

TOURISM VANCOUVER ISLAND & CONSOLIDATED COMMUNITY RESULTS

2018 CONSUMER RESEARCH
CO-OP PROGRAM



TOURISM
VANCOUVER
ISLAND

MESSAGE FROM TOURISM VANCOUVER ISLAND

Following three years of conducting consumer research on a Regional level, TVI developed a program to assist communities in measuring consumer awareness, desirability and Net Promoter Score in the same consistent, reliable and repeatable way.

This program uses best practice consumer research methods by randomly sampling residents in key target markets (BC and Alberta) to determine critical consumer considerations along various stages of the path to purchase.

This research provides reliable and comparable data enabling communities to identify consumer concerns along the path to purchase and target efforts to enhance effectiveness in areas that could use improvement. It also creates the ability for communities to establish key benchmarks and track the performance of tactics over time.

The team at Tourism Vancouver Island would like to sincerely thank the DMOs who made this inaugural collaborative effort possible.

METHODOLOGY

Overview

This report represents findings from telephone surveys of N=1000 residents of British Columbia and N=1000 residents of Alberta conducted by Oraclepoll.

Study Sample

The margin of error for the surveys is $\pm 3.1\%$, 19/20 times.

Survey Method

All surveys were conducted by telephone using live operators at the Oraclepoll call centre facility. The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. The random database was inclusive of new numbers, private numbers and cell phone only households. A total of 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised 100%. Interviews were completed between the days of January 12th and January 19th, 2018.

Logistics

Initial calls were made between the hours of 5 p.m. and 9 p.m. within each time zone. Subsequent call backs of no-answers and busy numbers were made on a (staggered) daily rotating basis up to 5 times (from 10 a.m. to 9 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.

RESEARCH PROGRAM GOALS

Increase the economic benefits of tourism to the Vancouver Island Region

Ensure the relevance of the tourism sector to Vancouver Island businesses, government agencies and residents

Align Vancouver Island Region consumer research initiatives with industry best practice

Supply communities with reliable and comparable measurements of consumer awareness, desirability and Net Promoter Score (NPS)

WHERE IS THE VALUE?

This high-value consumer research allows for CDMOs in the Vancouver Island Region to track key stages that the visitor experiences along the consumer path to purchase in a repeatable and comparable way.

Tracking awareness, desirability, and Net Promoter Score (NPS) is critical to understanding consumer sentiments, developing effective marketing campaigns, supporting destination development activities and tracking the success of a destination marketing/management organization.

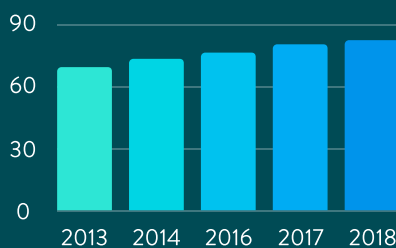
TOURISM
VANCOUVER
ISLAND

AWARENESS & DESIRABILITY

VANCOUVER ISLAND REGION

BRITISH COLUMBIA SAMPLE EXECUTIVE SUMMARY

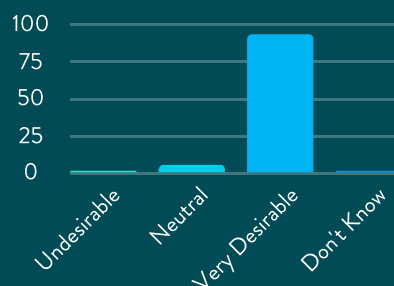
Q. Do you think of Vancouver Island in British Columbia as a place to visit for an overnight leisure trip



More than eight in ten British Columbia residents surveyed or 82% (N=816) stated that Vancouver Island is a place to visit for an overnight trip, up +2% compared to the previous 2017 survey period, 17% do not and 1% were unsure.

Vancouver Island residents were most inclined to hold this opinion (97%), followed by those residing in Greater Vancouver (83%) and then the rest of BC (72%). Older and higher income residents also tended to feel that the area is an overnight destination. A total of 87% of those 55+ consider it an overnight spot for tourists, followed by 83% of those aged 35-54 and then 75% of 18-34-year olds. In addition, 88% of income earners in the over \$75,000 range said the same, next by 83% of respondents in the \$50,000 - \$75,000 cohort and 72% in the under \$50,000 bracket.

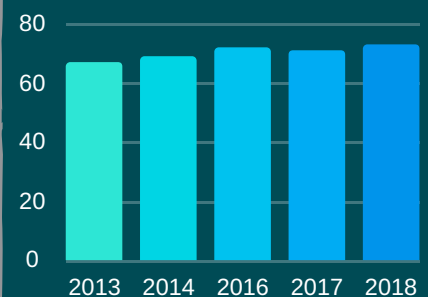
Q. Using a scale from 1 being not at all desirable to 5 being very desirable please rate how desirable you consider Vancouver Island in British Columbia to be as a place for an overnight leisure trip



The 82% of respondents that said they consider Vancouver Island as a place for an overnight leisure trip were asked to rate the

Most of BC residents that consider Vancouver Island as a place to visit for an overnight trip, continue to rate it very high in terms of desirability. A total of 93% rated the area as desirable (33%) or very desirable (60%), only 1% undesirable, 5% had a neutral opinion (neither desirable nor undesirable), while 1% were unsure. This year's desirable score is slightly (+2%) higher than the 91% in 2017 and the 90% in each of 2016, 2015 and 2014.

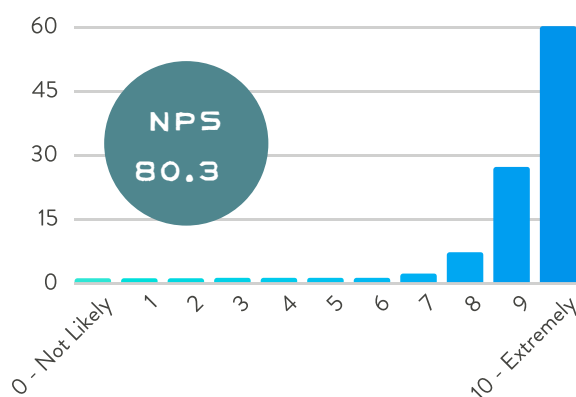
Q. Have you taken an overnight leisure trip on Vancouver Island in British Columbia in the past two years



The 82% of respondents that said they consider Vancouver Island as a place for an overnight leisure trip were then asked about any recent trips that they have taken to the area in the last two years.

A total of 73% of those interviewed claimed that they have taken an overnight trip to Vancouver Island in the past two years, similar findings in relation to the previous two survey periods. Visitors most tended to be residents of Vancouver Island (85%) and Greater Vancouver (73%) compared to other regions in BC (63%). In addition, those most likely to have visited were 55 and older (75%) and 35 to 54 (74%), compared to younger respondents 18 to 34 (68%). As well, higher earners in the over \$75,000 cohort (80%), followed by the \$50,000 - \$75,000 range (67%) were more likely to have visited in relation to those in the under \$50,000 bracket (59%).

Q. How likely are you to recommend Vancouver Island British Columbia as a travel destination to a friend, family member or colleague? Please respond using a scale from '0' being not at all likely to '10' extremely likely



The 82% of respondents that consider Vancouver Island as a place for an overnight leisure trip were then asked about their likelihood to recommend the area as a travel destination.

In total, 94% of BC residents provided a combined likely rating of 8-10 (92% in 2017 & 90% in 2016) for recommending Vancouver Island as a travel destination. There were 3% that gave a 6-7 score (3% in 2017 & 3% in 2016), 2% a 3-5 rating (3% in 2017 & 4% in 2016) and only 1% an unlikely mark of 0-2 (2% in 2017 & 4% in 2016).

The overnight visitors were then asked to rate their level of satisfaction with the experience and services provided during their most recent leisure trip. A strong 95% majority provided a satisfied (21%) or very satisfied rating (74%), as did 94% in 2017, 93% in 2016 and 94% in 2014. Only 1% in this survey accorded a dissatisfied score (1 & 2), while 4% gave a neutral rating (3).

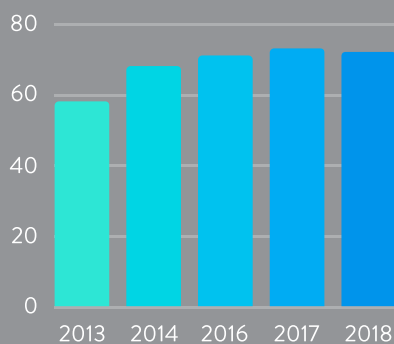
The 82% of respondents that consider Vancouver Island as a place for an overnight leisure voyage were questioned about their future travel plans to the area over the course of the next two years. In total, 44% claimed that they will travel to the area one or two times (40% in 2017), 23% three to five times (24% in 2017) and 15% more than five times (15% in 2017). A total of 14% do not plan to visit, slightly lower than the 15% in 2017 and 4% were unsure (6% in 2017).

AWARENESS & DESIRABILITY

VANCOUVER ISLAND REGION

ALBERTA SAMPLE EXECUTIVE SUMMARY

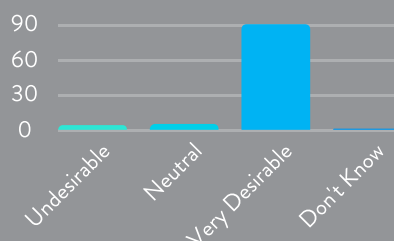
Q. Do you think of Vancouver Island in British Columbia as a place to visit for an overnight leisure trip



In total, 72% of Albertans interviewed said that they think of Vancouver Island in British Columbia as an overnight leisure destination, revealing consistent results over the past three survey touchpoints. There were 25% that do not consider Vancouver Island a place to visit and 3% that were unsure.

Those most likely to consider the area as a destination were higher income earners in the over \$75,000 cohort (76%), older residents 55+ (79%) and slightly more females (73%) compared to males (71%).

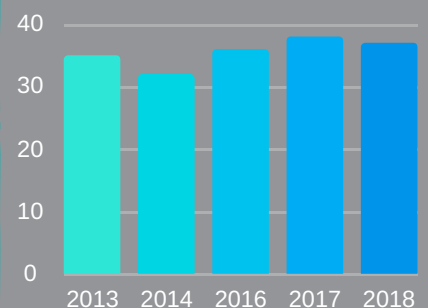
Q. Using a scale from 1 being not at all desirable to 5 being very desirable please rate how desirable you consider Vancouver Island in British Columbia to be as a place for an overnight leisure trip



The 72% of respondents that said they consider Vancouver Island as a place for an overnight leisure trip were asked to rate the area in terms of desirability for an overnight voyage.

Ninety percent rated Vancouver Island as a 4-desirable (39%) or 5-very desirable (51%) place to visit for an overnight trip, the highest rating recorded over the five survey periods. In the previous 2017 survey, a total of 86% rated the area as a desirable or very desirable location for an overnight stay, up from 81% in 2016, and 80% in both 2014 and 2013.

Q. Have you taken an overnight leisure trip on Vancouver Island in British Columbia in the past two years



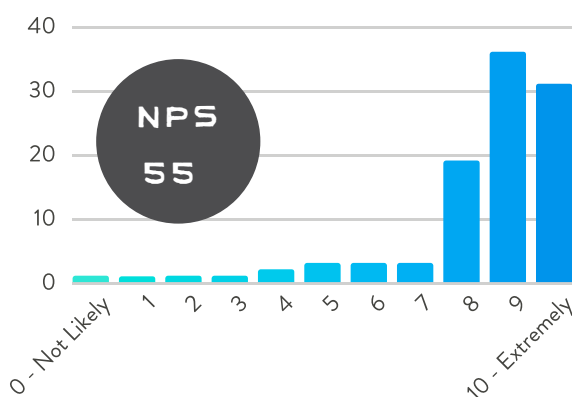
The 72% of respondents that consider the Island as a place for an overnight leisure stay were questioned about their recent past trips to the area.

37% of Alberta residents asked claimed they have taken an overnight trip to Vancouver Island within the past 24 months, a similar finding to results from the previous two polls. Respondents 55+ (44%) and 35 to 54 (37%) were more likely to have visited than those 18 to 34 (28%). In addition, those earning more than \$75,000 per annum (41%) and \$50,000-\$75,000 (39%) were more likely to have visited in relation to lower earners in the under \$50,000 bracket (14%).

Overnight visitors were then asked to rate their level of satisfaction with the experience and services provided during their most recent leisure trip. A very high 95% provided a satisfied (43%) or very satisfied (52%) rating, only 2% were dissatisfied and 3% neither satisfied nor dissatisfied. Results in this survey are the strongest across the survey periods, as in 2017 92% accorded a satisfied or very satisfied score, 89% in 2016 and 91% in 2014.

The 73% of respondents that consider the area a place for an overnight leisure stay were also questioned about their future travel plans to the Island in the next two years. Most named by 45% was one or two trips (42% in 2017), while 4% stated three to five stays (3% in 2017) and 2% more than five (2% in 2017). There were 43% that said they do not plan a trip (46% in 2017) and 6% were unsure (7% in 2017).

Q. How likely are you to recommend Vancouver Island British Columbia as a travel destination to a friend, family member or colleague? Please respond using a scale from '0' being not at all likely to '10' extremely likely



Finally, the 72% of respondents that consider Vancouver Island as a place for an overnight leisure trip were asked about their likelihood to recommend the area as a travel destination.

When grouping responses, 88% provided a very likely rating of 8-10 (83% in 2017 & 80% in 2016) and 6% a score from 6-7 (8% in 2017 & 8% in 2016). A lesser 6% accorded an unlikely rating from 3-5 (6% in 2017 & 8% in 2016) and only 2% a very unlikely mark of 0-2 (4% in 2017 & 4% in 2016).

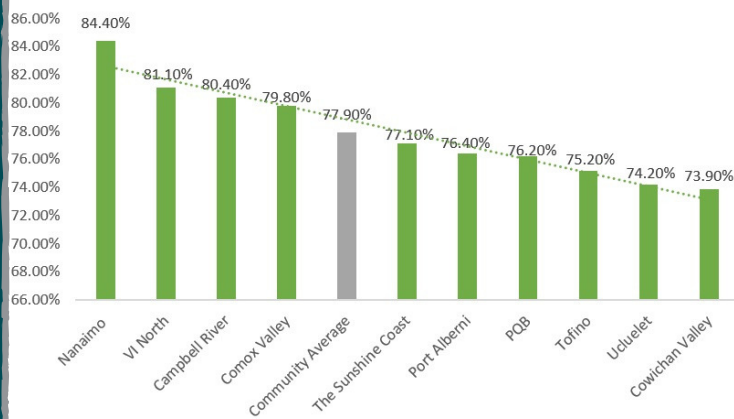
AWARENESS & DESIRABILITY

COMMUNITY COMPARISON

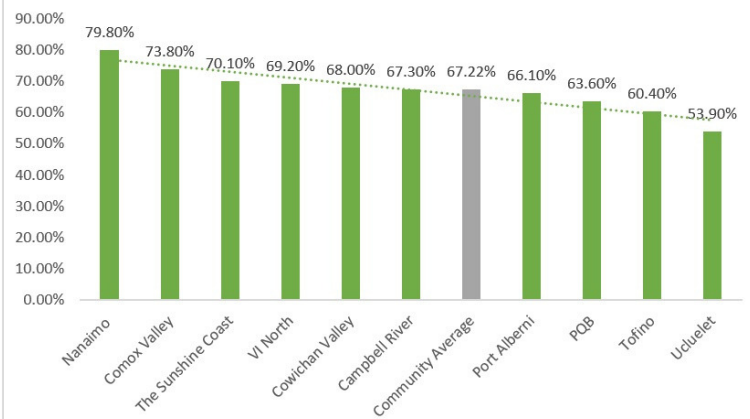
Q1. Do you think of (community) in British Columbia as a place to visit for an overnight leisure trip?

The first question was asked to determine consumer awareness of the community as a tourism destination. Any of the respondents that answered "no" or "don't know" to this question were not asked questions 2 or 3.

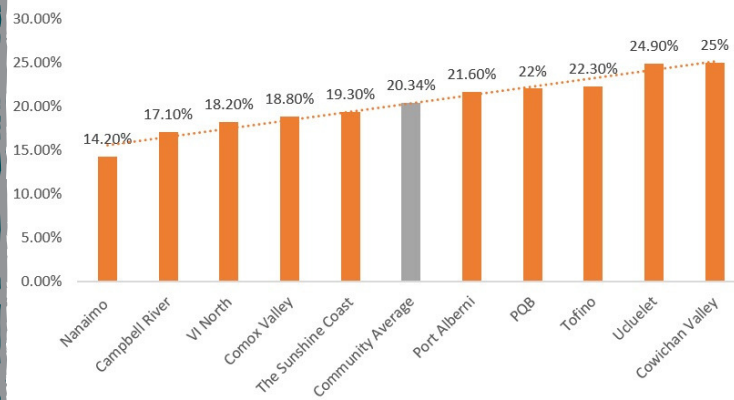
BC - Q1 "Yes"



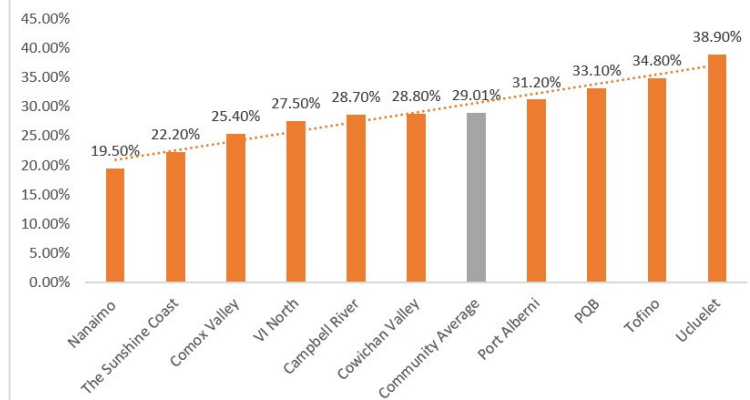
Alberta - Q1 "Yes"



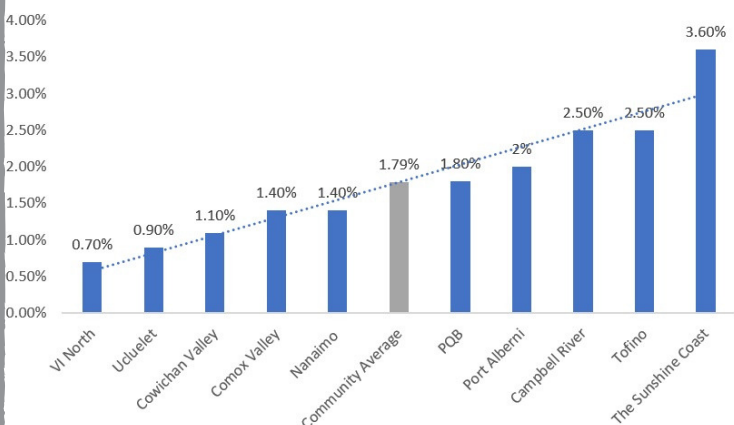
BC - Q1 "No"



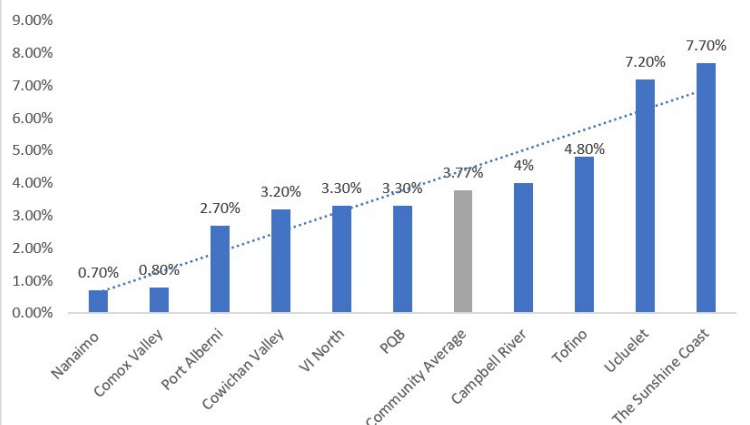
Alberta - Q1 "No"



BC - Q1 "Don't Know"



Alberta - Q1 "Don't Know"

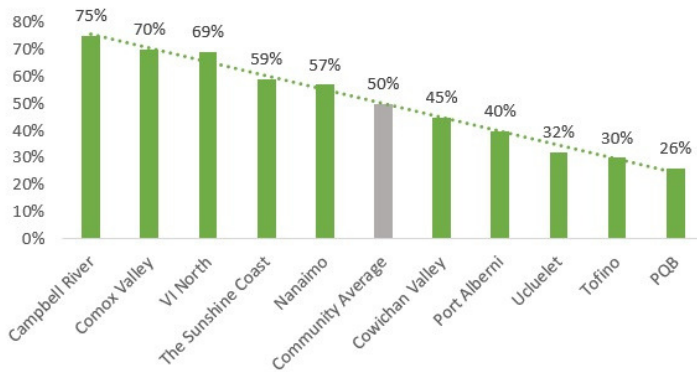


AWARENESS & DESIRABILITY

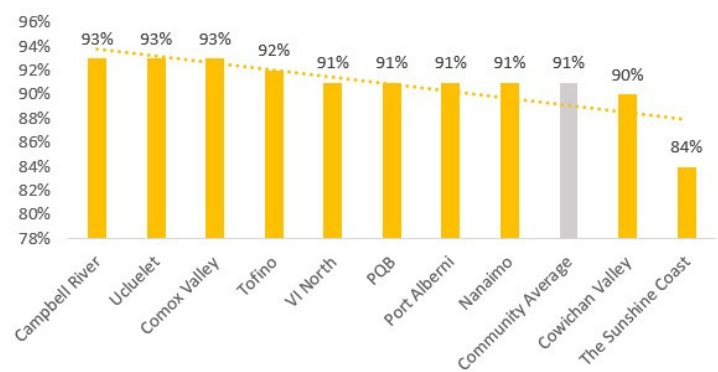
COMMUNITY COMPARISON

Q2. Using a scale from 1 being not at all desirable to 5 being very desirable please rate how desirable you consider (community) in British Columbia to be as a place for an overnight leisure trip in the (season).

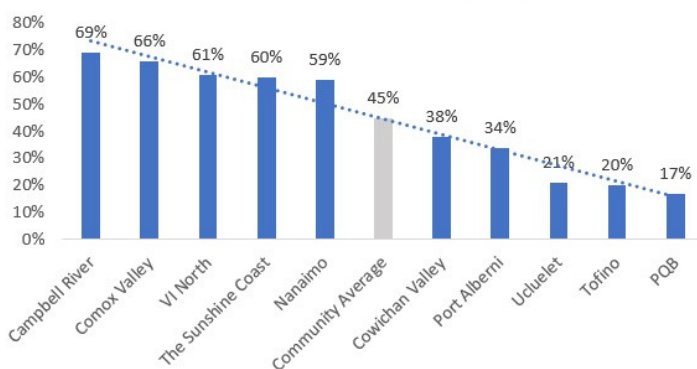
BC - Spring - Desirable (4 & 5)



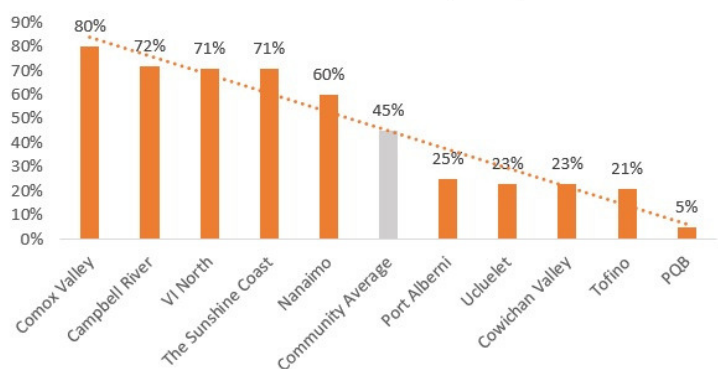
BC - Summer - Desirable (4 & 5)



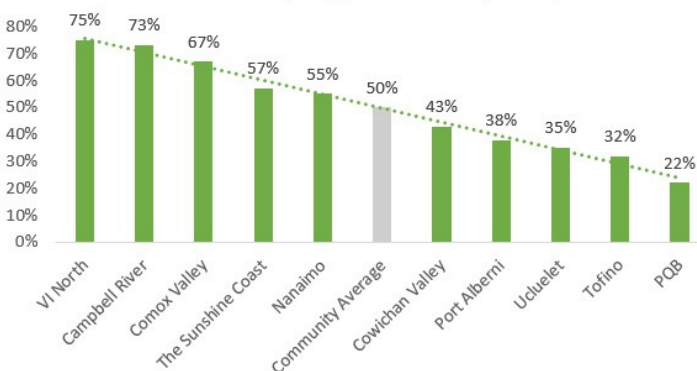
BC - Winter - Desirable (4 & 5)



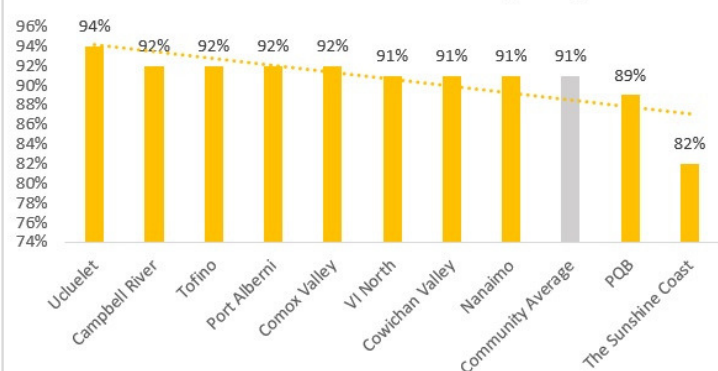
BC - Fall - Desirable (4 & 5)



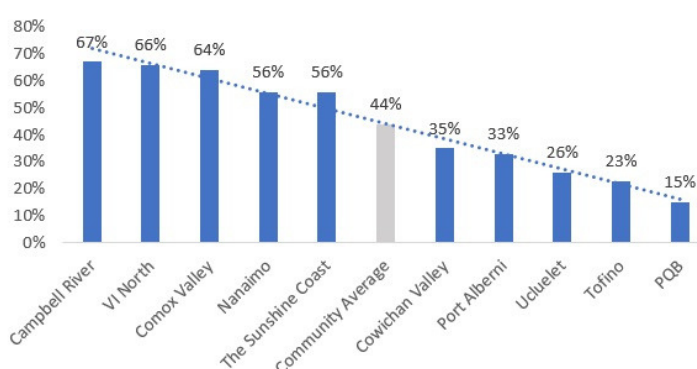
Alberta - Spring - Desirable (4 & 5)



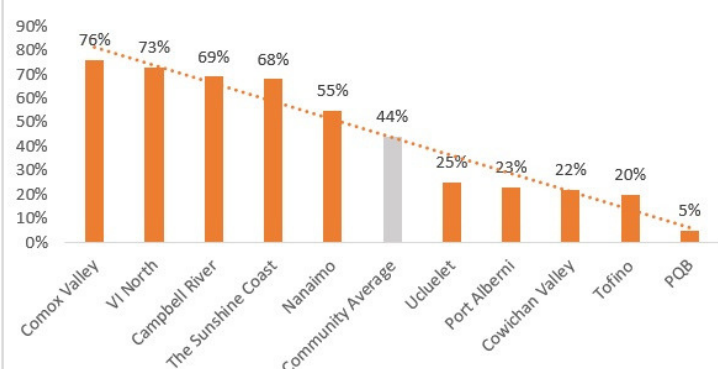
Alberta - Summer - Desirable (4 & 5)



Alberta - Winter - Desirable (4 & 5)



Alberta - Fall - Desirable (4 & 5)

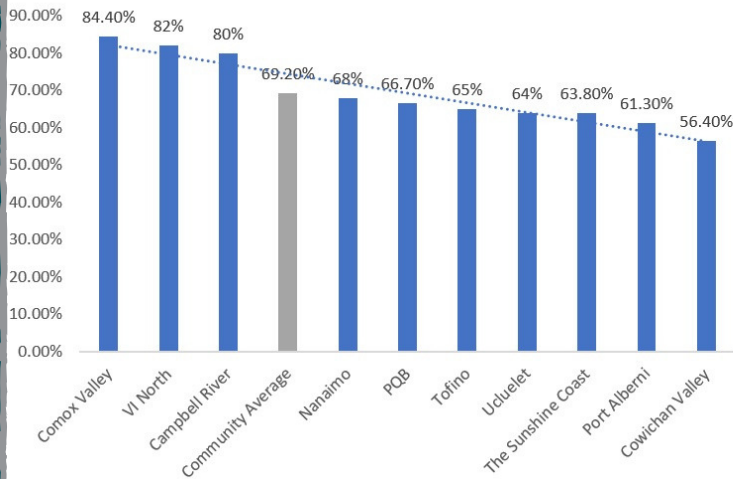


AWARENESS & DESIRABILITY

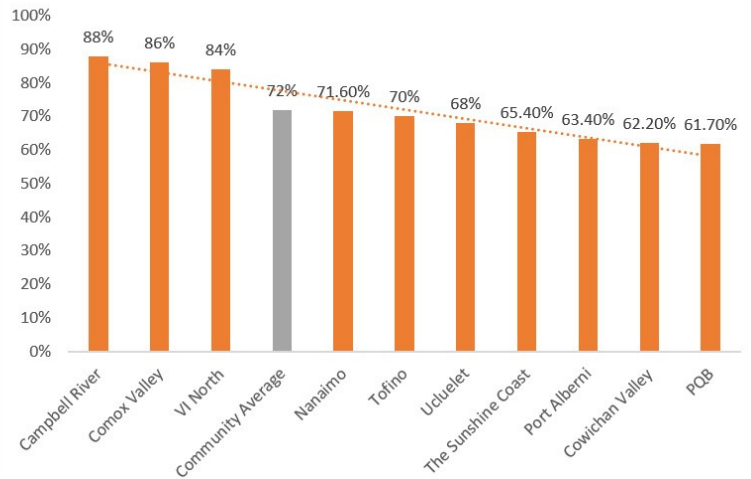
COMMUNITY COMPARISON

Q3. How likely are you to recommend (community) as a travel destination to a friend, family member or colleague? Please respond using a scale from "0" being not at all likely to "10" "extremely likely".

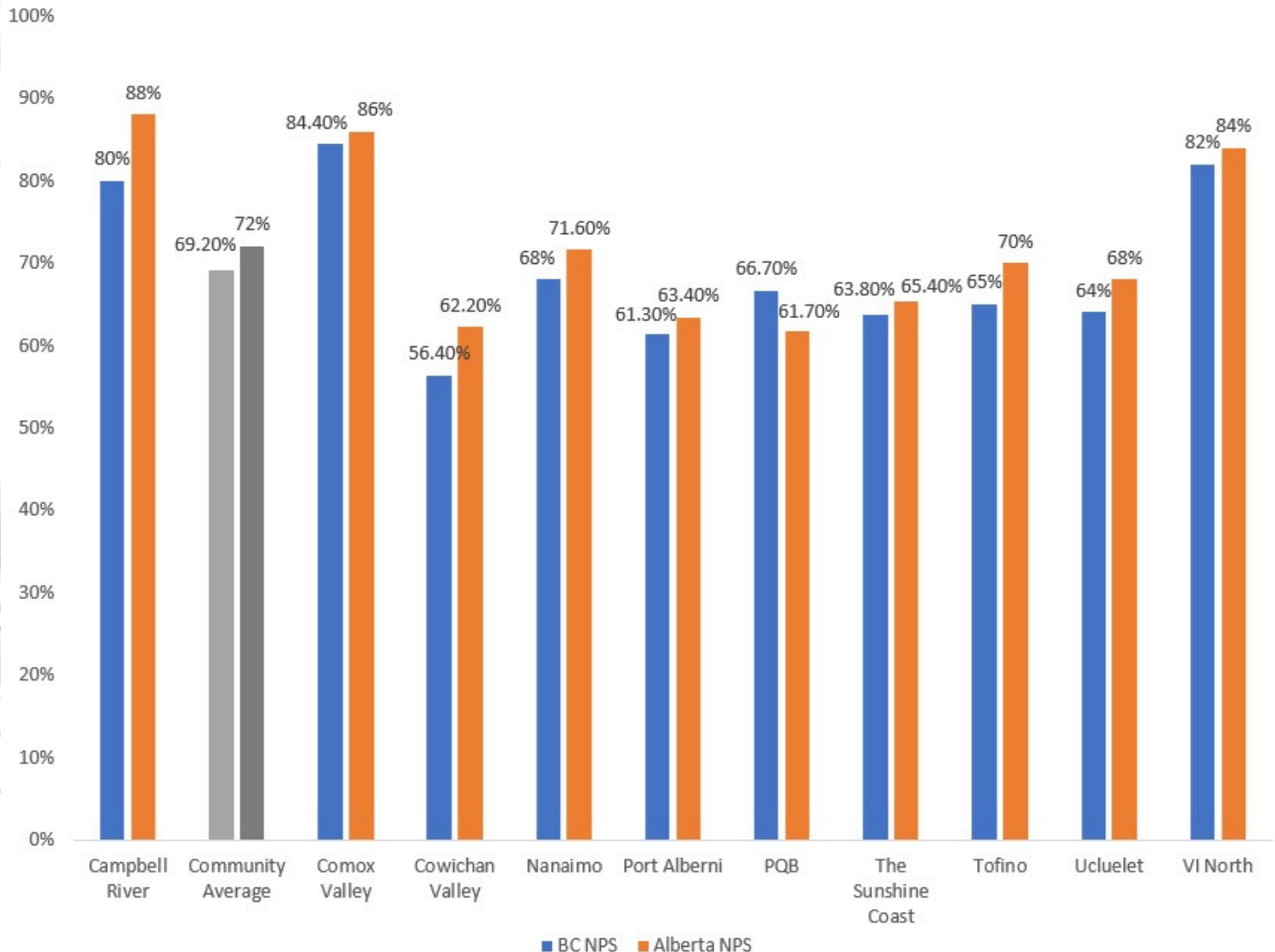
BC - Q3 - NPS



Alberta - Q3 - NPS



NPS By Community - BC vs. Alberta



CONSUMER RESEARCH PROGRAM PILOT REVIEW AND LEARNINGS

This consumer research project aimed to facilitate collaboration, encourage the pooling community resources, and create a more thorough, aligned and effective approach to conducting research. It was encouraging to see so many communities from across the island participate in this inaugural research pilot.

The goal of this research was to provide CDMOs with information and data that would support business planning, the creation of consumer marketing campaigns, stakeholder engagement efforts, destination development activities, and ultimately, encourage greater alignment and research collaboration across the communities in the region.

The survey used was designed to track awareness, desirability and Net Promoter Score, as these elements are key to understanding consumer sentiments.

□ Question 1 was intended to determine awareness of the community as a tourism destination – potential visitors must be aware of a destination in order to move down the path to purchasing a vacation. This measurement allows CDMOs to track awareness of their community in their key target markets.

□ Question 2 was intended to determine desirability of the community destination by season – potential visitors are more likely to advance down the path to purchasing a vacation when they consider a community as a desirable place for a leisure trip.

□ Question 3 was intended to determine Net Promoter Score (NPS) – a benchmark and measurement tool favoured by Destination BC, NPS measures how likely visitors are to recommend the destination to family, friends and coworkers.

Survey participants were also asked questions to identify demographic traits (age, income and gender). All of the raw data collected was provided to each respective community to allow for further analysis and segmentation.

Limitations

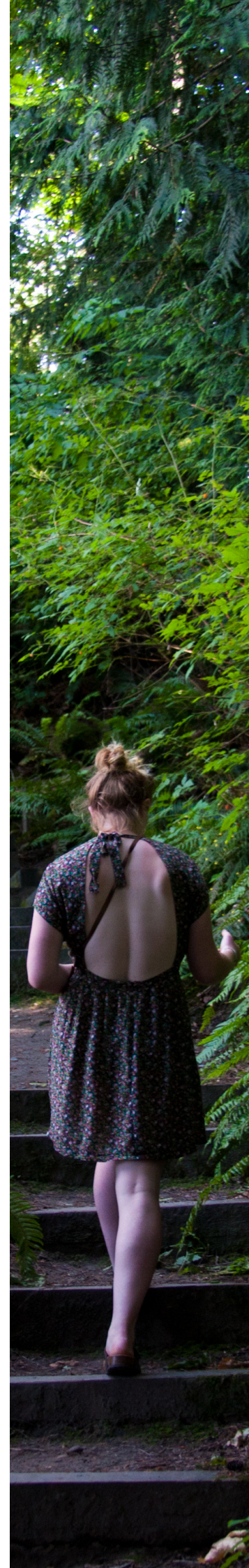
While this pilot research project was successful in many respects, there are limitations associated with the research methodology and opportunities for improvement. Oracle Poll, the contracted research firm, did not ask respondents if they had actually visited a community before asking the NPS specific question "How likely are you to recommend (community) as a travel destination to a friend, family member or colleague"? As a result, the NPS that this project captured is based on respondent perception of a community rather than on an actual recent experience. This omission was consistent across all communities participating in the study. While the information obtained is valuable in terms of perception, it will not be possible to create benchmarks for NPS this year.

Opportunities

The limitation in relation to the NPS did however present an opportunity for future studies. A question asking whether survey participants have recently been to the community will be added immediately after question 2, so that both perceived and actual NPS can be determined. Tracking both perceived and actual NPS will offer additional insight into the dynamic between, and the effectiveness of, marketing efforts in target markets compared to actual in market experiences.

It was also determined that there would be significant value in creating a subsequent question list for those who answered "no" or "don't know" to question 1, to gain additional insight into why target consumers may not consider the community to be a tourism destination (i.e. is it a lack of awareness of the community in general, is it a lack of awareness of the destination and its offerings, does the respondent have a bias aversion unrelated to and/or not addressable by the community itself, etc.). The inclusion of such questions should not result in an additional cost, as long as it does not exceed the number of subsequent questions asked when a respondent answers "yes".

There is also opportunity to create additional questions to further segment and better understand respondents NPS sentiments (i.e. ask them to rate specific "themes" such as affordability, beaches, shopping, food & beverage, wildlife, art & culture, etc.) to better understand the perceptions of promoters, detractors and neutrals.



The background of the entire page is a photograph of ocean waves, rendered in a monochromatic blue and teal color scheme. The waves are in motion, creating a textured, rippling effect across the frame.

TOURISM VANCOUVER ISLAND

HAVE QUESTIONS?

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