



2012 In-Market Research Report



Vancouver Island



TourismBC

enrg RESEARCH GROUP





Executive Summary

This report summarizes key highlights for the Vancouver Island (VI) 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 BC region 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 have some level of familiarity with Vancouver Island destinations, particularly Victoria.*
- *Key activities which motivated trips to VI were sightseeing, nature, wildlife viewing and visiting friends or relatives.*
- *It then follows that visitors to Vancouver Island are likely to participate in sightseeing, nature, wildlife viewing, shopping, visiting national or provincial parks and visiting friends or relatives on their trip.*
- *Two-thirds (68%) of respondents are likely to visit Vancouver Island 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, experiencing scenery and nature and to relax and unwind are key motivators for future trips to Vancouver Island.*
- *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.*
- *Cost/the perception of it being too expensive as well as preferring to visit a different or international location, are key reasons given by respondents who are unlikely to take a trip to Vancouver Island in the next two years.*
- *Almost three-quarters (72%) of visitors to VI have a positive overall impression of the region, which ranks it 1st out of the 6 British Columbia Tourism regions.*



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=711 evaluations conducted for the Vancouver Island (VI) region (other than Victoria).

DATA ANALYSIS

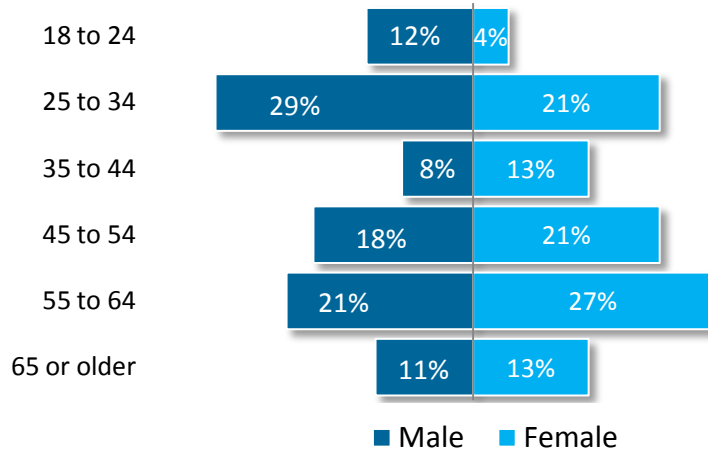
The data was weighted to accurately reflect the population of travellers from each of the markets profiled, based on region, gender, age and education.



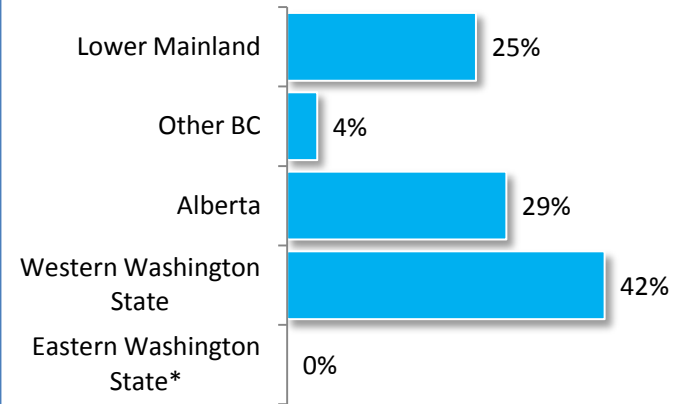
Respondent Characteristics - VI

- Respondents who evaluated Vancouver Island (n=711) were more likely to be female (56% vs. 44% male) and represent a wide spread of age. The the largest group were from Western Washington. They were predominantly post-secondary educated and have a range of incomes.

Gender & Age

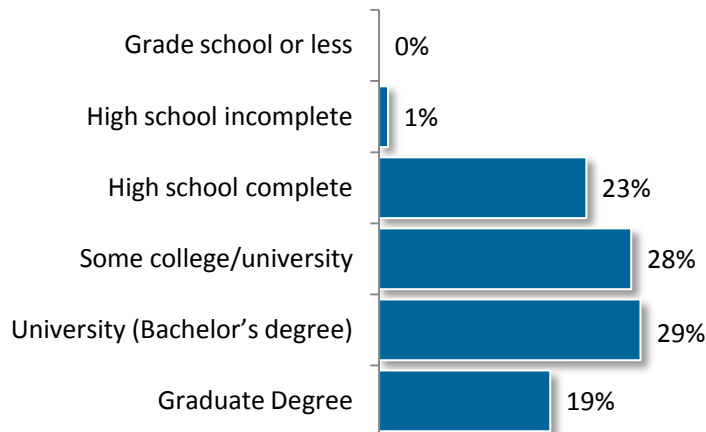


Respondent Origin

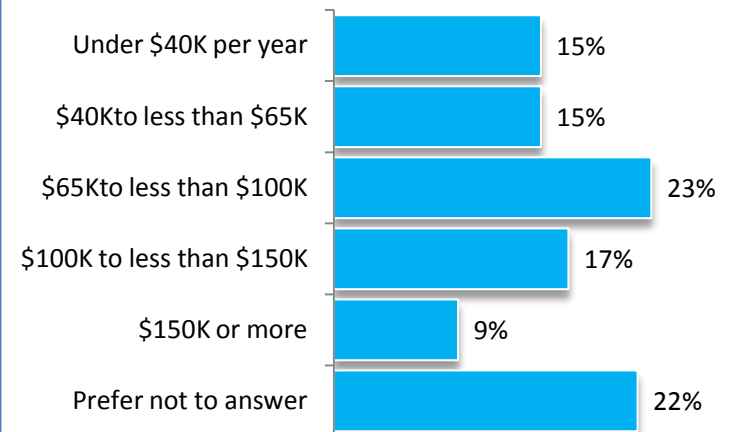


* Eastern Washington respondents did not evaluate VI

Education



Household Income

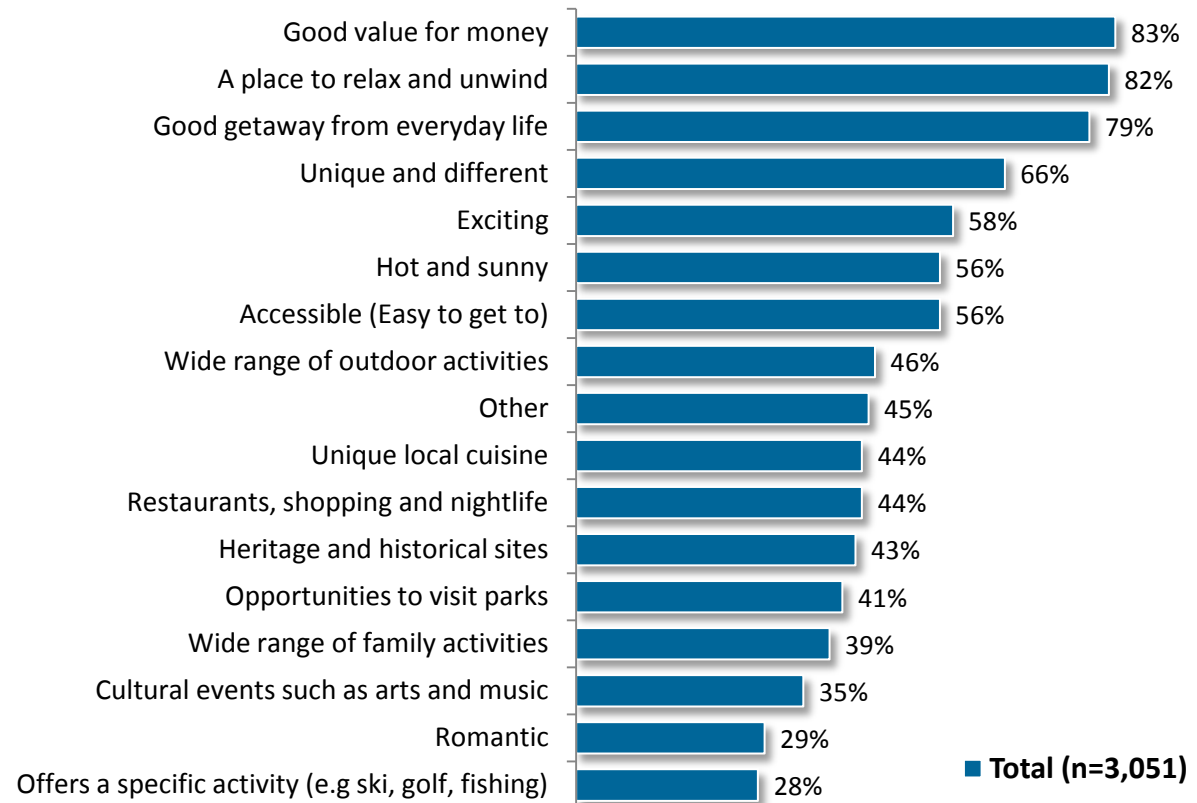




Top Factors in choosing a BC destination

- 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

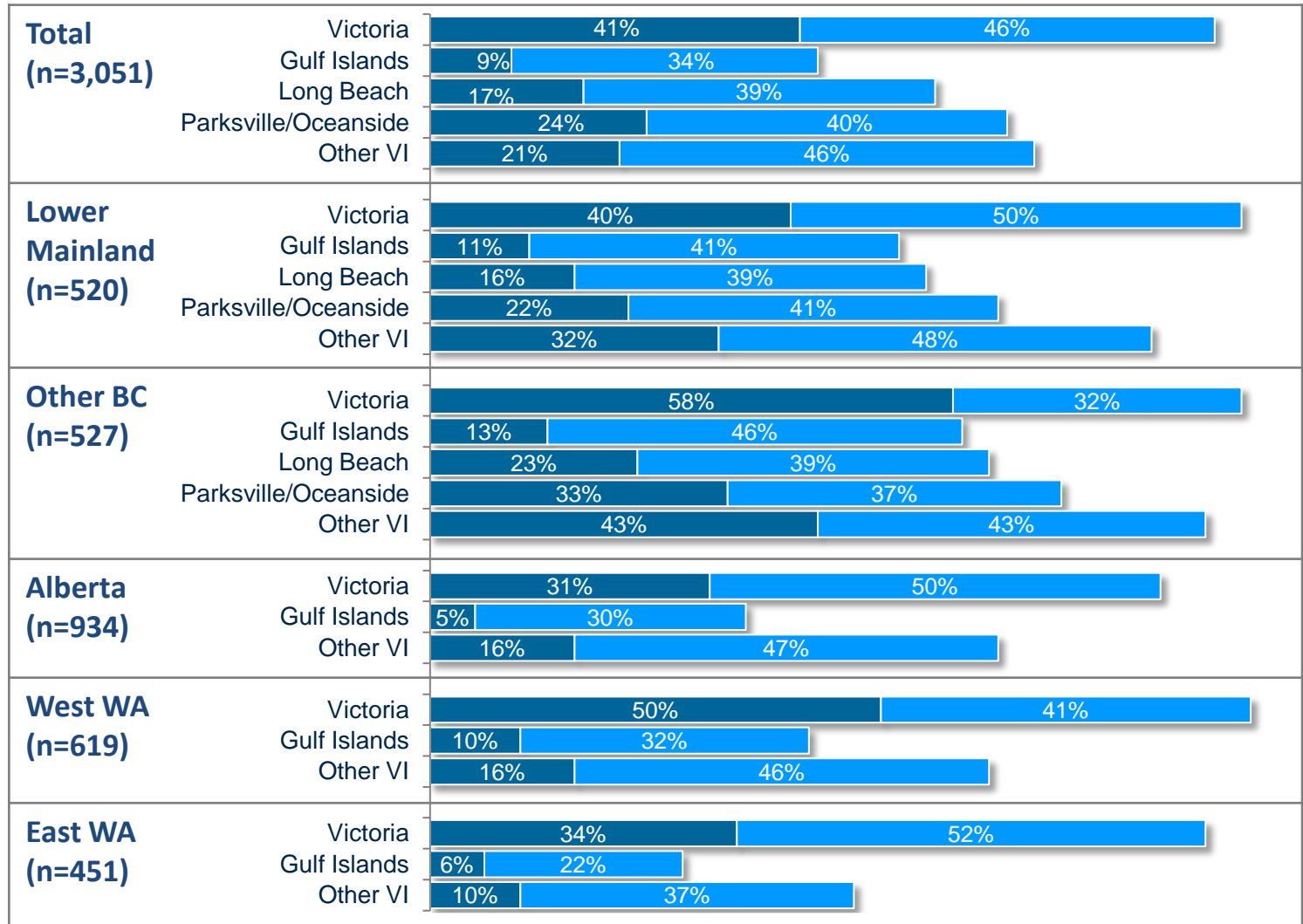


* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.



Familiarity with VI – by Origin

- Not surprisingly, Victoria is the VI destination with the highest familiarity. BC Residents tend to have the highest familiarity with lesser-known VI destinations compared to Albertan and Washington State residents.



Note: Only BC residents rated their familiarity with Long Beach & Parksville.

■ Very Familiar

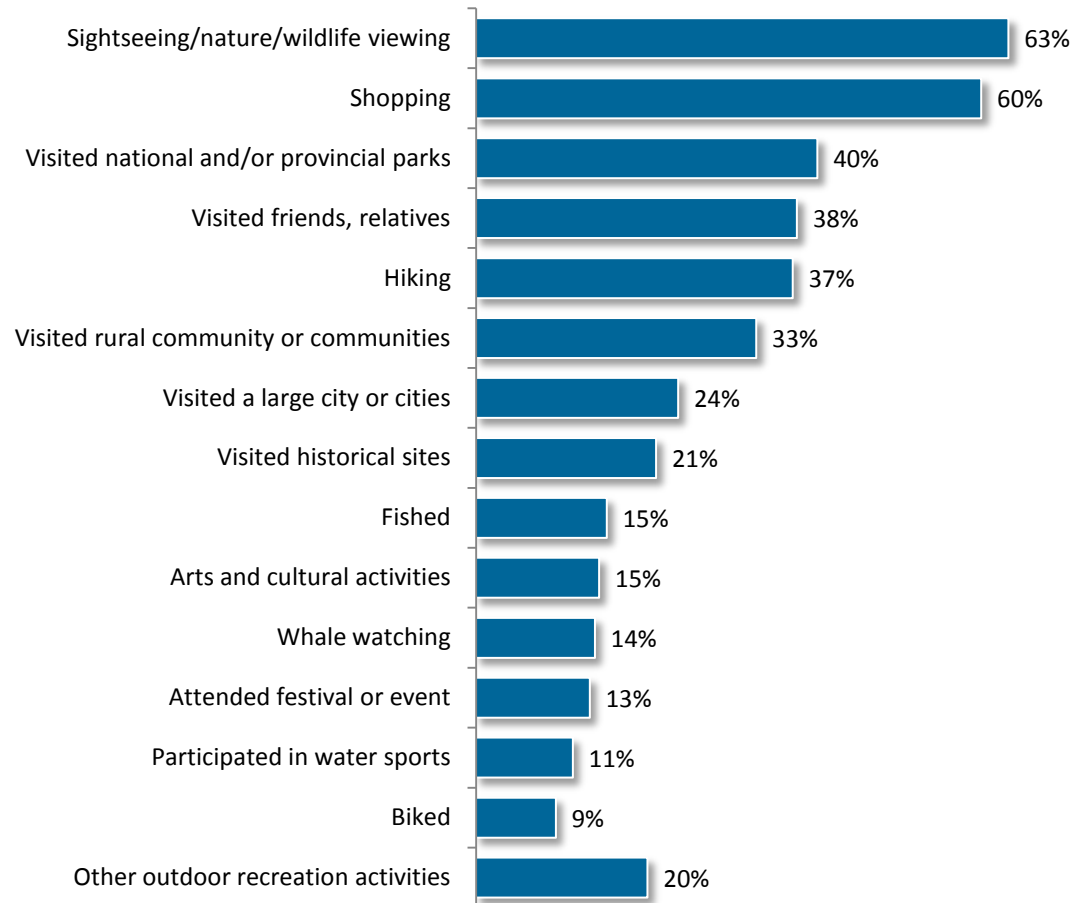
■ Somewhat Familiar



Activities Participated In - VI

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

Top Activities Participated In – VI *



Base: Evaluated VI, n=711.

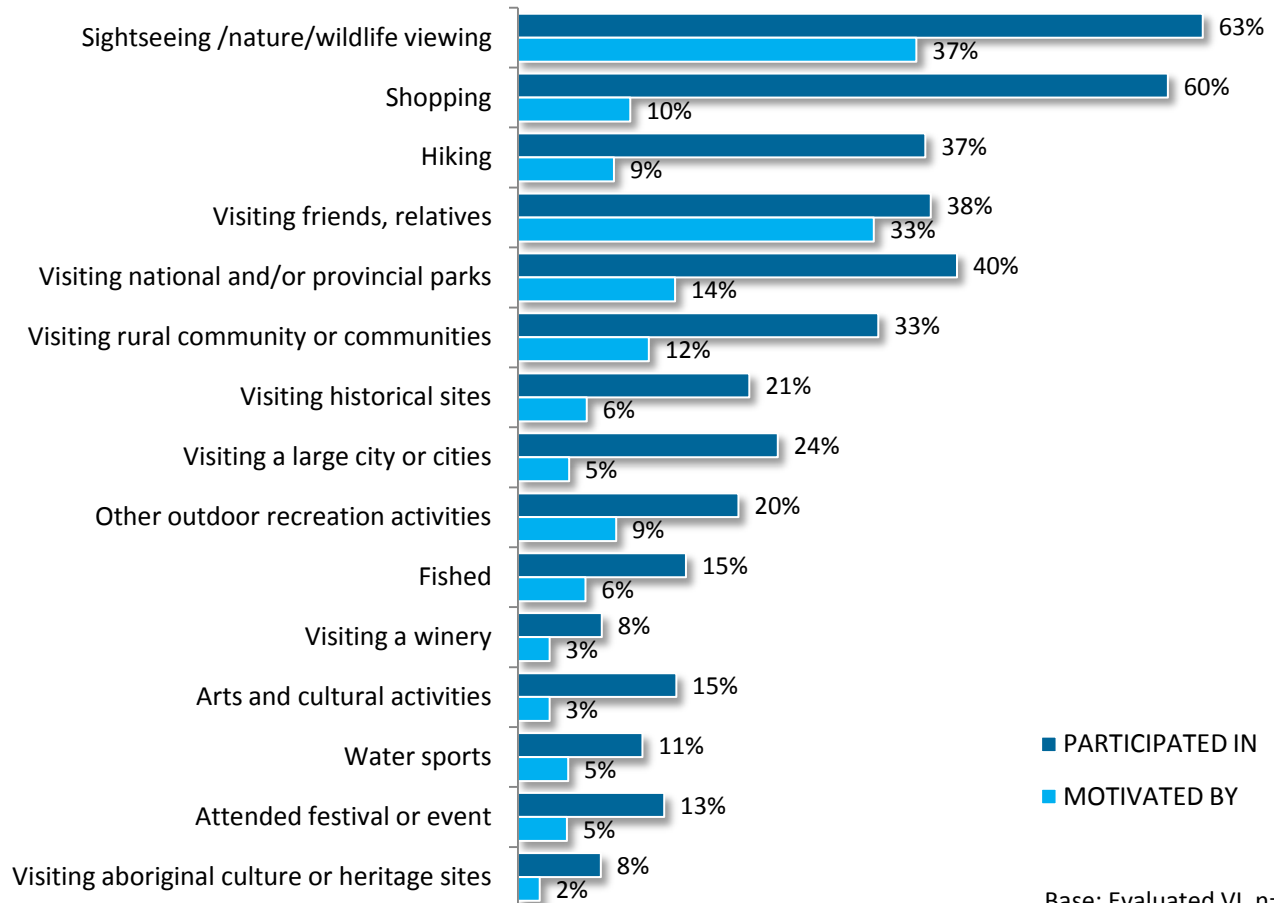
* Victoria was omitted in evaluations of VI.



Motivating vs. Participating - VI

- Visitors to Vancouver Island destinations participated in a far greater range of activities while on their trip than they were originally motivated by. Sightseeing, visiting friends, relatives and visiting national or provincial parks 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



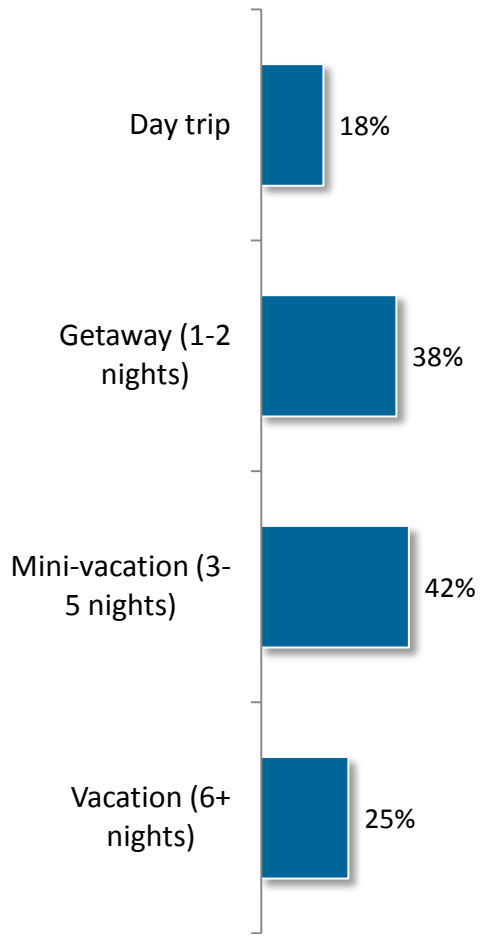
Base: Evaluated VI, n=711.



Future Trips to Vancouver Island

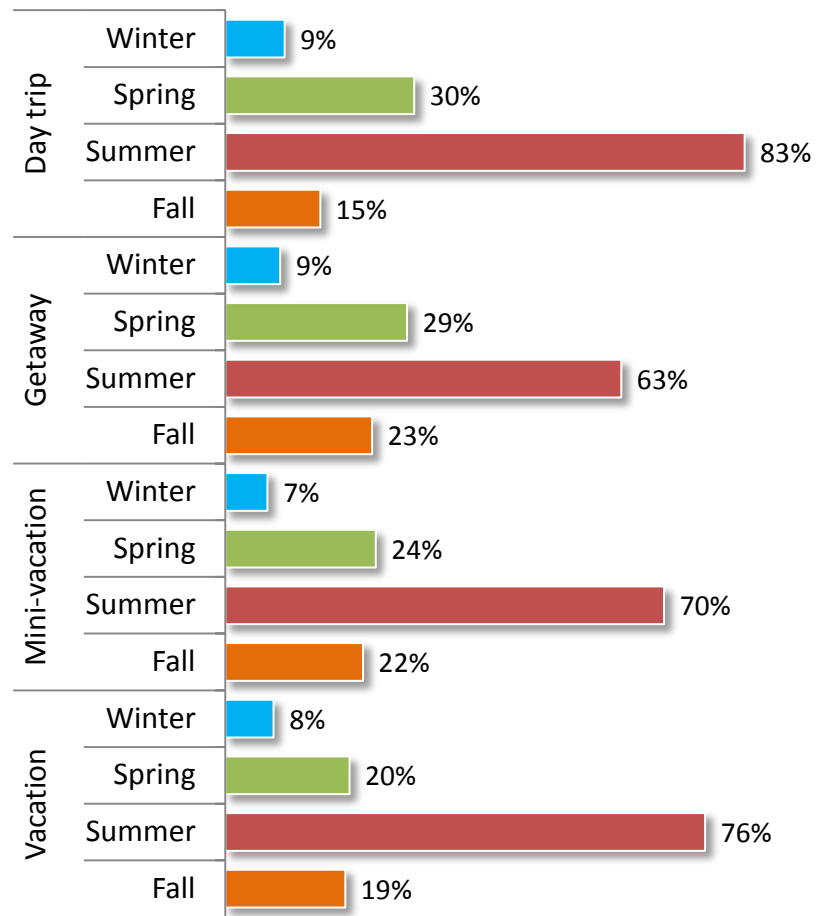
- Over four-in-ten who evaluated VI are likely to take a ‘Mini-vacation’ to that region in the next two years, while 38% say they are likely to take a ‘getaway’, and one-quarter a vacation.
- Most future trips to VI (daytrips in particular) are planned for the summer. Spring is a more popular season for daytrips and getaways to VI than mini-vacations and vacation trips.

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



Base: Evaluated VI, n=711.

Season of Trip by Trip Type



Base: Likely to take trip. Day, n=125, Getaway, n=271, Mini V, n=296, Vacation, n=175.



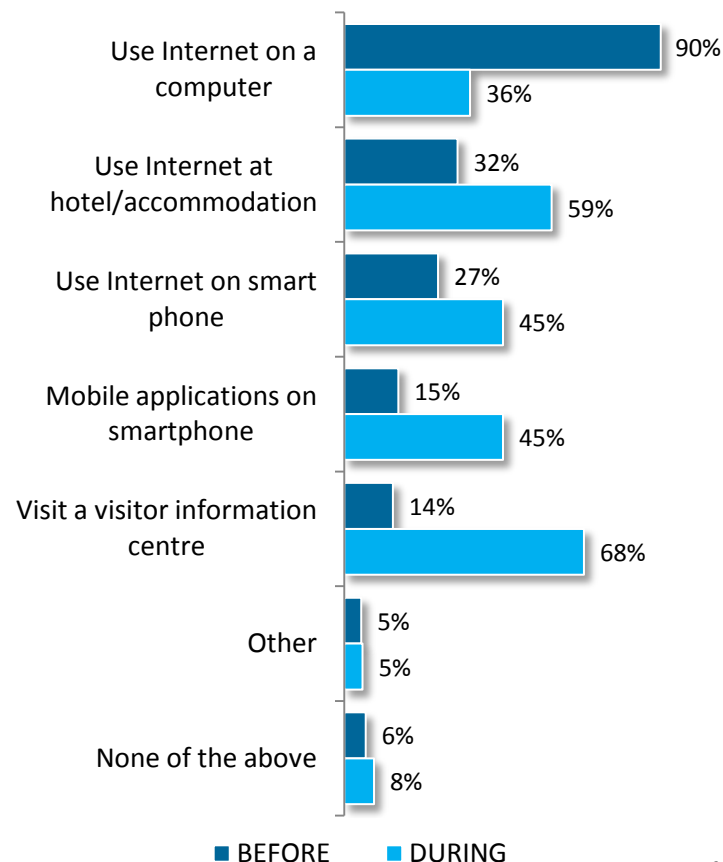
Future Trips to Vancouver Island

- Outdoor recreation activities are a motivator for 44% of those likely to take a trip to VI, 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



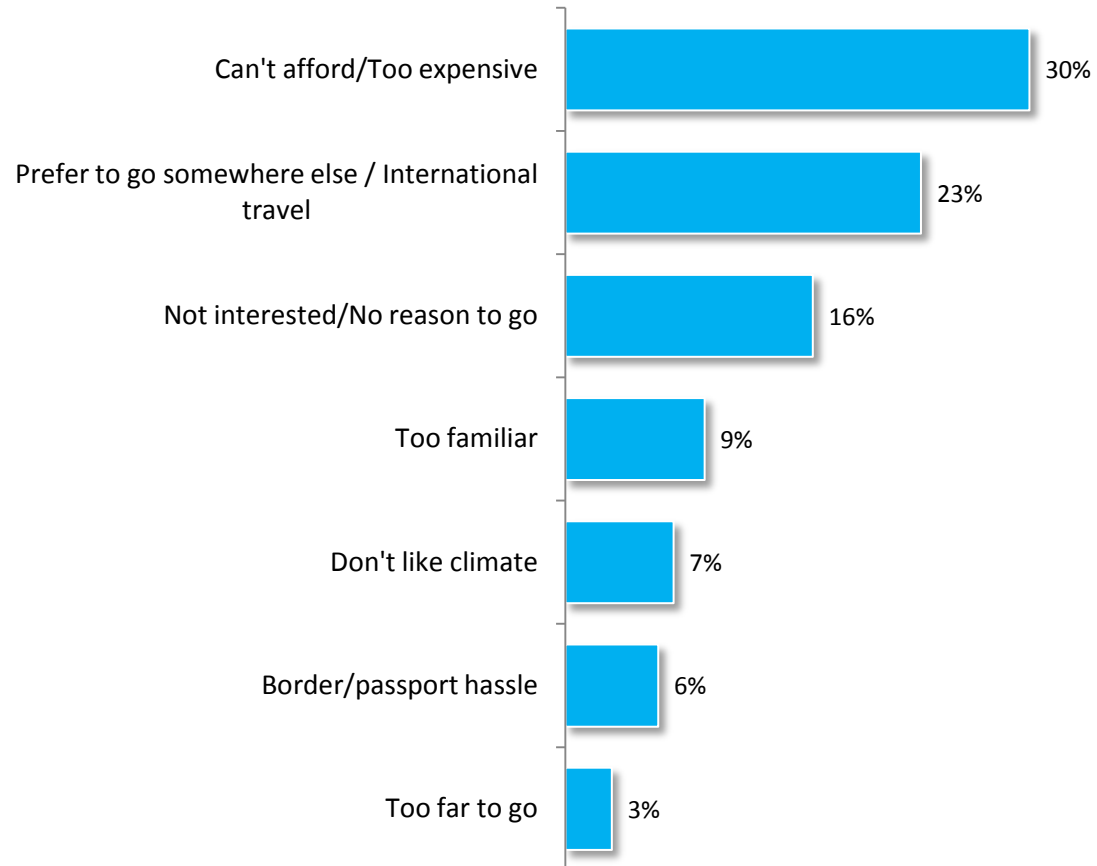
Base (Both charts): Likely to take a trip to VI, n=486.

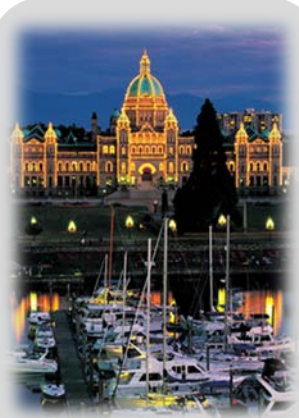


Reasons for being unlikely to visit - VI

- Those not likely to visit Vancouver Island in the next 2 years mentioned costs as being the key barrier (30%), followed by preferring to go to a different/international destination (23%) and not being interested (16%).

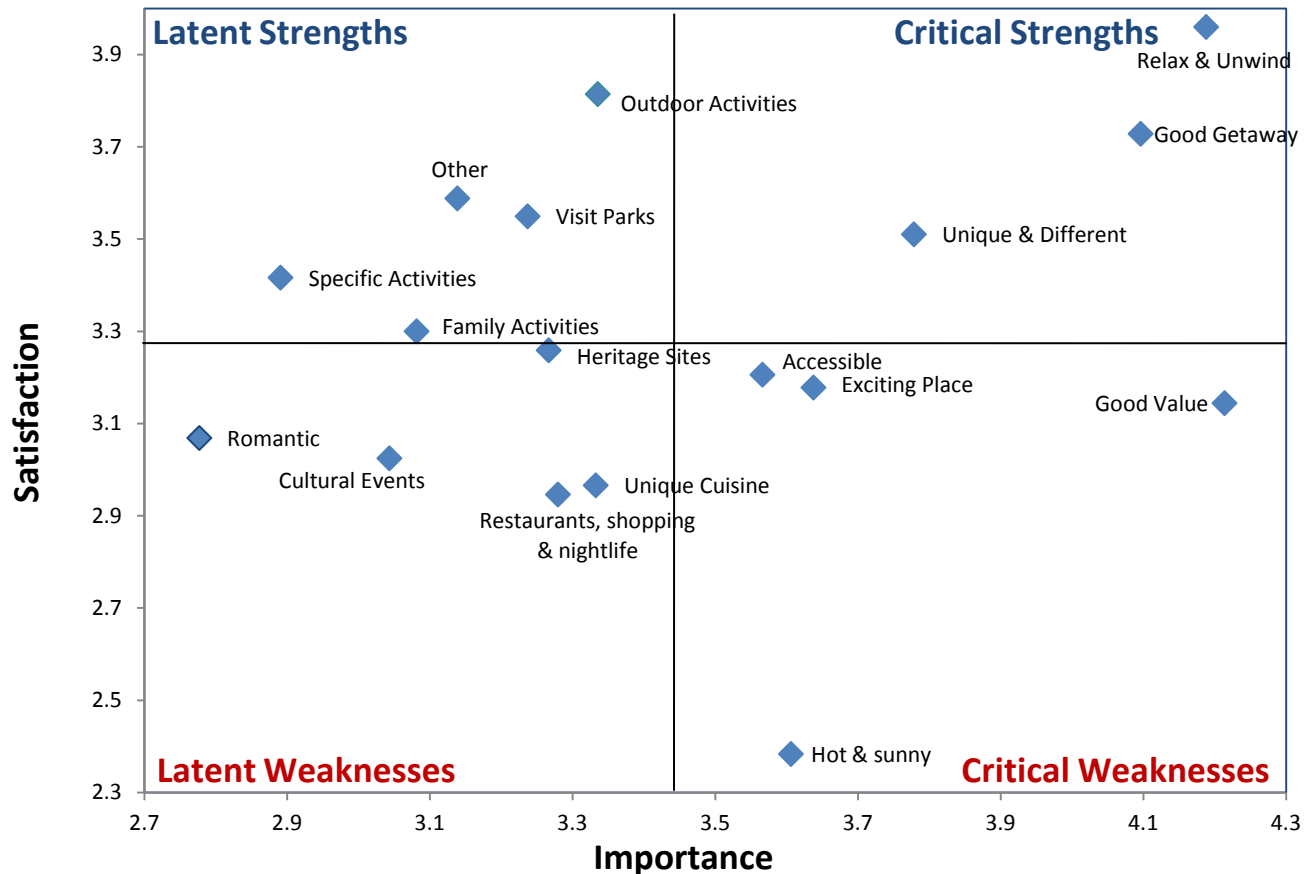
Reasons for being unlikely to visit





Factors Associated with VI – 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 VI. Good value is very important but receives a below average satisfaction rating.
- Outdoor activities, visit national/provincial parks, specific and other activities and family activities are latent strengths for the region.





Factors Associated with Vancouver Island

- Respondents from BC (both Lower Mainland and Other BC residents) associate regions in VI with being accessible, hot and sunny and a place with opportunities to visit parks.
- Residents of Calgary, Edmonton and other Albertan regions are most likely to associate VI with being hot and sunny, a place with opportunities to visit parks, for unique cuisine and heritage and historical sites.
- Greater Seattle residents have a different perception of VI than BC, Albertan and other Western Washington residents. They are more likely to think of VI as being an accessible region that offers a wide range of outdoor activities and the opportunity to visit parks. In contrast, other Western Washington residents perceive VI as being a place with heritage and historical sites and unique cuisine.
- Specific associations are highlighted in the table below:

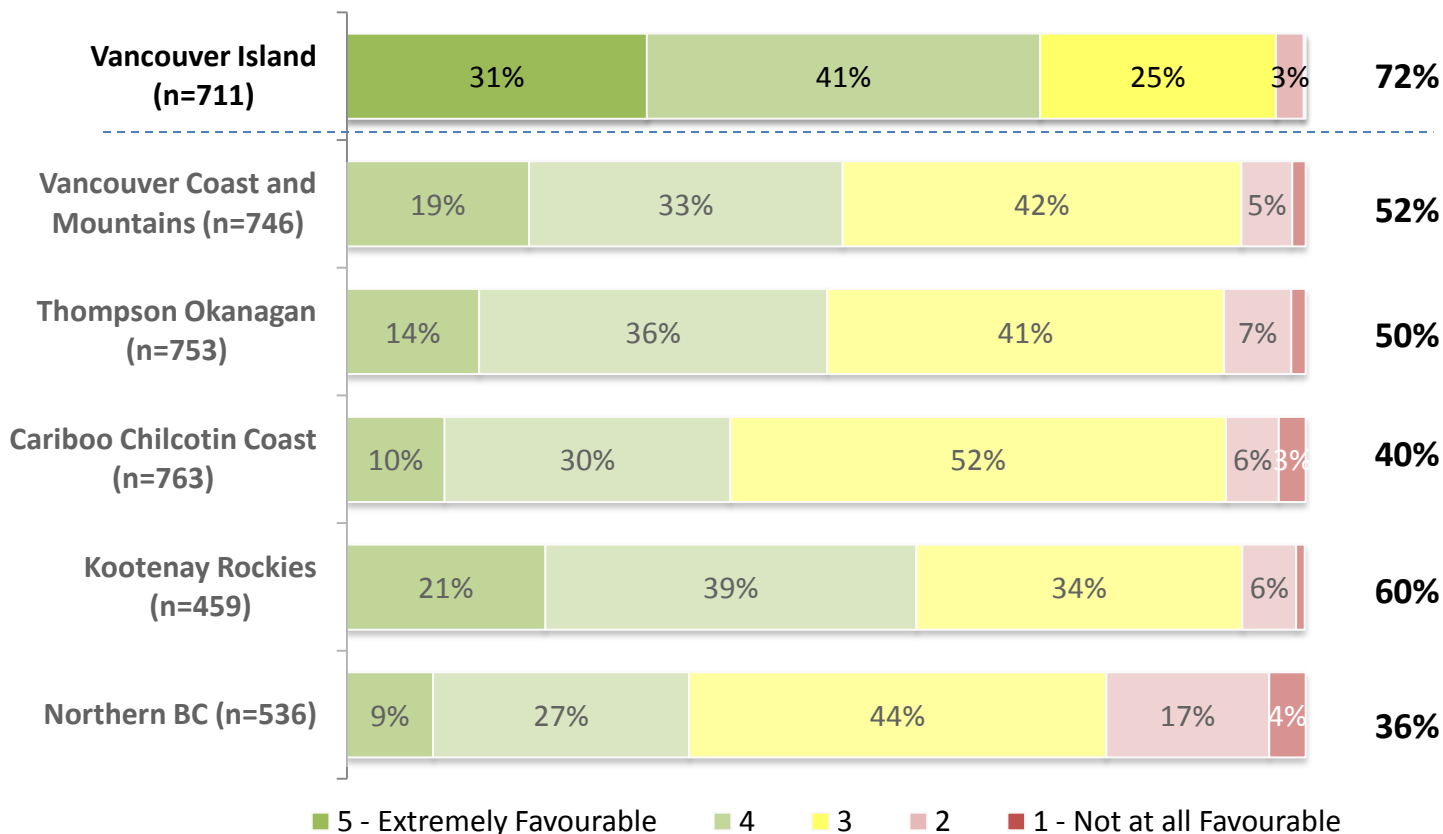
<p>Lower Mainland/ Other BC</p> <ul style="list-style-type: none"> • Accessible • Hot and sunny • A place with opportunities to visit national and provincial or state parks (Visit Parks) 	<p>Calgary/ Edmonton/ Other Alberta</p> <ul style="list-style-type: none"> • Accessible • Hot and Sunny • A place with opportunities to visit national and provincial or state parks (Visit Parks) • Unique Cuisine • Heritage and Historical sites
<p>Other Western Washington</p> <ul style="list-style-type: none"> • Heritage and Historical Sites • Unique Cuisine 	<p>Greater Seattle</p> <ul style="list-style-type: none"> • Offers a wide range of outdoor activities • Accessible



Overall Impressions

- Over seven-in-ten respondents which are familiar with Vancouver Island have a very favourable overall impression of the region. In fact, the overall impression of Vancouver Island is the highest of any BC Tourism region.

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.



Implications to Consider

- Leverage the region's position as the highest-ranking in BC in overall impressions, as well as the high level of familiarity that VI areas have relative to other BC tourism regions, to draw attention to lesser-known areas within the region. Specifically target the Gulf Islands (to BC residents) and areas outside of Victoria (to Alberta and Washington State residents).
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to VI tend to make most decisions about what activities to participate in while on their trip, which places 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. Relative to other regions, Vancouver Island is a popular destination for daytrips and getaways in the spring, which presents an opportunity to increase the number of trips taken and/or the duration of visits during this season.
- Focus promotional material on the key activities which motivate future trips to VI that can be participated in during shoulder seasons.
- Consider using promotional material that targets the different associations the various target populations have with the region. For example, respondents from Alberta are more likely to associate VI with being hot and sunny and a place to visit parks, while Greater Seattle residents consider the region to be accessible and offer a wide range of outdoor activities.
- Address affordability: the key reason for reluctance to take a future trip to the region. Highlight free or inexpensive activities that are available in the region.



Appendix:



Vancouver Island:

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 Island 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 VI



Destination Attributes – Top 2 Box Importance	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Offers good value for money	89.6%	89.6%	88.1%	74.4%		82.3%
A place to relax and unwind	85.6%	83.8%	74.8%	75.6%		78.0%
Serves as a good getaway from everyday life	84.7%	74.5%	69.6%	77.8%		77.0%
Unique and different, feels quite different from home	75.1%	63.3%	59.1%	66.8%		66.4%
Hot and sunny	66.8%	60.0%	58.1%	35.5%		50.0%
An exciting place to be	68.5%	56.7%	56.5%	41.2%		52.4%
Accessible (Easy to get to)	55.8%	72.7%	51.9%	42.9%		49.5%
Offers wide range of outdoor activities	50.8%	38.9%	33.8%	38.4%		39.9%
Unique local cuisine	29.7%	45.7%	46.1%	26.6%		33.5%
Heritage and historical sites	44.1%	35.8%	42.9%	42.7%		42.8%
Opportunities to visit national, provincial or state parks	36.4%	42.6%	39.2%	42.6%		40.2%
Restaurants, shopping and nightlife	32.4%	52.1%	40.3%	37.5%		37.7%
Offers wide range of activities for the entire family	49.7%	42.2%	27.6%	26.5%		32.7%
Offers cultural events such as arts and music	23.9%	29.7%	28.2%	26.4%		26.4%
Offers a specific activity (like ski, golf, fishing etc.)	18.0%	34.6%	23.2%	14.0%		18.3%
Romantic	18.6%	23.3%	18.9%	24.9%		21.7%
Other	61.9%	38.4%	61.5%	44.6%		55.0%
UNWEIGHTED BASE:	75	69	95	93		332



Activities Participated In – VI by Origin

Activities Participated In	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	46.4%	59.7%	62.8%	75.4%		62.7%
Shopping	57.1%	68.2%	65.1%	55.8%		59.5%
Hiking	33.5%	43.7%	39.5%	37.8%		37.3%
Visiting friends, relatives	46.1%	47.7%	52.1%	19.4%		37.8%
Visiting national and/or provincial parks	32.3%	39.4%	46.8%	41.3%		40.2%
Visiting rural community or communities	27.3%	39.7%	37.1%	33.4%		33.0%
Visiting historical sites	16.2%	24.1%	16.0%	28.4%		21.2%
Visiting a large city or cities	25.3%	24.4%	28.8%	19.0%		23.8%
Other outdoor recreation activities	15.2%	22.1%	28.1%	17.8%		20.2%
Fishing	11.6%	16.1%	11.0%	21.5%		15.4%
Visiting a winery	2.7%	12.9%	10.6%	8.6%		7.7%
Arts and cultural activities	14.2%	14.4%	15.9%	13.7%		14.5%
Participated in water sports	6.4%	11.9%	11.5%	15.0%		11.4%
Attended festival or event	7.1%	17.1%	17.1%	14.8%		13.4%
Visited aboriginal culture or heritage sites	7.1%	13.3%	7.9%	6.9%		7.6%
Biking	10.3%	10.3%	5.4%	11.5%		9.4%
Golf	3.8%	9.0%	8.9%	4.5%		5.8%
Whale watching	8.5%	12.2%	19.5%	14.4%		14.0%
Watching sporting events	4.4%	5.7%	0.4%	4.6%		3.4%
Skiing or snowboarding	6.8%	3.7%	3.0%	5.9%		5.2%
Participated in sporting events	8.0%	5.3%	0.8%	4.9%		4.6%
None of the above	3.3%	2.7%	0.0%	0.0%		1.1%
UNWEIGHTED BASE:	157	158	146	120		581



Activities Which Motivated Trips – VI by Origin

Motivating Activities	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	24.3%	29.1%	34.8%	48.2%		36.5%
Shopping	8.1%	12.0%	13.1%	9.6%		10.3%
Hiking	9.0%	10.8%	11.6%	6.3%		8.8%
Visiting friends, relatives	39.4%	37.1%	43.7%	18.6%		32.6%
Visiting national and/or provincial parks	7.4%	8.3%	17.7%	18.0%		14.4%
Visiting rural community or communities	8.9%	5.7%	13.8%	13.9%		12.0%
Visiting historical sites	2.8%	2.6%	5.1%	10.4%		6.3%
Visiting a large city or cities	2.1%	2.0%	8.2%	4.5%		4.7%
Other outdoor recreation activities	1.9%	9.2%	12.1%	12.2%		9.0%
Fishing	5.0%	6.9%	6.0%	7.2%		6.2%
Visiting a winery	1.4%	2.5%	4.1%	3.3%		2.9%
Arts and cultural activities	2.6%	2.6%	5.7%	1.2%		2.9%
Participated in water sports	0.0%	6.2%	4.1%	8.1%		4.6%
Attended festival or event	1.4%	3.3%	3.2%	8.1%		4.5%
Visited aboriginal culture or heritage sites	1.7%	4.4%	2.2%	1.9%		2.0%
Biking	2.8%	1.2%	1.2%	1.8%		1.9%
Golf	2.9%	5.7%	3.4%	3.1%		3.3%
Whale watching	2.6%	2.7%	9.4%	7.4%		6.3%
Watching sporting events	2.9%	1.8%	0.0%	0.8%		1.2%
Skiing or snowboarding	0.5%	0.5%	2.0%	4.0%		2.2%
Participated in sporting events	5.9%	1.7%	0.8%	1.0%		2.4%
None of the above	15.4%	16.7%	0.0%	0.0%		5.3%
UNWEIGHTED BASE:	157	158	146	120		581

Participation vs. Motivation – VI 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	46%	24%	60%	29%	63%	35%	75%	48%			63%	37%
Shopping	57%	8%	68%	12%	65%	13%	56%	10%			60%	10%
Hiking	34%	9%	44%	11%	40%	12%	38%	6%			37%	9%
Visiting friends, relatives	46%	39%	48%	37%	52%	44%	19%	19%			38%	33%
Visiting national and/or provincial parks	32%	7%	39%	8%	47%	18%	41%	18%			40%	14%
Visiting rural community or communities	27%	9%	40%	6%	37%	14%	33%	14%			33%	12%
Visiting historical sites	16%	3%	24%	3%	16%	5%	28%	10%			21%	6%
Visiting a large city or cities	25%	2%	24%	2%	29%	8%	19%	5%			24%	5%
Other outdoor recreation activities	15%	2%	22%	9%	28%	12%	18%	12%			20%	9%
Fishing	12%	5%	16%	7%	11%	6%	22%	7%			15%	6%
Visiting a winery	3%	1%	13%	3%	11%	4%	9%	3%			8%	3%
Arts and cultural activities	14%	3%	14%	3%	16%	6%	14%	1%			15%	3%
Participated in water sports	6%	0%	12%	6%	12%	4%	15%	8%			11%	5%
Attended festival or event	7%	1%	17%	3%	17%	3%	15%	8%			13%	5%
Visited aboriginal culture or heritage sites	7%	2%	13%	4%	8%	2%	7%	2%			8%	2%
Biking	10%	3%	10%	1%	5%	1%	12%	2%			9%	2%
Golf	4%	3%	9%	6%	9%	3%	5%	3%			6%	3%
Whale watching	9%	3%	12%	3%	20%	9%	14%	7%			14%	6%
Watching sporting events	4%	3%	6%	2%	0%	0%	5%	1%			3%	1%
Skiing or snowboarding	7%	1%	4%	1%	3%	2%	6%	4%			5%	2%
Participated in sporting events	8%	6%	5%	2%	1%	1%	5%	1%			5%	2%
None of the above	3%	15%	3%	17%	0%	0%	0%	0%			1%	5%
UNWEIGHTED BASE:	157		158		146		120				581	



Likelihood of taking a trip – VI 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	30.1%	50.7%	10.0%	11.8%		17.5%
Getaway (1-2 nights)	44.7%	53.9%	17.1%	46.7%		38.1%
Mini-vacation (3-5 nights)	37.8%	41.2%	57.0%	33.4%		41.6%
Vacation (6+ nights)	11.4%	28.3%	50.1%	14.7%		24.6%
UNWEIGHTED BASE:	166	162	162	156		646



Activities Motivating Future Trips – VI 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.	43.0%	68.0%	40.1%	45.0%		44.1%
A trip to experience scenery and nature	28.2%	25.9%	20.1%	36.5%		28.9%
A trip to relax/unwind/rest	29.1%	24.4%	23.4%	27.3%		26.4%
A trip to visit family/friends	26.2%	24.7%	20.1%	4.0%		15.4%
A trip to visit national and/or provincial parks	2.5%	4.1%	5.8%	4.1%		4.2%
A trip to experience restaurants and night life	6.5%	4.9%	2.3%	9.6%		6.4%
A skiing or snowboarding trip	0.6%	2.2%	1.7%	2.2%		1.7%
A trip to visit historical sites	2.8%	0.7%	20.0%	2.8%		7.9%
A trip to visit cities	8.2%	8.4%	2.9%	2.1%		4.2%
A trip to see arts and cultural activities	1.2%	2.0%	1.7%	1.2%		1.4%
A romantic getaway	1.0%	2.1%	0.0%	2.1%		1.2%
A trip to experience aboriginal culture and heritage	0.0%	0.7%	1.5%	0.0%		0.5%
A trip to experience multi-cultural life	0.0%	0.0%	0.0%	0.0%		0.0%
Other	5.2%	5.2%	18.9%	0.3%		7.4%
None	2.5%	1.5%	0.0%	1.2%		1.2%
UNWEIGHTED BASE:	117	126	106	106		455



Reasons for Being Unlikely to Visit – VI 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	15.3%	14.5%	14.3%	17.7%		16.2%
Prefer to go somewhere else / International travel	4.0%	18.4%	40.5%	24.3%		23.2%
Can't afford/Too expensive	64.2%	42.1%	29.1%	12.3%		30.1%
Too far to go	1.4%	4.3%	7.3%	0.6%		2.6%
Don't like climate	1.4%	0.0%	3.0%	12.6%		7.1%
Don't have the time	2.1%	2.0%	3.6%	1.5%		2.2%
Too familiar	6.0%	6.1%	8.9%	10.8%		9.0%
Border/passport hassle	0.0%	0.0%	0.0%	11.9%		5.6%
Haven't thought about it	0.0%	0.0%	0.0%	0.0%		0.0%
Hard to get to	1.4%	5.1%	0.0%	4.0%		2.4%
Health issues	0.0%	0.0%	1.5%	1.5%		1.1%
Already live there	0.0%	5.8%	0.0%	0.0%		0.2%
Other	3.1%	1.9%	0.0%	0.0%		0.8%
Don't know	7.3%	16.7%	0.0%	14.4%		9.2%
UNWEIGHTED BASE:	49	36	56	50		191



Timing of Trip Planning – VI 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	84.1%	84.5%	88.6%	94.4%		89.6%
	Use Internet on smart phone	25.3%	28.3%	21.5%	31.0%		26.5%
	Use Internet at hotel/accommodation	20.1%	26.2%	45.5%	30.0%		32.0%
	Mobile applications on smartphone	17.8%	19.7%	13.3%	14.7%		15.3%
	Visit a visitor information centre	16.7%	14.5%	9.7%	15.0%		13.8%
	Other	4.1%	3.3%	5.1%	5.1%		4.8%
	None of the above	11.7%	8.1%	5.9%	2.3%		6.0%
During	Visit a visitor information centre	54.6%	61.1%	69.4%	75.7%		67.8%
	Use Internet at hotel/accommodation	42.6%	52.5%	62.5%	66.6%		58.7%
	Mobile applications on smartphone	26.7%	33.5%	54.4%	50.4%		44.9%
	Use Internet on smart phone	31.9%	31.3%	46.3%	53.6%		44.9%
	Use Internet on a computer	26.0%	32.2%	46.0%	34.1%		35.6%
	Other	3.5%	2.6%	8.2%	4.2%		5.2%
	None of the above	16.8%	13.5%	4.8%	5.2%		8.4%
	UNWEIGHTED BASE:	117	126	106	106		455