



2012 In-Market Research Report



Vancouver, Coast and Mountains



TourismBC

enrg RESEARCH GROUP



Executive Summary

This report summarizes key highlights for the Vancouver, Coast and Mountains (VCM) region taken from the British Columbia In-Market study conducted in November 2011 and April 2012. A full report on the findings, plus summaries of the other BC tourism regions are available under separate covers.

- *Visitors to any region in BC are looking for destinations which offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.*
- *Most respondents are familiar with VCM destinations, particularly Vancouver and Whistler.*
- *Key activities which motivated trips to VCM were sightseeing, nature, wildlife viewing; visiting friends or relatives and hiking.*
- *It therefore follows that visitors to VCM are likely to participate in sightseeing, nature, wildlife viewing, shopping, hiking and visiting friends or relatives on their trip.*
- *Over half (55%) of respondents are likely to visit VCM in the next two years, most likely for a 'getaway' (1-2 nights) or a 'mini-vacation' (3-5 nights) during the summer. Outdoor recreation activities and experiencing scenery and nature are key motivators for future trips to VCM.*
- *The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre-trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.*
- *Preferring to visit a different or international location and lack of interest in visiting or returning to the region were key reasons given by respondents that are unlikely to take a trip to VCM in the next two years.*
- *Over half (52%) of visitors to VCM have a positive overall impression of the region, which ranks it 3rd out of the 6 British Columbia Tourism regions, after Vancouver Island and the Kootenay Rockies.*



Background & Methodology

BACKGROUND

This document highlights the results of a two-part In-Market study conducted among residents of British Columbia, Alberta, Western Washington State and Eastern Washington State in late 2011 and early 2012. These surveys were conducted to update similar studies conducted in 2008 and 2006.

The purpose of these ongoing studies is to provide the Ministry and the six tourism regions with market profiles and brand attitudes from key regional markets.

DATA COLLECTION

The surveys were distributed to respondents on-line. Survey programming, hosting and data collection was undertaken by NRG Research, utilizing Research Now's on-line panel. A quota sample was used to ensure that each region had enough responses to create reliable profiles. In total, n=3,051 surveys were conducted in 2011/2012, with n=746 evaluations conducted for the Vancouver, Coast and Mountains (VCM) region for destinations other than Vancouver or Whistler.

DATA ANALYSIS

The data was weighted to accurately reflect the population of travellers from each of the markets profiled, based on region, gender, age and education.

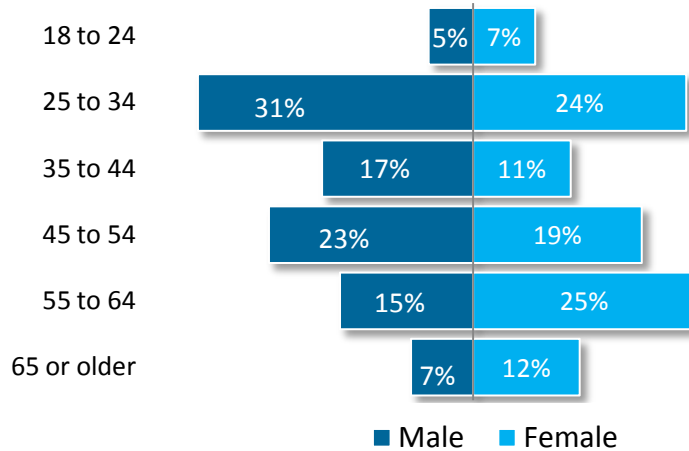




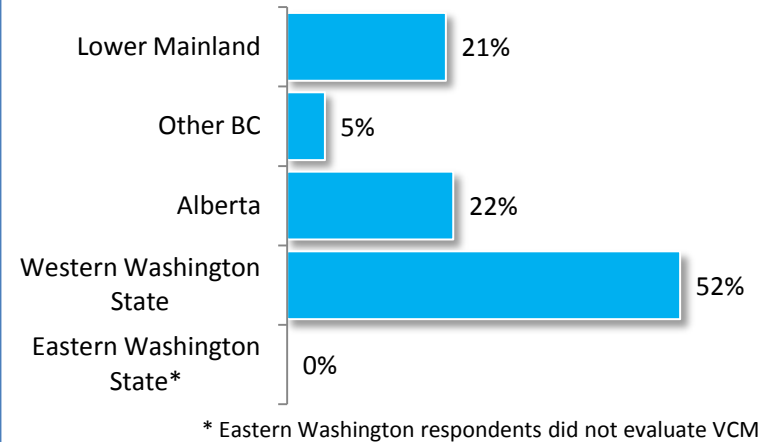
Respondent Characteristics - VCM

- Respondents who evaluated VCM (n=746) represent an even proportion of males and females, and spread of age; over half were from Western Washington. They were predominantly post-secondary educated and have a wide range of income levels.

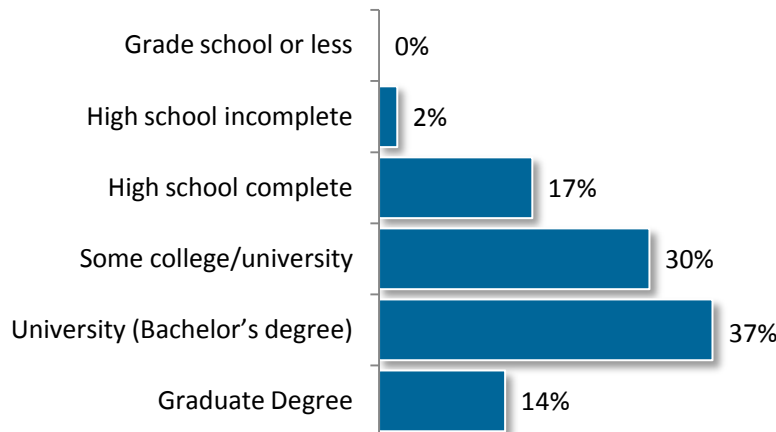
Gender & Age



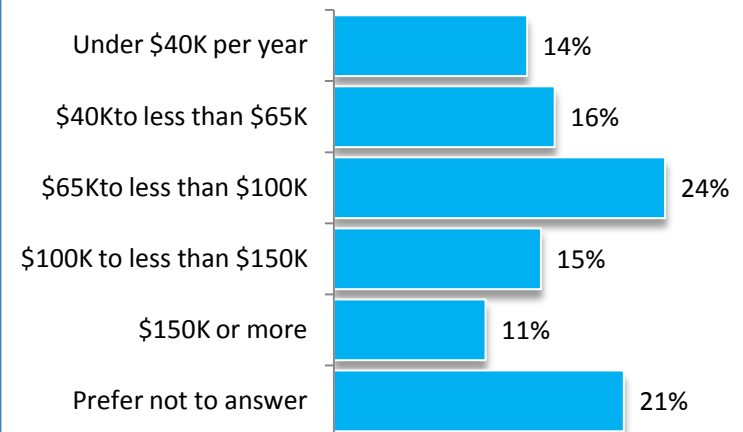
Respondent Origin



Education



Household Income

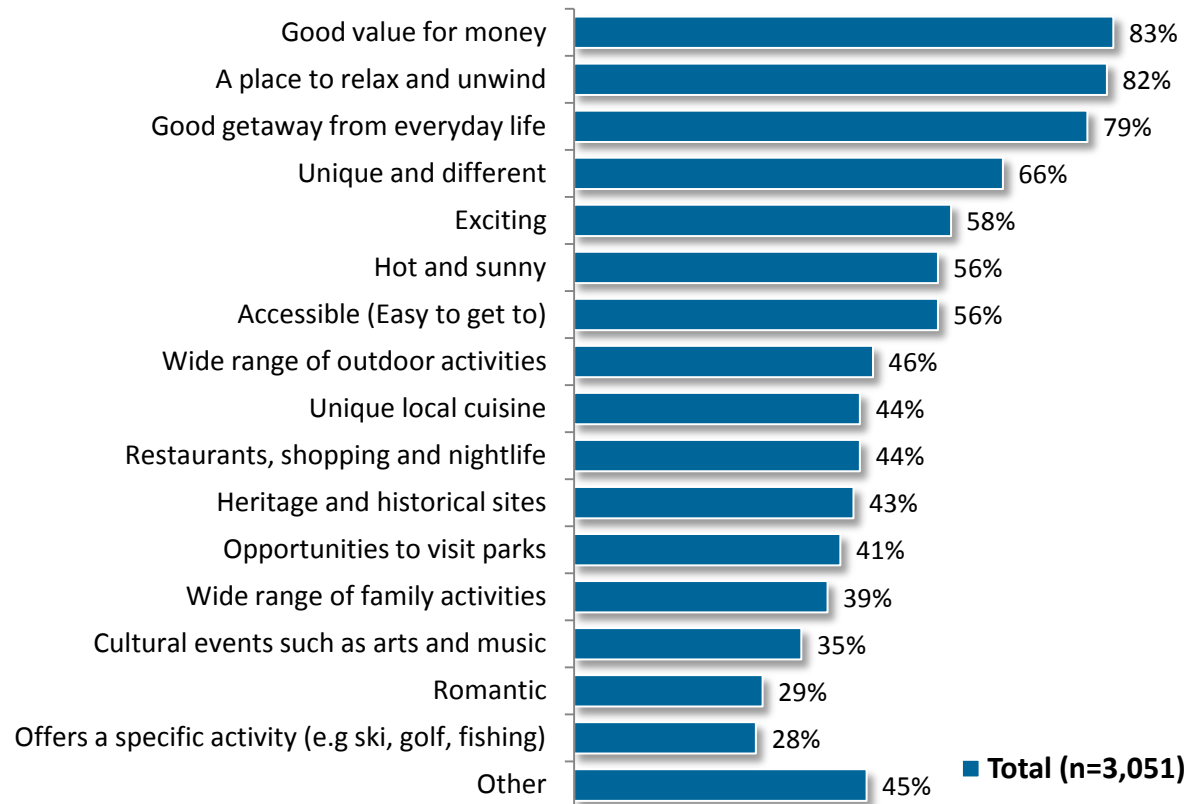




Top Factors in choosing a BC destination

- The most important factors, (top 2 box ratings*), for choosing a BC destination are those which offer good value for money, a place to relax and unwind and serves as a good getaway from everyday life. After the top three factors, there is a significant drop in the proportion of ratings to destinations which are unique and different, exciting and hot and sunny.

Top Factors in choosing a destination

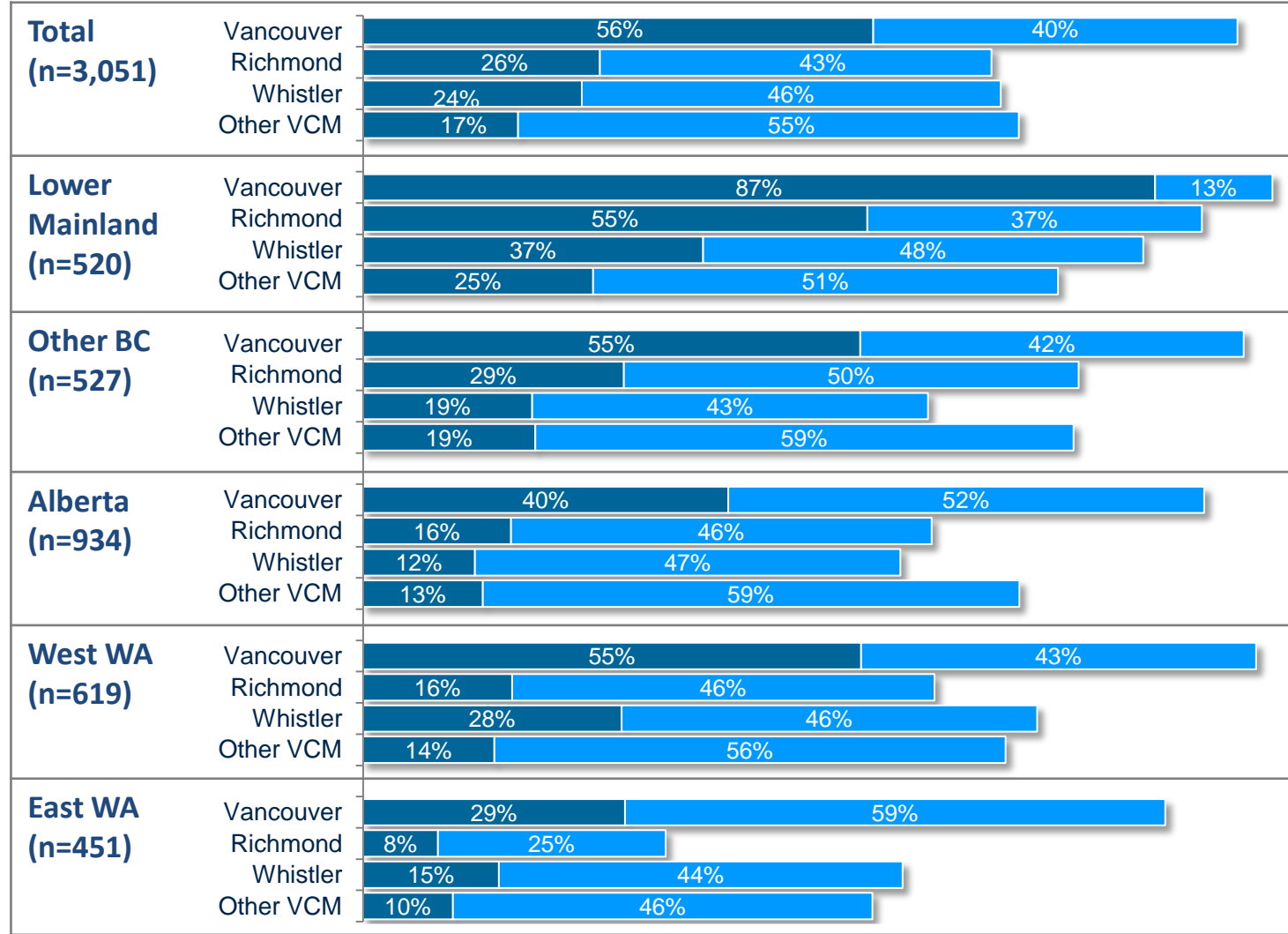


* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.



Familiarity with VCM – by Origin

- Not surprisingly, Vancouver is the VCM destination with the highest familiarity. Overall, around 7 in 10 are somewhat or very familiar with other VCM destinations.



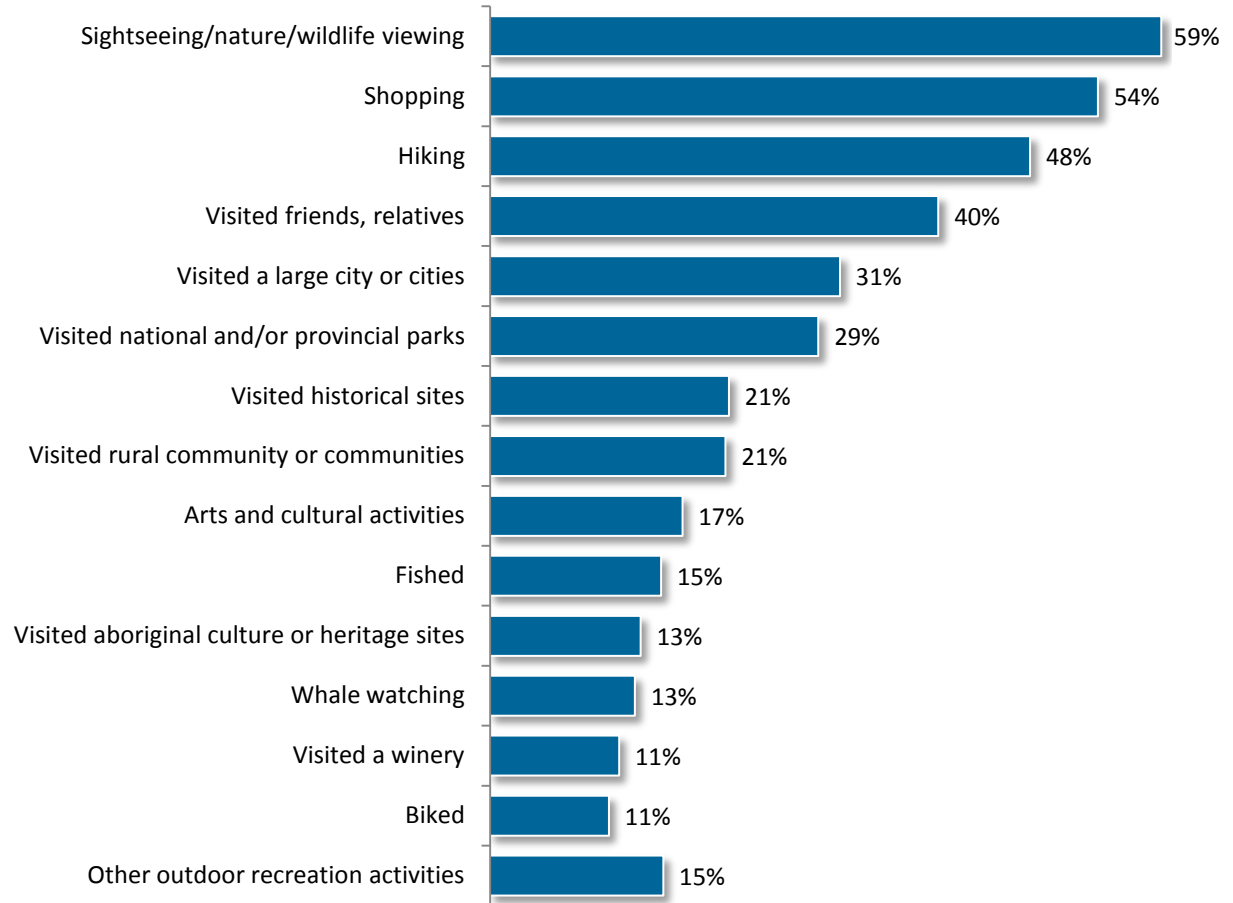
■ Very Familiar ■ Somewhat Familiar



Activities Participated In - VCM

- Visitors to Vancouver, Coast and Mountains destinations (other than Vancouver or Whistler) were most likely to have participated in sightseeing, nature, wildlife viewing, shopping, hiking and visiting friends or relatives on their trip. Other key activities included visiting cities, national or provincial parks, historical sites or rural communities.

Top Activities Participated In – VCM*



Base: Evaluated VCM, n=746.

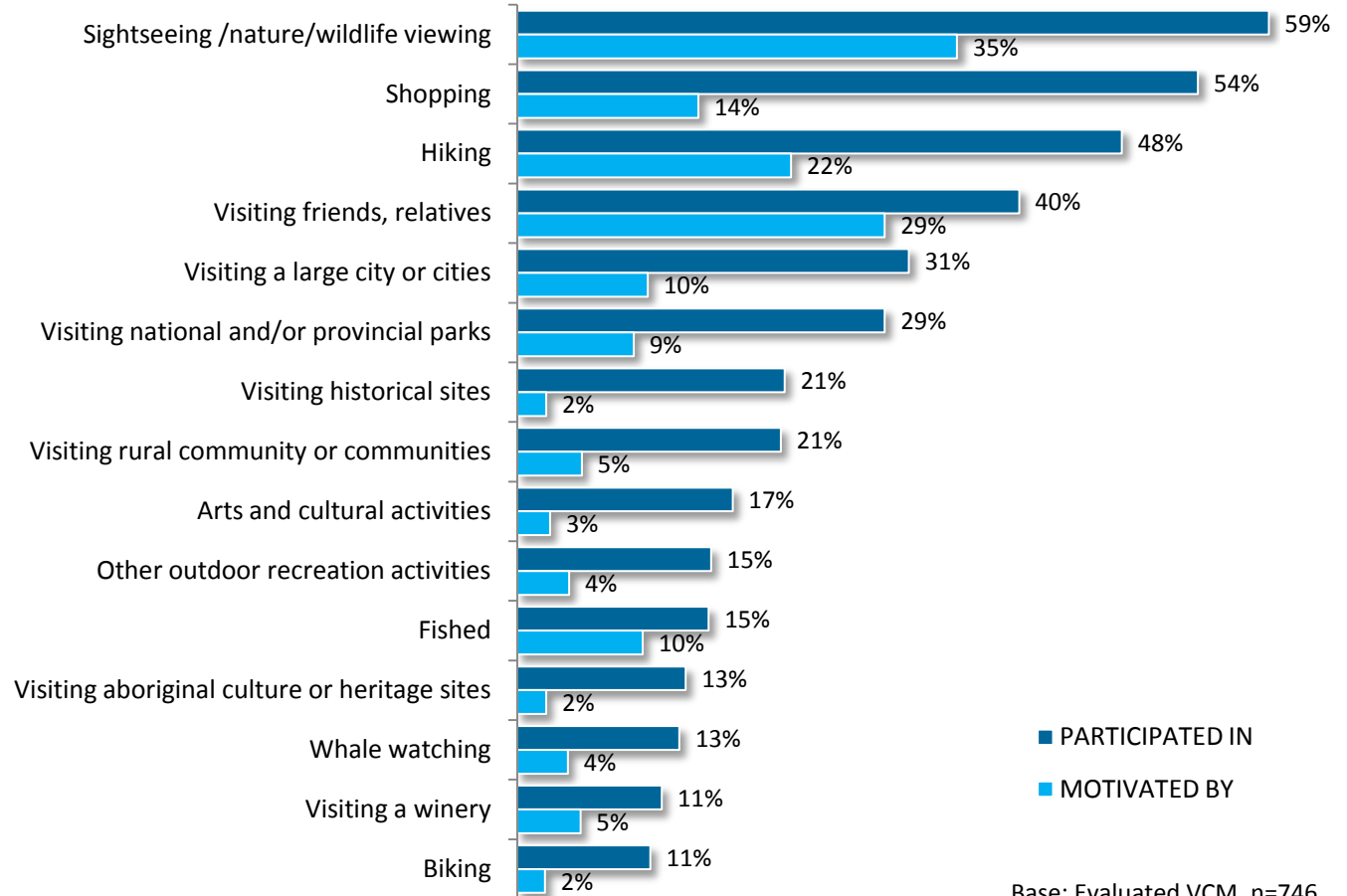
* Vancouver, Richmond and Whistler were omitted in evaluations of VCM.



Motivating vs. Participating - VCM

- Visitors to Vancouver, Coast and Mountains destinations participated in a far greater range of activities while on their trip than they were originally motivated by. Sightseeing, visiting relatives and shopping were the most common trip motivators.
- Those activities with the largest gap in motivation vs. participation offer the largest opportunities to differentiate from competing destinations

Motivating vs. Participating Activities



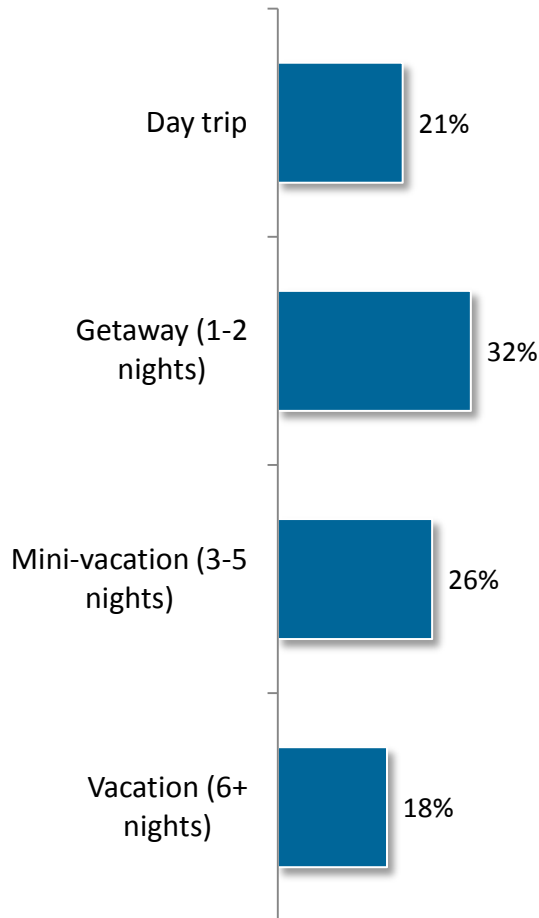
Base: Evaluated VCM, n=746.



Future Trips to Vancouver, Coast and Mountains

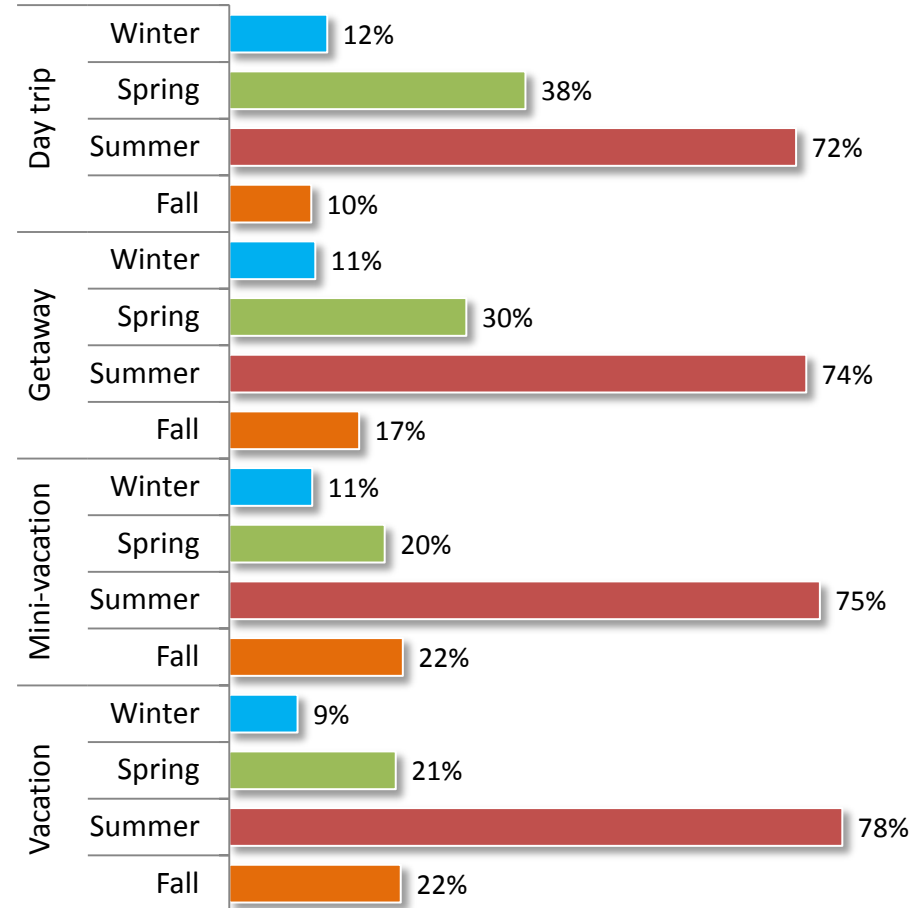
- One-third of those who evaluated VCM are likely to take a ‘getaway’ trip to that region in the next two years, while one-quarter are likely to take a mini-vacation.
- Most future trips are planned for the summer. Note the higher proportion of day trips and getaways to VCM in spring compared to longer trips.

Likelihood to Take Different Trip Durations (% top 2 box)



Base: Evaluated VCM, n=746.

Season of Trip by Trip Type



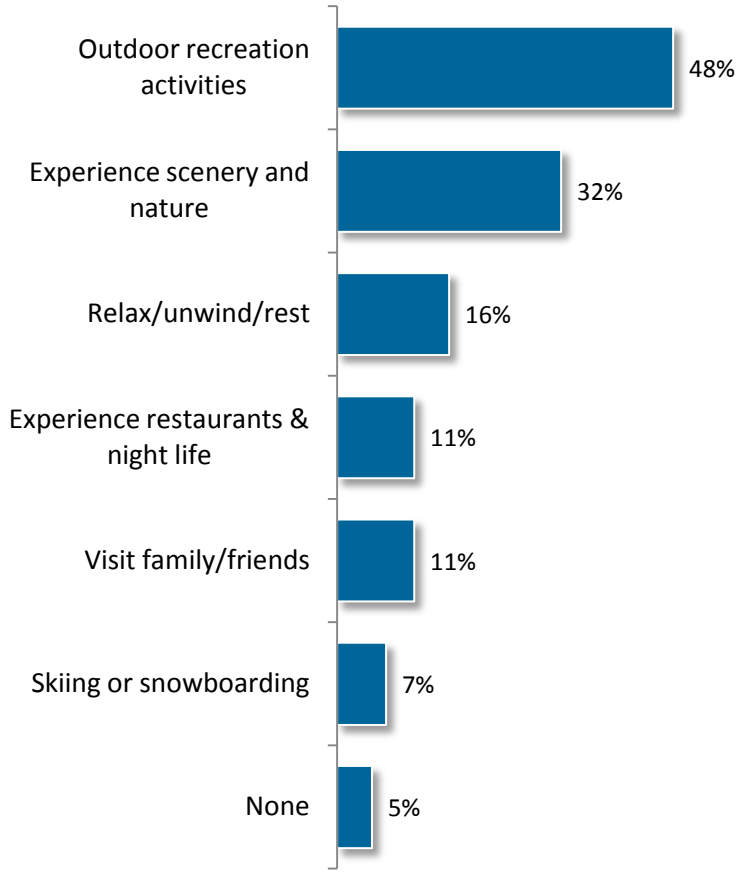
Base: Likely to take trip. Day, n=154, Getaway, n=238, Mini V, n=191, Vacation, n=135



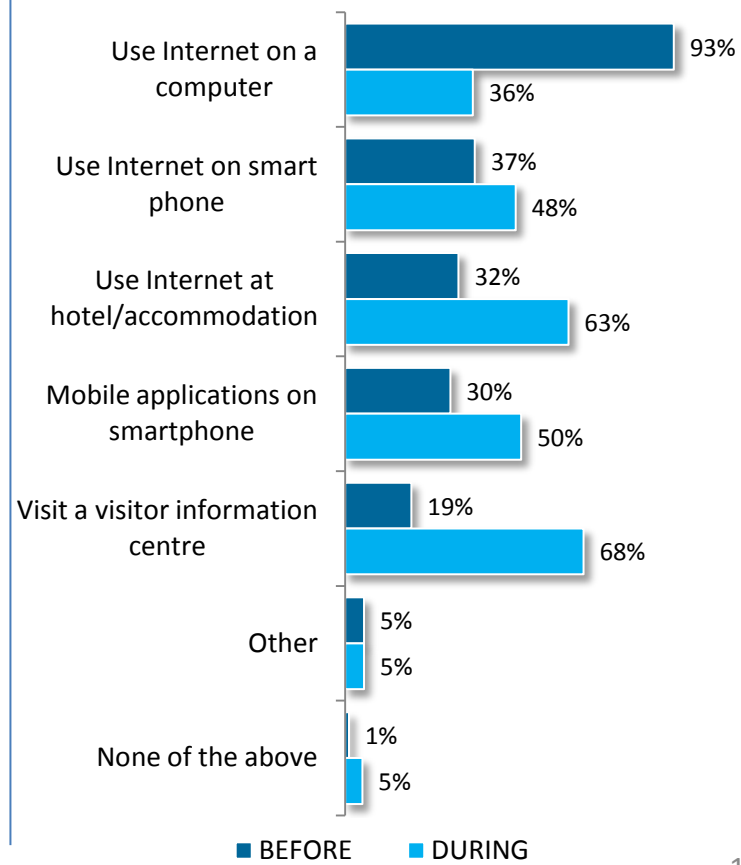
Future Trips to Vancouver, Coast and Mountains

- Outdoor recreation activities are a motivator for almost half of those likely to take a trip to VCM, followed by experiencing scenery and nature and to relax and unwind.
- The Internet (accessed on a computer) is the key pre-trip information source, while visitor centres, Internet at accommodations and Internet on mobile devices would be used for information during future trips.

Main Activities for future trips



Trip Planning Tools



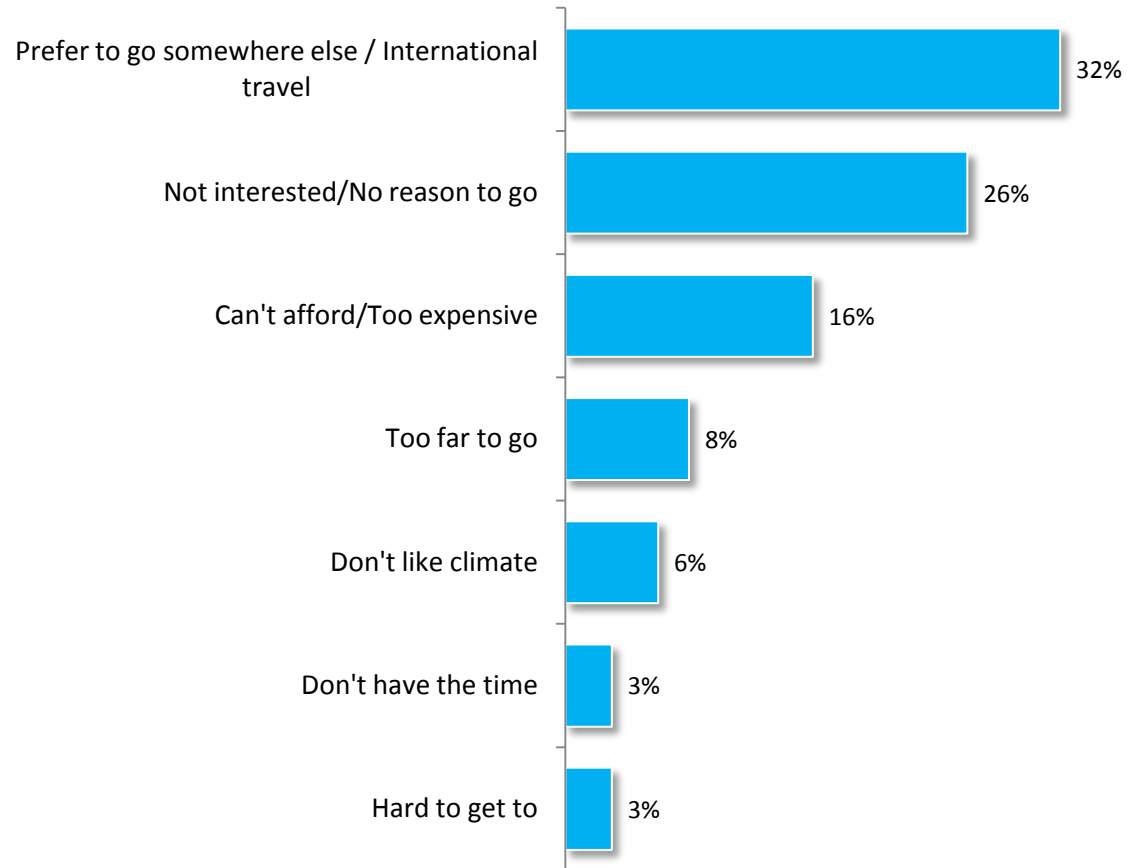
Base (Both charts): Likely to take a trip to VCM, n=414.



Reasons for being unlikely to visit - VCM

- Those not likely to visit Vancouver, Coast and Mountains in the next 2 years cited preferring to go to a different/international destination. One-in-four were not interested, followed by 16% who are unlikely to visit due to costs.

Reasons for being unlikely to visit

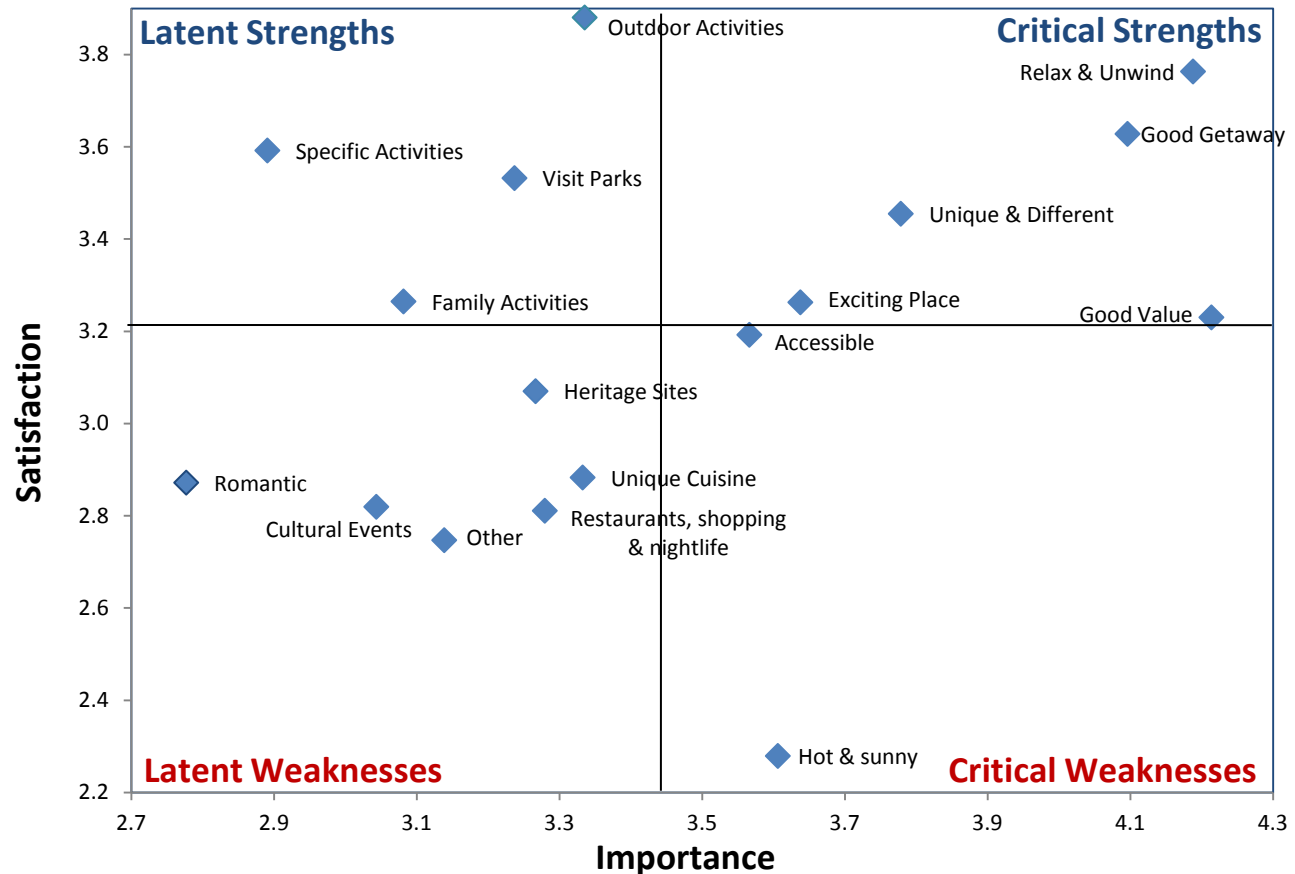


Base: Unlikely to take trip to VCM in next 2 years, n=332.



Factors Associated with VCM – Importance/Satisfaction Matrix

- The importance/satisfaction matrix divides attributes into four quadrants based on the average importance and satisfaction scores for each attribute. The axis of the matrix shows the overall average importance and satisfaction scores (out of 5) for all attributes.
- Being a place to relax and unwind, a good getaway and being unique and different are critical strengths for VCM. Good value is very important but receives an average satisfaction rating.
- Outdoor activities, specific activities, visit national/provincial parks, and family activities are latent strengths for the region.



Factors Associated with VCM



- Residents of Alberta are most likely to associate VCM with restaurants, shopping and nightlife and family activities.
- Respondents from BC (both Lower Mainland and Other BC residents) also associate VCM restaurants, shopping & nightlife and family activities, however these associations are weaker compared to Albertan residents.
- In contrast to BC and Alberta, Western Washington State residents are more likely to consider VCM to be a place for specific activities, visiting parks, a place that is unique and romantic, with unique cuisine. There is a relatively weaker association with family activities and restaurants, shopping and nightlife compared to Albertan respondents.
- Specific associations are highlighted in the table below:

<p>Lower Mainland/ Other BC</p> <ul style="list-style-type: none"> • Restaurants, shopping & nightlife • Family activities 	<p>Calgary/ Edmonton/ Other Alberta</p> <ul style="list-style-type: none"> • Restaurants, shopping & nightlife • Family activities
<p>Other Western Washington</p> <ul style="list-style-type: none"> • Unique Cuisine • Unique • Romantic • Family activities • Restaurants, shopping & nightlife 	<p>Greater Seattle</p> <ul style="list-style-type: none"> • Offers a specific activity • A place with opportunities to visit national and provincial or state parks (Visit Parks)



Overall Impressions

- Half of respondents who are familiar with VCM have a very favourable overall impression of the region.
- VCM is rated less favourably overall than Vancouver Island and the Kootenay Rockies by respondents familiar with those regions. Overall impressions of VCM are in line with the Thompson Okanagan region, and more favourable than the Cariboo Chilcotin Coast and Northern BC regions.

Overall Impressions of BC Regions as Vacation Destinations * Top 2 Box



* Main urban centres were omitted from the following regional evaluations:

VCM: Vancouver, Richmond & Whistler. **VI:** Victoria. **TOTA:** Kelowna & Kamloops.

Base: Evaluated Region.



Implications to Consider

- Leverage the higher levels of familiarity that VCM has relative to other BC tourism regions to draw attention, and encourage trips to lesser-known areas within the region.
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to VCM tend to make most decisions about what activities to participate in while on their trip, placing high importance on the accessibility of visitor centres and other information sourced during the visit.
- The Internet and/or using applications on smart phones continue to emerge as important information sources. As such, it is important to ensure online content is up-to-date and reflective of the current season while providing easy-to-access information about activities for other seasons. The Internet is also the key resource for trip-planning information.
- Shoulder seasons offer the greatest opportunities for growth in tourism to the region. VCM is already a relatively popular destination for daytrips and getaways in the spring, presenting an opportunity to increase the number of trips taken and/or the duration of visits during this season.
- Highlight the wide variety of available outdoor activities as well as ‘shoulder-season’ outdoor activities to encourage future trips. However it is also important to emphasize the more passive, comfort-oriented activities that are available in the region to encourage visits during seasons which are less optimal for outdoor recreation activities and to ensure that the interests of the wider target market are not overlooked. Highlighting the variety of available activities will also help address the key reasons given by those unlikely to visit, namely, not being interested or preferring a different destination.
- Consider using promotional material that focuses on the associations the various target populations have with the region. For example, respondents from Western Washington are more likely to associate VCM with unique cuisine, restaurants, shopping and nightlife and family activities than their BC and Albertan counterparts.



Appendix:

Vancouver, Coast and Mountains:

Evaluations by Respondent Origin





Appendix - Regional Evaluations by Respondent Origin

- The tables on the following slides take a more in-depth review of the Vancouver, Coast and Mountains region.
- Responses have been tabulated based on the origin of the respondent who evaluated the region.
- The data in these tables uses the 'WT2' weighting scheme. That is, it accurately reflects the population of travellers from each of the markets profiled, based on region, gender and age.
- Cells that have been highlighted in either blue (higher) or pink (lower) represent a difference compared to at least one other region.
- Bases are not weighted. In a few instances, the base size is very low. As such, these results should be interpreted with caution. These cases have been highlighted with an asterisk.

Importance of Factors in Choosing a Destination Among those who have Visited VCM



Destination Attributes – Top 2 Box Importance	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Offers good value for money	85.2%	82.9%	80.9%	83.1%		82.8%
A place to relax and unwind	81.3%	83.7%	91.8%	77.5%		83.0%
Serves as a good getaway from everyday life	68.8%	76.9%	82.9%	71.0%		74.7%
Unique and different, feels quite different from home	57.8%	67.0%	61.1%	69.0%		64.4%
Hot and sunny	60.6%	51.6%	79.7%	39.2%		56.5%
An exciting place to be	54.2%	53.0%	55.2%	52.7%		53.8%
Accessible (Easy to get to)	69.7%	64.8%	43.4%	38.1%		46.9%
Offers wide range of outdoor activities	47.5%	45.0%	50.3%	65.5%		56.4%
Unique local cuisine	49.5%	57.3%	46.8%	64.8%		56.0%
Heritage and historical sites	46.2%	47.5%	44.2%	24.9%		36.0%
Opportunities to visit national, provincial or state parks	45.7%	42.8%	29.6%	43.7%		39.5%
Restaurants, shopping and nightlife	43.6%	30.9%	38.6%	38.6%		39.1%
Offers wide range of activities for the entire family	36.9%	36.3%	51.2%	70.7%		56.6%
Offers cultural events such as arts and music	43.2%	24.1%	32.6%	22.0%		29.3%
Offers a specific activity (like ski, golf, fishing etc.)	14.8%	17.1%	30.4%	39.6%		31.1%
Romantic	27.3%	35.3%	18.2%	46.8%		33.6%
Other	64.8%	34.1%	72.7%	31.6%		60.5%
UNWEIGHTED BASE:	40	51	53	29*		173

*Caution: Low base

Activities Participated In – VCM by Origin



Activities Participated In	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	51.7%	56.9%	65.3%	60.3%		59.3%
Shopping	43.9%	54.9%	56.7%	57.4%		53.7%
Hiking	57.1%	40.5%	53.1%	39.2%		47.7%
Visiting friends, relatives	30.1%	69.7%	60.1%	26.9%		39.6%
Visiting national and/or provincial parks	29.4%	20.1%	33.7%	26.7%		29.0%
Visiting rural community or communities	20.3%	29.3%	19.5%	20.9%		20.8%
Visiting historical sites	19.0%	23.5%	17.8%	24.3%		21.1%
Visiting a large city or cities	22.9%	25.8%	35.3%	33.5%		30.9%
Other outdoor recreation activities	16.9%	24.6%	12.0%	15.2%		15.3%
Fishing	16.2%	8.4%	15.8%	14.9%		15.1%
Visiting a winery	9.5%	12.3%	15.7%	9.5%		11.4%
Arts and cultural activities	15.8%	14.7%	15.8%	18.8%		17.0%
Participated in water sports	9.9%	5.9%	17.0%	3.0%		8.9%
Attended festival or event	16.6%	13.4%	4.9%	5.4%		8.6%
Visited aboriginal culture or heritage sites	13.1%	15.3%	8.8%	16.3%		13.3%
Biking	16.9%	9.3%	7.5%	8.8%		10.5%
Golf	3.6%	8.2%	13.3%	2.4%		6.1%
Whale watching	9.7%	5.9%	17.5%	12.3%		12.8%
Watching sporting events	5.6%	9.6%	3.1%	4.8%		4.8%
Skiing or snowboarding	11.5%	5.1%	4.5%	1.8%		5.2%
Participated in sporting events	5.2%	2.0%	5.3%	2.4%		3.9%
None of the above	3.6%	5.2%	0.0%	0.0%		1.2%
UNWEIGHTED BASE:	89	99	89	53		330

Activities Which Motivated Trips – VCM by Origin



Motivating Activities	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	27.5%	26.9%	35.4%	39.8%		34.7%
Shopping	15.3%	9.4%	7.3%	19.2%		14.3%
Hiking	28.8%	8.7%	20.3%	19.9%		21.6%
Visiting friends, relatives	20.1%	53.9%	51.1%	15.6%		29.0%
Visiting national and/or provincial parks	8.0%	4.7%	10.3%	9.9%		9.2%
Visiting rural community or communities	9.6%	7.7%	3.2%	3.3%		5.1%
Visiting historical sites	3.7%	2.0%	3.0%	0.9%		2.3%
Visiting a large city or cities	5.9%	1.7%	8.7%	15.4%		10.3%
Other outdoor recreation activities	3.4%	17.0%	2.1%	4.2%		4.1%
Fishing	9.6%	3.8%	6.8%	13.1%		9.9%
Visiting a winery	4.2%	3.8%	7.0%	4.2%		5.0%
Arts and cultural activities	2.8%	4.6%	0.7%	3.5%		2.6%
Participated in water sports	2.3%	0.9%	6.2%	1.8%		3.1%
Attended festival or event	5.1%	7.1%	0.7%	2.4%		2.9%
Visited aboriginal culture or heritage sites	1.9%	5.9%	1.3%	2.7%		2.3%
Biking	5.4%	2.5%	1.7%	0.4%		2.2%
Golf	0.9%	1.6%	8.6%	0.0%		2.8%
Whale watching	4.0%	1.8%	5.1%	3.5%		4.0%
Watching sporting events	0.0%	3.5%	1.4%	0.0%		0.6%
Skiing or snowboarding	5.9%	1.7%	3.6%	1.8%		3.3%
Participated in sporting events	2.3%	0.0%	3.3%	1.2%		2.0%
None of the above	10.5%	10.4%	0.0%	0.0%		3.2%
UNWEIGHTED BASE:	89	99	89	53		330

Participation vs. Motivation – VCM by Origin

Participation Versus Motivation	Origin of Respondent										Total	
	Lower Mainland		Other BC		Alberta		West WA		East WA			
	P	M	P	M	P	M	P	M	P	M	P	M
Sightseeing/nature/wildlife viewing	52%	28%	57%	27%	65%	35%	60%	40%			59%	35%
Shopping	44%	15%	55%	9%	57%	7%	57%	19%			54%	14%
Hiking	57%	29%	41%	9%	53%	20%	39%	20%			48%	22%
Visiting friends, relatives	30%	20%	70%	54%	60%	51%	27%	16%			40%	29%
Visiting national and/or provincial parks	29%	8%	20%	5%	34%	10%	27%	10%			29%	9%
Visiting rural community or communities	20%	10%	29%	8%	20%	3%	21%	3%			21%	5%
Visiting historical sites	19%	4%	24%	2%	18%	3%	24%	1%			21%	2%
Visiting a large city or cities	23%	6%	26%	2%	35%	9%	34%	15%			31%	10%
Other outdoor recreation activities	17%	3%	25%	17%	12%	2%	15%	4%			15%	4%
Fishing	16%	10%	8%	4%	16%	7%	15%	13%			15%	10%
Visiting a winery	10%	4%	12%	4%	16%	7%	10%	4%			11%	5%
Arts and cultural activities	16%	3%	15%	5%	16%	1%	19%	4%			17%	3%
Participated in water sports	10%	2%	6%	1%	17%	6%	3%	2%			9%	3%
Attended festival or event	17%	5%	13%	7%	5%	1%	5%	2%			9%	3%
Visited aboriginal culture or heritage sites	13%	2%	15%	6%	9%	1%	16%	3%			13%	2%
Biking	17%	5%	9%	3%	8%	2%	9%	0%			11%	2%
Golf	4%	1%	8%	2%	13%	9%	2%	0%			6%	3%
Whale watching	10%	4%	6%	2%	18%	5%	12%	4%			13%	4%
Watching sporting events	6%	0%	10%	4%	3%	1%	5%	0%			5%	1%
Skiing or snowboarding	12%	6%	5%	2%	5%	4%	2%	2%			5%	3%
Participated in sporting events	5%	2%	2%	0%	5%	3%	2%	1%			4%	2%
None of the above	4%	11%	5%	10%	0%	0%	0%	0%			1%	3%
UNWEIGHTED BASE:	89		99		89		53				330	



Likelihood of taking a trip – VCM by Origin



Likelihood to take type of trip (% Probably/Definitely)	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Day trip	43.4%	23.6%	12.1%	15.0%		20.7%
Getaway (1-2 nights)	45.9%	31.8%	12.7%	34.7%		32.0%
Mini-vacation (3-5 nights)	25.4%	28.6%	36.4%	20.8%		25.6%
Vacation (6+ nights)	12.2%	18.9%	32.1%	14.3%		18.1%
UNWEIGHTED BASE:	155	157	151	155		618

Activities Motivating Future Trips – VCM by Origin

Main activities on future trips	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
A trip for outdoor recreation activities.	52.0%	62.6%	47.3%	45.7%		48.2%
A trip to experience scenery and nature	33.7%	33.2%	29.1%	31.4%		31.5%
A trip to relax/unwind/rest	18.2%	19.5%	11.6%	16.8%		16.0%
A trip to visit family/friends	10.8%	20.9%	21.2%	4.5%		10.6%
A trip to visit national and/or provincial parks	7.6%	0.7%	3.6%	3.6%		4.4%
A trip to experience restaurants and night life	6.7%	1.7%	6.1%	17.0%		11.4%
A skiing or snowboarding trip	5.0%	7.6%	11.9%	4.6%		6.5%
A trip to visit historical sites	3.3%	2.0%	2.2%	0.0%		1.4%
A trip to visit cities	3.0%	4.6%	0.7%	0.3%		1.2%
A trip to see arts and cultural activities	0.8%	1.7%	0.0%	0.8%		0.7%
A romantic getaway	0.0%	1.1%	1.3%	2.4%		1.5%
A trip to experience aboriginal culture and heritage	0.9%	0.0%	0.0%	0.0%		0.2%
A trip to experience multi-cultural life	0.8%	0.0%	0.0%	0.8%		0.6%
Other	0.9%	0.9%	3.5%	0.0%		1.1%
None	7.9%	7.3%	1.8%	4.4%		4.7%
UNWEIGHTED BASE:	92	85	90	76		343



Reasons for Being Unlikely to Visit – VCM by Origin

Reasons for being unlikely to visit	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Not interested/No reason to go	29.8%	18.4%	22.5%	27.5%		26.4%
Prefer to go somewhere else / International travel	34.1%	18.5%	43.5%	29.1%		32.4%
Can't afford/Too expensive	7.1%	37.0%	13.1%	17.3%		15.7%
Too far to go	1.2%	2.0%	14.0%	8.1%		7.7%
Don't like climate	6.4%	2.7%	3.9%	6.7%		5.8%
Don't have the time	1.3%	2.7%	4.6%	3.6%		3.3%
Too familiar	3.8%	2.9%	3.2%	1.4%		2.3%
Border/passport hassle	0.0%	0.0%	0.0%	3.1%		1.7%
Haven't thought about it	1.3%	0.0%	0.0%	0.0%		0.2%
Hard to get to	3.2%	0.0%	1.0%	3.3%		2.6%
Health issues	0.0%	2.7%	1.3%	0.8%		0.9%
Already live there	1.2%	4.0%	6.0%	0.0%		1.7%
Other	1.3%	2.7%	0.0%	0.0%		0.4%
Don't know	10.5%	12.8%	1.4%	6.4%		6.5%
UNWEIGHTED BASE:	63	72	61	79		275



Timing of Trip Planning – VCM by Origin

	Timing of trip planning – tools used	Origin of Respondent					Total
		Lower Mainland	Other BC	Alberta	West WA	East WA	
Before	Use Internet on a computer	93.9%	95.2%	93.6%	92.4%		93.1%
	Use Internet on smart phone	37.3%	28.7%	40.2%	35.6%		36.8%
	Use Internet at hotel/accommodation	33.2%	38.2%	31.9%	31.2%		32.1%
	Mobile applications on smartphone	27.3%	14.6%	25.8%	34.2%		29.8%
	Visit a visitor information centre	18.1%	21.7%	25.3%	15.7%		18.8%
	Other	4.2%	2.9%	7.0%	5.3%		5.3%
	None of the above	2.4%	2.6%	2.0%	0.0%		1.1%
During	Visit a visitor information centre	63.5%	57.2%	71.7%	68.4%		67.6%
	Use Internet at hotel/accommodation	51.2%	49.5%	64.6%	69.5%		63.3%
	Mobile applications on smartphone	45.5%	39.7%	47.2%	54.1%		49.9%
	Use Internet on smart phone	40.6%	30.1%	43.3%	55.9%		48.3%
	Use Internet on a computer	29.4%	31.5%	40.6%	37.7%		36.2%
	Other	5.4%	2.7%	12.1%	2.4%		5.4%
	None of the above	12.7%	10.8%	4.2%	1.2%		4.9%
	UNWEIGHTED BASE:	92	85	90	76		343

