



TOURISM VICTORIA

2013 BRAND TRACKER

AUGUST 1, 2013



TOURISM
VICTORIA 

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OBJECTIVES

1. Identify destination decision criteria and relative importance of each one

2. Determine Victoria's strengths & weaknesses as compared to competitive destinations

3. Assess sources of inspiration for taking a vacation

4. Profile travellers' behaviours and attitudes related to travel purchases and preferences

5. Measure travellers' media habits to inform marketing strategy

Where possible, measures are tracked to the 2011 baseline study.

METHODOLOGY

15-minute online
survey

800 completed
surveys

Margin of error*:
+/-3.5%

Fielded between
July 2 and 9, 2013

Target Respondents

Vancouver (400n)
Seattle (200n)
Calgary (200n)

Have taken overnight
trip in past 2 years or
likely to take one in
next 2 years to
Victoria

Likely to spend
\$250+ per adult on
next vacation

Between ages of 25
and 65 years

*Note: As base size decreases, margin of error increases

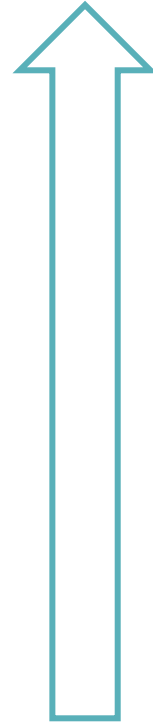
KEY FINDINGS AND RECOMMENDATIONS

KEY FINDINGS & RECOMMENDATIONS

Potential Victoria market grew:

from **2.14M** in 2011

to **2.74M** in 2013



Victoria's potential visitor market is growing and points to a positive trend for tourism to the city.

- Recent/potential visitors has grown in Seattle, Vancouver and Calgary.
- Victoria continues to be attractive to travellers without children across a broad age range.
- Those who are adventurous and enjoy the outdoors are the most drawn to Victoria as a travel destination.

KEY FINDINGS & RECOMMENDATIONS



Continue to target Seattle.

- Seattle still represents the bulk of Victoria's recent and potential visitors because of its large population.
- While past 2 year visitation is down, this has created a larger untapped market of likely future visitors. It is critical for Victoria to reach this audience.
 - The decline is confirmed with both survey results and historical border crossings into BC. The USA Border crossings have not recovered since dropping in the mid 2000s.
- With familiarity down as well (not surprising as fewer have visited), education is critical.
- Also, despite slowly improving economic conditions in the USA the strong Canadian dollar remains a barrier. As such, promotions/deals will play a big part in motivating visitation from Seattle.

KEY FINDINGS & RECOMMENDATIONS



Vancouver residents are the low hanging fruit and a big proportion of Victoria's visitors. As a market it has risen in importance.

- This growth in the total potential market for Victoria since 2011 is largely driven by Vancouver.
- Significantly more Vancouver residents are recent or potential Victoria visitors this year.
- The proportion of Vancouver residents who recently visited Victoria is at a record high and now surpasses that of Seattle (which took the top spot in 2011).
- There is an opportunity to draw new and repeat visitors from Vancouver since they show stronger interest in Victoria this year, coupled with easier access (no border, more ferries) and no concerns about exchange rates.

KEY FINDINGS & RECOMMENDATIONS

Overall, destinations will need to deliver more in order to satisfy travellers.

- All travel factors are rated as more important (many significantly so) in 2013 compared to 2011.
- This hints that travellers are becoming more demanding of destinations and it may be more difficult to please them. Victoria will need to provide even more proof points to attract and satisfy travellers going forward.

KEY FINDINGS & RECOMMENDATIONS

Victoria should continue leveraging its strength of offering a relaxing atmosphere.

- This attribute is significantly more important to travellers when choosing a vacation destination this year compared to 2011, and Victoria is the only destination that can claim its relaxing atmosphere to be a competitive strength.
- There is a clear opportunity for Victoria to differentiate in its marketing.
- In addition, Victoria's heritage and walkability are secondary strengths to leverage.

Negative perceptions of Victoria's affordability and accessibility still exist and need to be addressed despite some improvement since 2011.

- Same as in 2011, affordability and accessibility hold a lot of weight for travellers when deciding on a destination, and they are still competitive disadvantages of Victoria.
- Although Victoria made some directional gains for affordability and accessibility perceptions this year, more efforts are needed to continue to move the needle. Convenience of ferries and special price discounts need to be emphasized.

KEY FINDINGS & RECOMMENDATIONS

Focus on strengthening perceptions of Victoria's restaurants.

- Restaurants are playing a larger role in the travel industry today compared to 2011:
 1. Being well known for restaurants is significantly more important as a travel decision criteria this year;
 2. There is an increase in proportion of “foodies” compared to 2011; and,
 3. On an unaided basis, travellers tell us restaurants and dining inspire travel.
- For Victoria, this is especially critical since restaurants are a perceived competitive weakness. There is an opportunity to better communicate and showcase Victoria's restaurants.



KEY FINDINGS & RECOMMENDATIONS

Seattle and Vancouver are strong competitors for Victoria; finding ways to further differentiate is critical.

- Seattle and Vancouver boast many strengths, including being well-known for its restaurants and having a vibrant nightlife which are competitive weaknesses of Victoria.
- These destinations also share some strengths with Victoria (such as emphasizing its heritage, having a variety of museums/galleries and having marine/wildlife viewing opportunities). This threatens Victoria's ability to differentiate.
- Going forward, Victoria may face greater challenges if perceptions of Seattle and Vancouver continue to improve. Victoria must find more avenues to distinguish its offerings against Seattle and Vancouver.

KEY FINDINGS & RECOMMENDATIONS

Word of mouth is critical, and social media plays a role.

- Friends and family are major influencers of travel. Unaided inspiration for travel are:
 - Travelling for the purposes of visiting friends and family
 - Travelling because of friends/family recommendations
 - The opportunity to travel with friends/family
- It follows that social media plays a key role for travel. Online review websites, social media and blogs are all strong influencers of travel.
- Continuing to invest time and resources in social media will help bolster perceptions of Victoria.



KEY FINDINGS & RECOMMENDATIONS

Victoria should continue focusing on integrated marketing campaigns to inspire and motivate travellers.

- Word of mouth is the top influencer of travel among a broad audience. Other than that, travellers use a variety of sources to inform their decisions.
- For instance, social media and other online sources, magazine articles and television shows all have an impact travel decisions.

DETAILED FINDINGS

LEGEND

Where possible, 2013 measures are tracked to the 2011 baseline study.
The following symbols are used to indicate if changes are significantly different.



— Significantly **higher** than 2011.



— Significantly **lower** than 2011.

DETAILED FINDINGS: MARKET OVERVIEW

THE MARKET: 2.74M TRAVELLERS

REFERS TO
PEOPLE WHO...

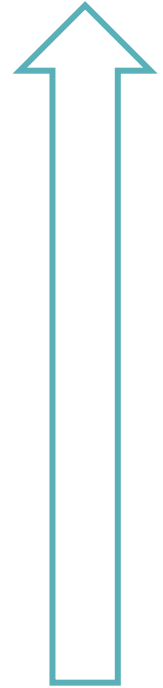
Visited Victoria in
past 2 years or
would visit in
next 2 years

Would spent at
least \$250 per
adult

In 2013, the
market size is **~2.74M**

In 2011, the
market size was **~2.14M**

Potential market for Victoria increased by 28% over
the past two years.



THE MARKET

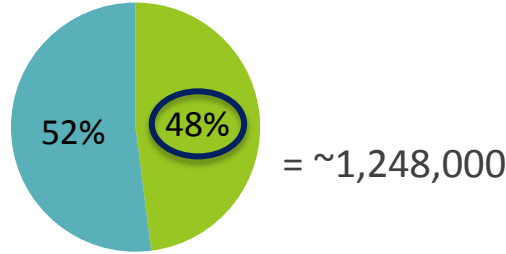
Recent or Potential Visitor Non-Visitor



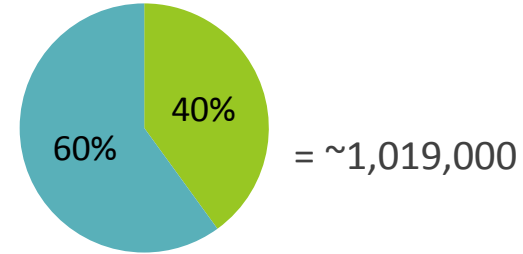
SEATTLE

2013: 2.6M residents
2011: 2.5M residents

2013



2011



(+/-)
From 2011

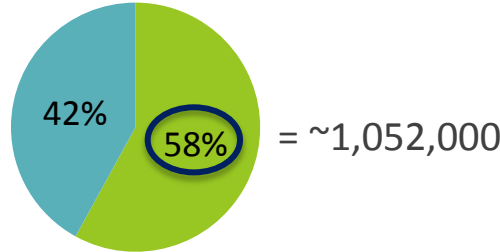
+8



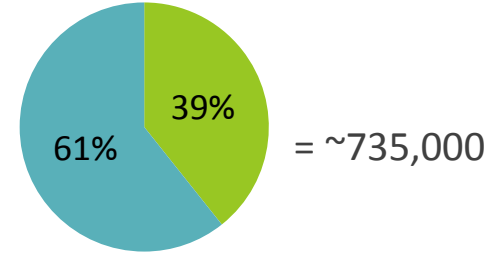
VANCOUVER

2013: 1.8M residents
2011: 1.9M residents

2013



2011



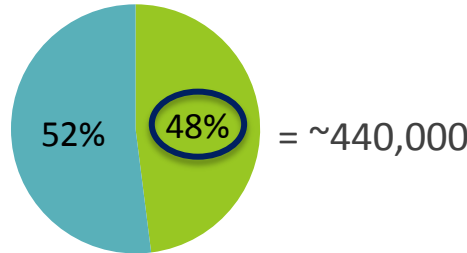
+19



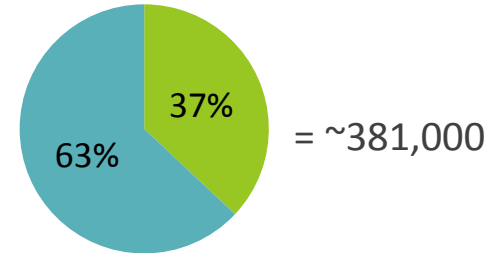
CALGARY

2013: 0.9M residents
2011: 1.0M residents

2013



2011

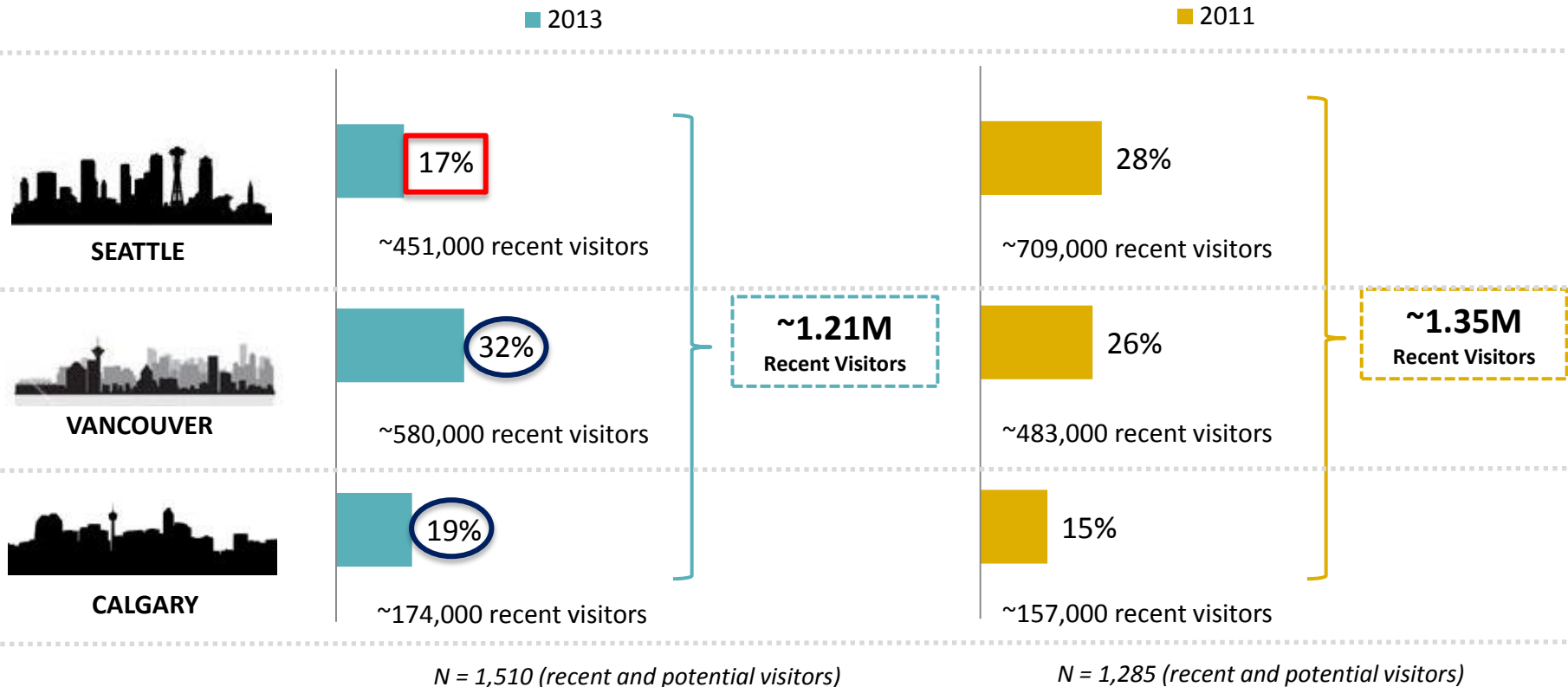


+11

N = 1,510 (recent and potential visitors)

N = 1,285 (recent and potential visitors)

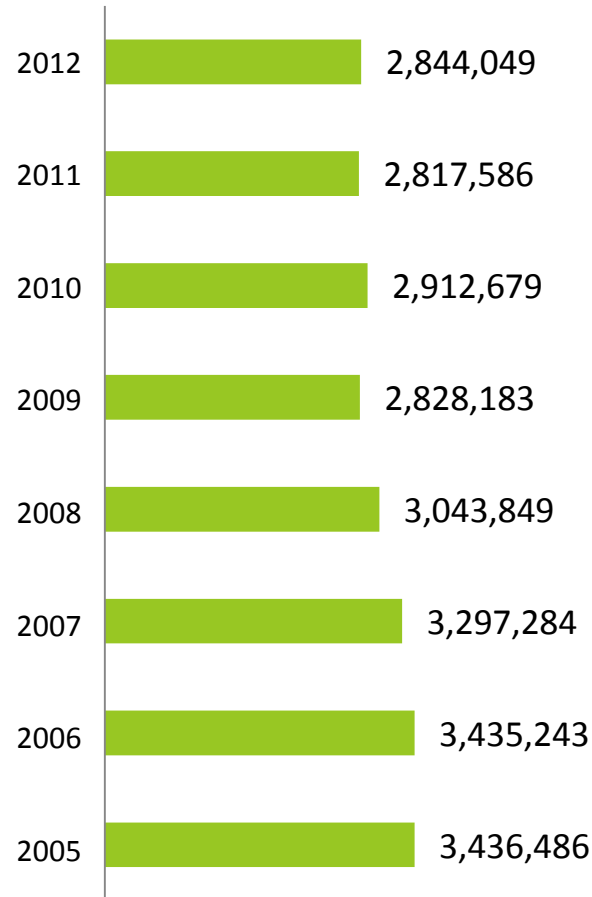
RECENT VISITATION TO VICTORIA (PAST 2 YEARS)



The bulk of Victoria's recent visitors shifted from Seattle residents to Vancouver residents.

US TOURISTS ENTERING BC

Statistics Canada also shows a downward trend of American tourists visiting north of the border since 2005.



NEXT TWO YEAR GROWTH OPPORTUNITY

Untapped visitors have doubled from 790K in 2011.

$$\sim 2.74\text{M} - \sim 1.21\text{M} = \sim 1.53\text{M}$$

Recent and potential visitors

Recent visitors

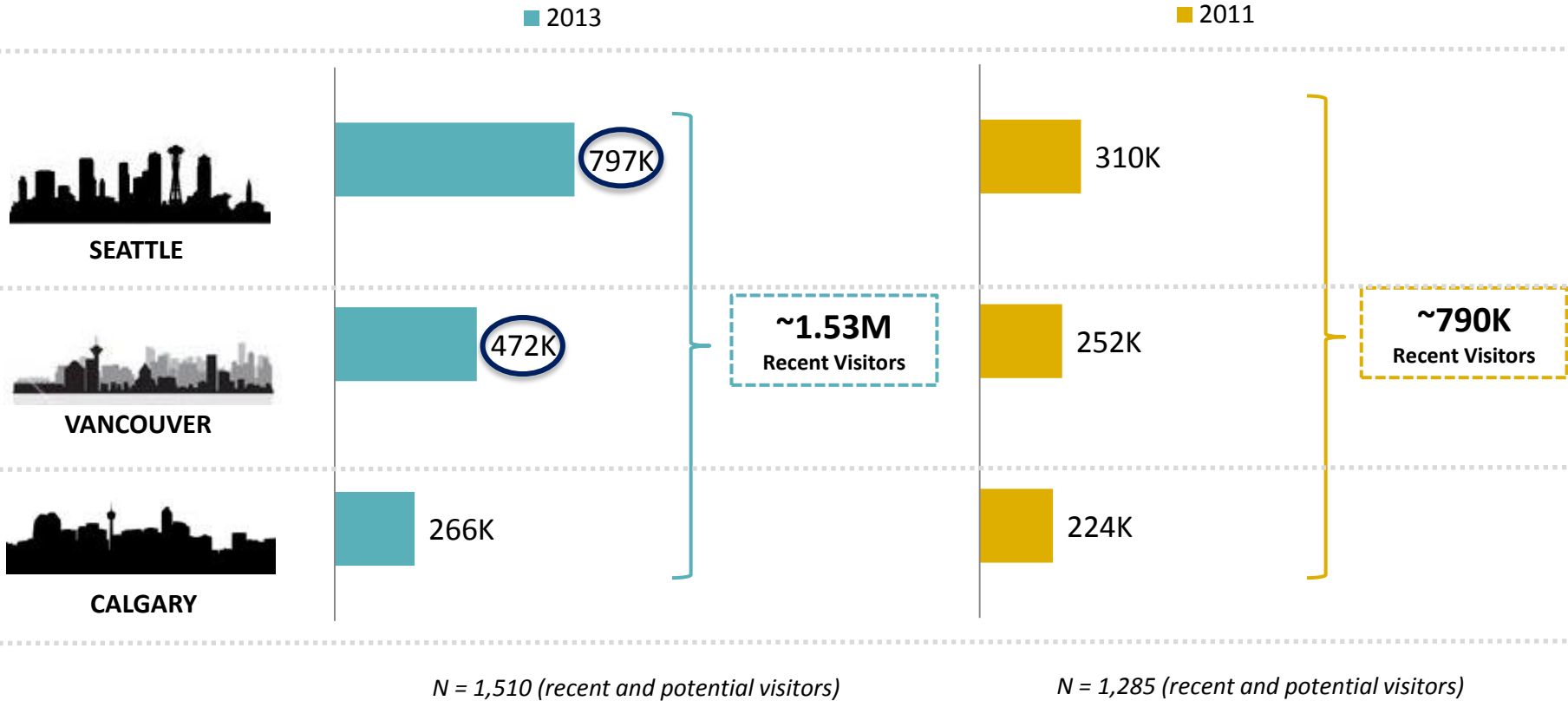
Untapped Visitors

Have visited Victoria
in past two years or
would likely visit in
next 2 years.

Have visited Victoria
in past two years

**Likely visitors in next
two years but have not
visited recently. Aim to
convert to actual
visitation.**

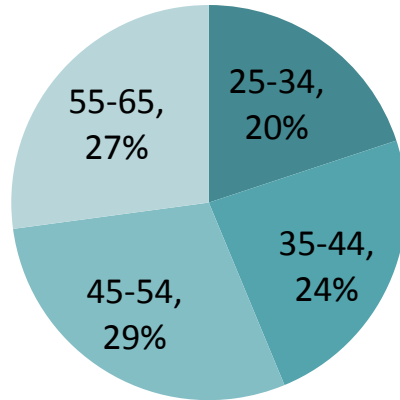
NEXT TWO YEAR GROWTH OPPORTUNITY



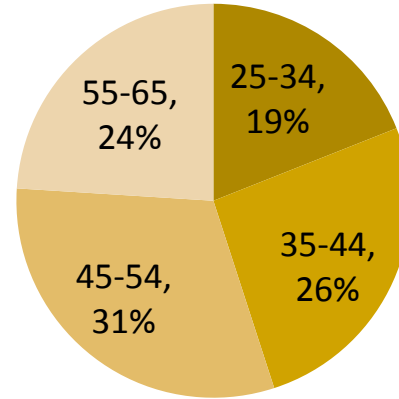
PROFILE OF VICTORIA'S MOST LIKELY VISITORS

AGE

2013



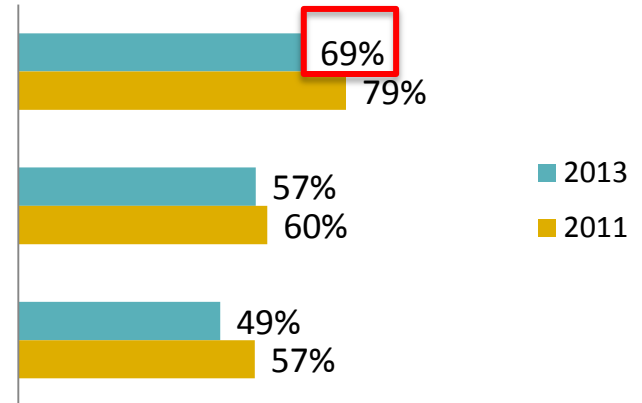
2011



Victoria continues to appeal to a wide age range, and attract those who do not have kids and have taken a trip to Victoria before.

Have no kids at home
Have visited Victoria before

Are women



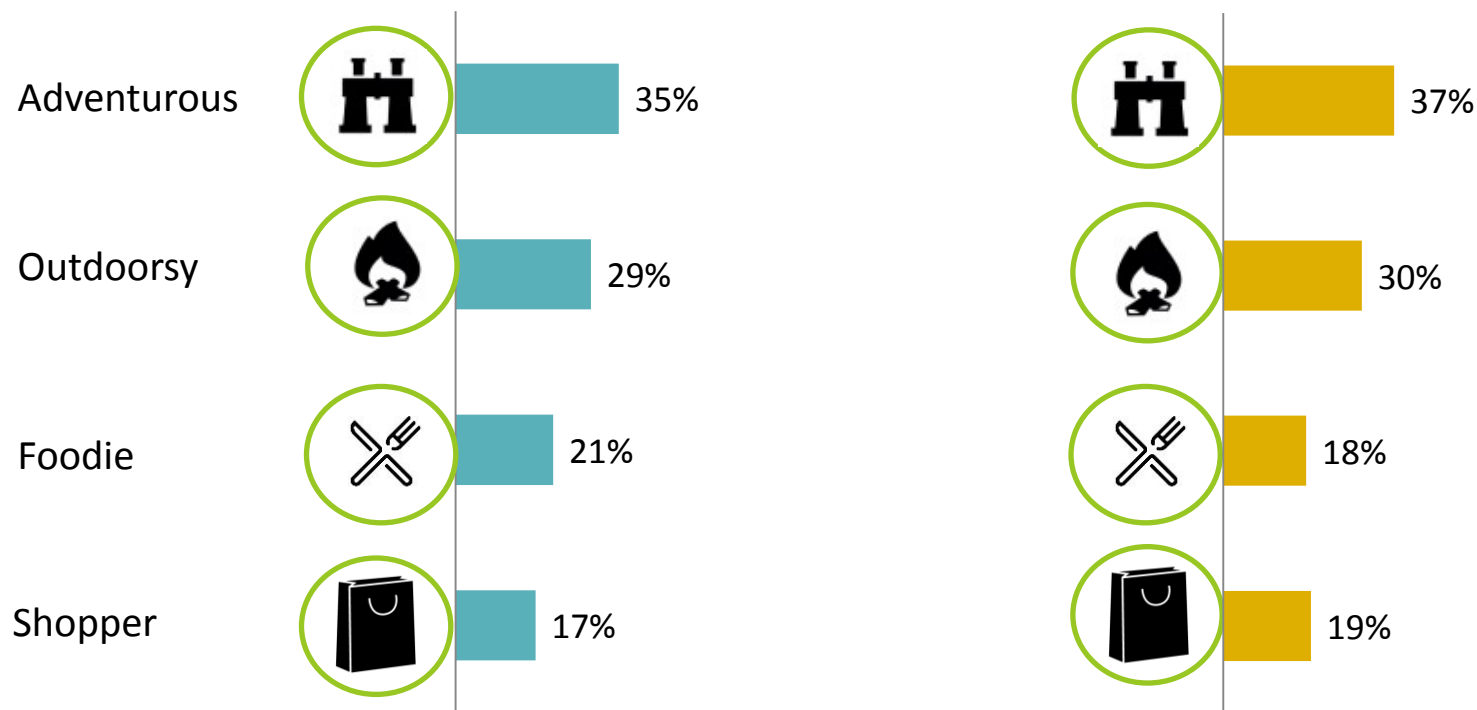
PROFILE OF VICTORIA'S MOST LIKELY VISITORS (CONT.)

Say they are.... (rated 7 out of 7)

2013

2011

Adventurous and outdoorsy types are the most drawn to Victoria.



DETAILED FINDINGS: CATEGORY INSPIRATION

VACATION INSPIRATION (UNAIDED)

Thinking of your most recent vacation/weekend getaway, please tell us what **inspired** you to visit that destination. That is, did you see, read or hear anything that got you interested or reminded you of that destination?

Visiting
friends and
family
11%

Focus efforts on
deals and target
repeat travellers
– pricing and
destination
familiarity
inspire travel.

Friends and
family are
significant travel
influencers.

Previous
travel
experience
8%

Economical
factors (seat
sales, coupons)
8%

Shopping
6%

Quick
getaway
5%

Sight
seeing
4%

Close
proximity
5%

Nice
weather
6%

Going with
friends/family
5%

Special
occasions
4%

Friends/family
recommendation
6%

Beautiful
scenery
6%

Haven't
been
before
4%

Restaurants
and dining
4%

Note: only the most common mentions are shown here.

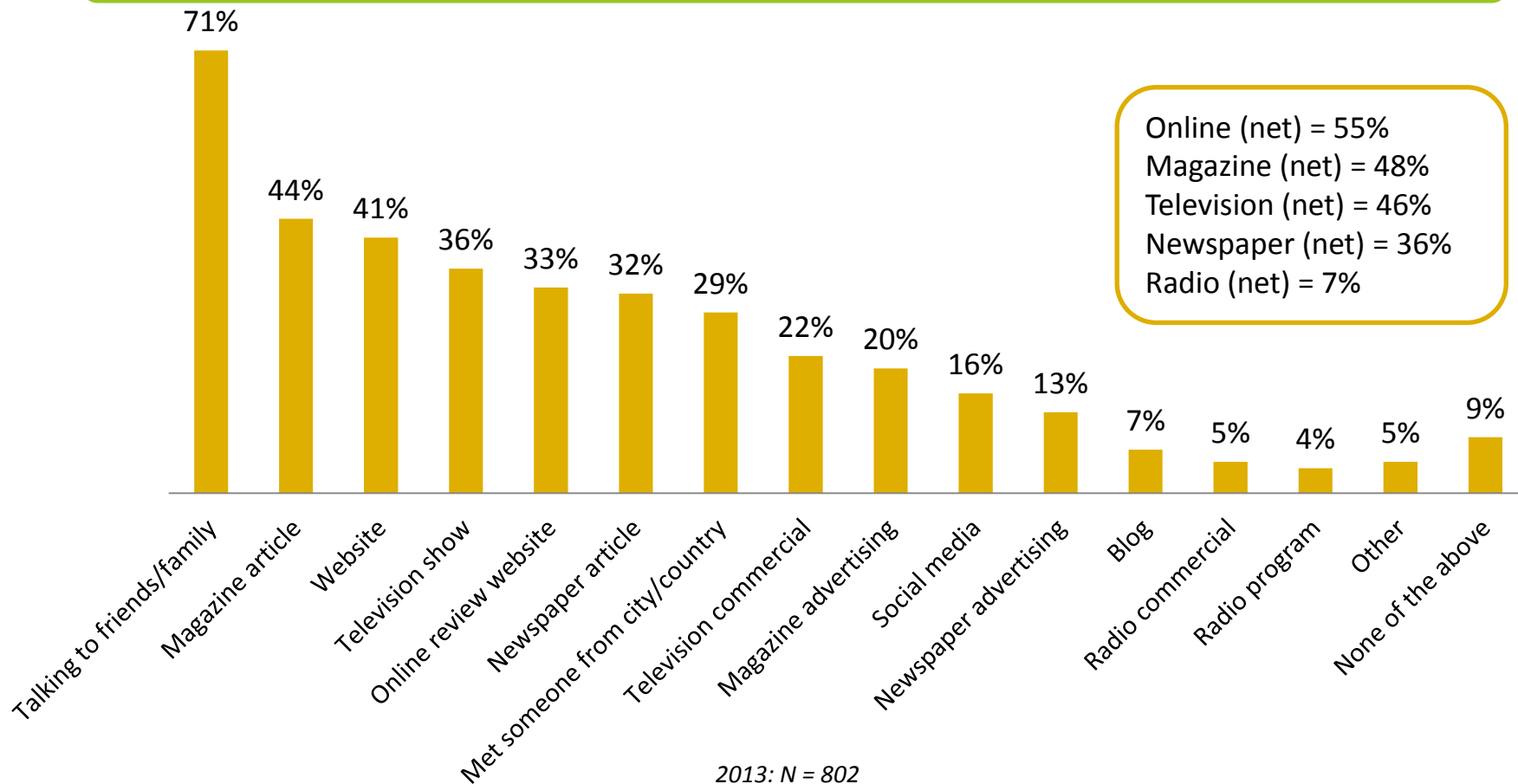
Please refer to appendixes for more vacation inspiration (unaided)

2013: N = 802

VACATION INSPIRATION (AIDED)

Which of the following, if any, have ever *inspired* you to learn more about or to actually visit a place for vacation?

Word of mouth from family and friends plays a key role when it comes to deciding which destination to travel to. Social media outweighs newspaper advertising and radio as an influencer.



DETAILED FINDINGS: CATEGORY IMPORTANCE

CATEGORY IMPORTANCE

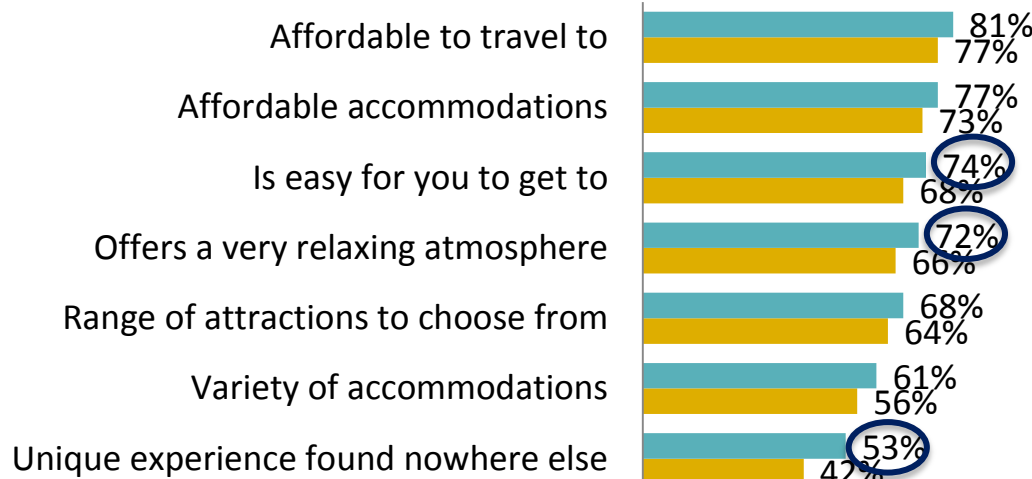
- **The next two slides outline the travel decision criteria that matter most to potential visitors to Victoria. The attributes are placed into three tiers:**
 - **COST OF ENTRY:** Are attributes which are “do or die” in choosing a destination. Victoria must perform on all of these or risk losing a significant number of travellers.
 - **SECONDARY:** Are important in helping develop the distinct position and personality of a destination, but are not deal breakers. While it is not necessary to perform well on all secondary attributes, stronger general performance by a destination here will create more motivation to visit.
 - **LESS IMPORTANT:** These attributes are lowest in priority to address. They do help in boosting positive perceptions of a destination, but should not be focused on before attributes in the cost of entry or secondary tiers.

CATEGORY IMPORTANCE

How important are the following to you when choosing a vacation destination?

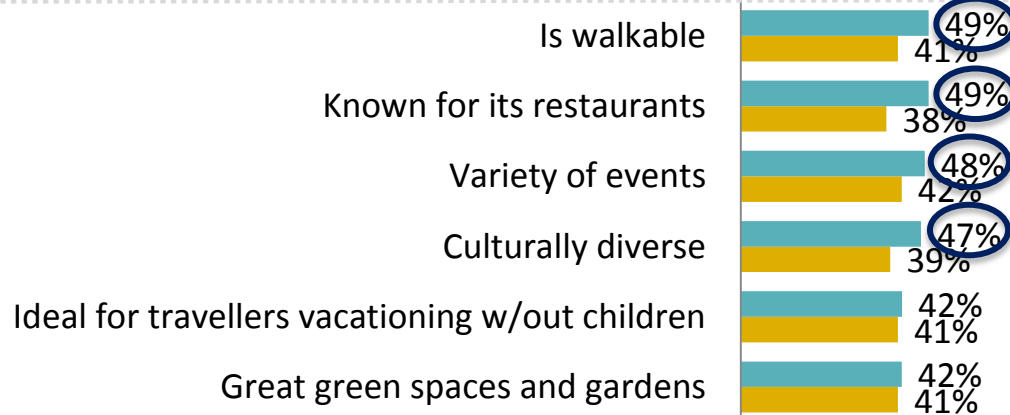
% Important (rated 6,7 out of 7)

COST OF ENTRY
Critical factors that cannot be ignored



The most critical factors in 2011 continue to be the most important this year.

SECONDARY
Differentiators, help build a unique experience



Travellers are more demanding nowadays – nearly all attributes score higher on importance this year than in 2011.

■ 2013 ■ 2011

2013: N = 802 | 2011: N = 612

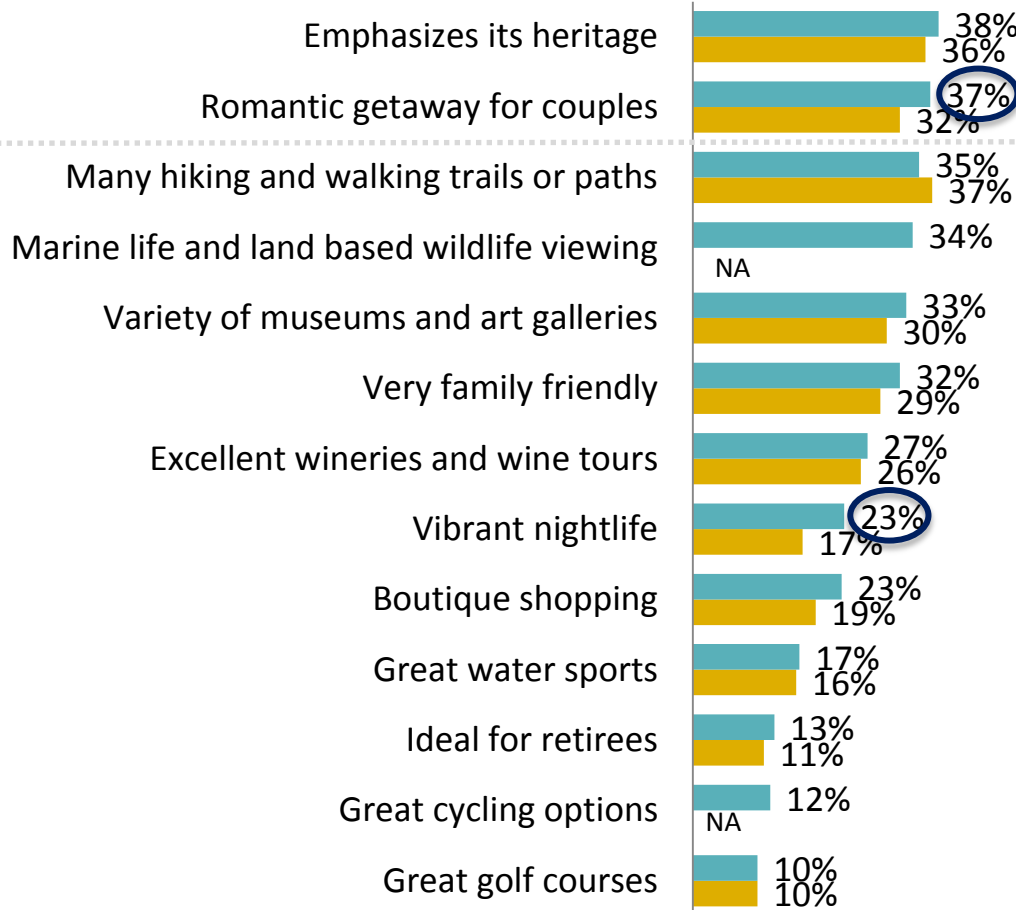
CATEGORY IMPORTANCE (CONT.)

How important are the following to you when choosing a vacation destination?

% Important (rated 6,7 out of 7)

SECONDARY

LESS IMPORTANT
Low priority, address after cost of entry
and secondary criteria



Newly added attributes *marine and wildlife viewing* and *great cycling options* are lower on the priority list.

■ 2013 ■ 2011

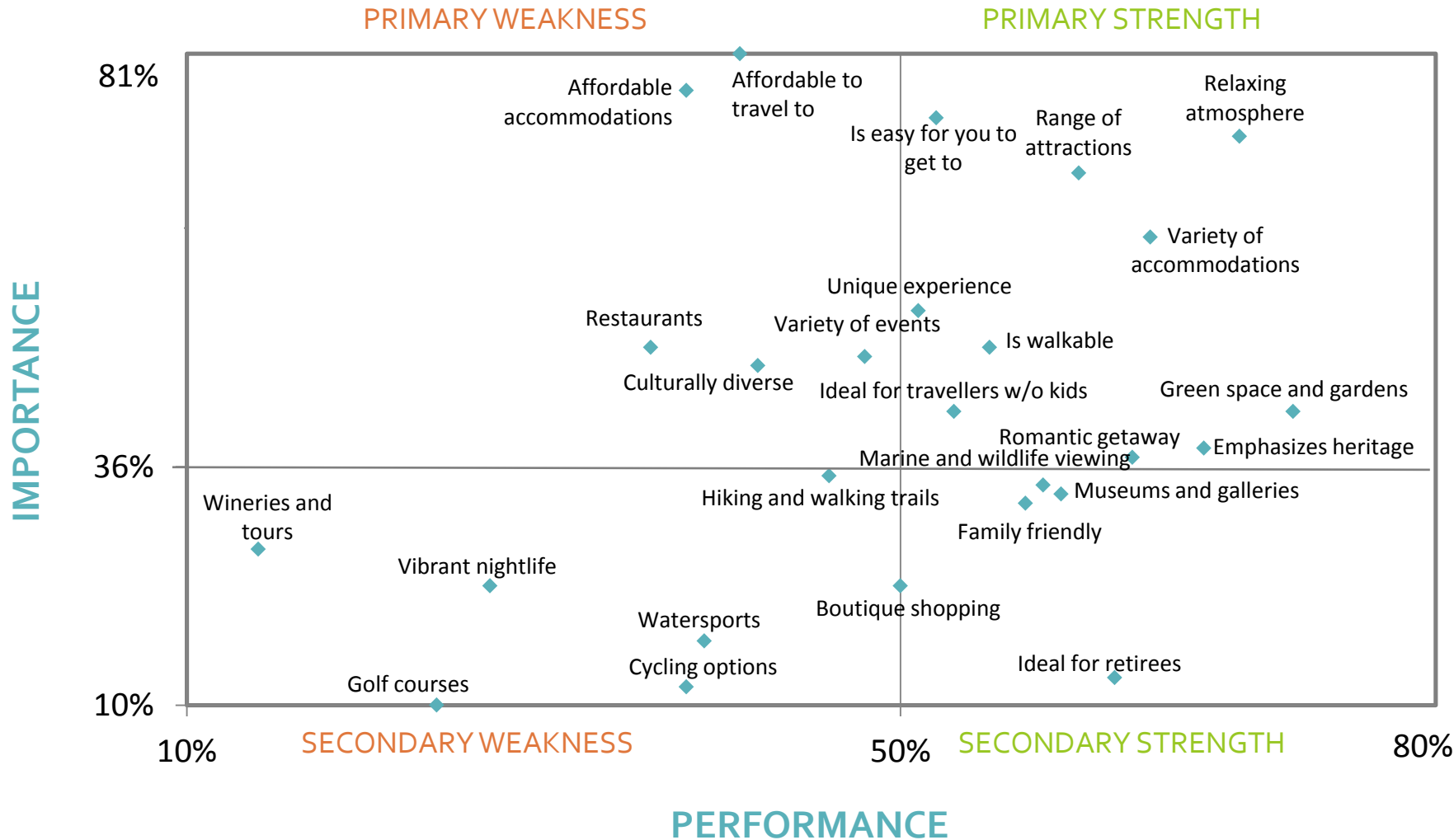
2013: N = 802 / 2011: N = 612

DETAILED FINDINGS: ACTION GRID

ACTION GRID: EXPLANATION

- The action grid is meant to help Victoria not only prioritize attributes, but also understand which need improvement by comparing category importance against Victoria's performance. The action grid is broken into four quadrants:
 - **PRIMARY STRENGTH:** These strengths should be maintained and leveraged in messaging. These are attributes which are cost of entry or secondary, and Victoria generally performs above competitors on them.
 - **PRIMARY WEAKNESS:** These are critical to address and will yield the greatest return in driving more visitors. These are attributes which are cost of entry or secondary, and Victoria generally performs below competitors on them.
 - **SECONDARY STRENGTH:** These are differentiators and add to Victoria's brand but should be only addressed after primary strengths and weaknesses. These are secondary or less important, but Victoria generally performs above competitors.
 - **SECONDARY WEAKNESS:** Are the lowest priority. These are secondary or less important, and Victoria generally performs below competitors.

2013 ACTION GRID OVERVIEW



PRIMARY STRENGTHS

Attributes	Change in Importance (Since 2011)	Change in Performance (Since 2011)
Unique experience	11%	6%
Is walkable	8%	4%
Is easy for you to get to	6%	3%
Relaxing atmosphere	6%	5%
Romantic getaway	5%	2%
Variety of accommodations	5%	0%
Range of attractions	4%	-1%
Emphasizes heritage	2%	-2%
Great space and gardens	1%	-1%
Ideal for travellers w/out kids	1%	2%

Primary
Strength

PRIMARY WEAKNESSES

Attributes	Change in Importance (Since 2011)	Change in Performance (Since 2011)
Restaurants	11%	2%
Culturally diverse	8%	-4%
Variety of events	6%	-2%
Affordable to travel to	4%	2%
Affordable accommodations	4%	4%

Primary
Weakness

SECONDARY STRENGTHS

Attributes	Change in Importance (Since 2011)	Change in Performance (Since 2011)
Boutique shopping	4%	2%
Museums and galleries	3%	-5%
Family friendly	3%	2%
Ideal for retirees	2%	3%
Marine and wildlife viewing	N/A	N/A

Secondary
Strength

SECONDARY WEAKNESSES

Attributes	Change in Importance (Since 2011)	Change in Performance (Since 2011)
Vibrant nightlife	6%	-1%
Excellent wineries and wine tours	1%	-2%
Watersports	1%	4%
Golf courses	0%	-2%
Hiking and walking trails	-2%	5%
Cycling options	N/A	N/A

Secondary
Weakness

DETAILED FINDINGS: COMPETITIVE ANALYSIS

COMPETITIVE ANALYSIS: EXPLANATION

- **Victoria's chief competitors (Seattle, Okanagan, Whistler and Vancouver) were all measured on the same attributes as Victoria so that we can perform a competitive assessment. Following are two types of analyses which outline the performance of Victoria and how it fares against competitors.**
 - **GAP ANALYSIS:** This provides a benchmark to examine Victoria's scores against a competitive average (this norm is comprised of the ratings for Seattle, Okanagan, Whistler and Vancouver). There are three tiers to consider:
 - **Competitive Advantage:** Where Victoria scores significantly above the competitive norm.
 - **Neutral:** Where Victoria scores just above, equal or just below the competitive norm.
 - **Competitive Disadvantage:** Where Victoria scores significantly below the competitive norm.
 - **PERFORMANCE SUMMARY:** Summarizes the competitive gap analysis for each destination. Green indicates a competitive advantage, while red indicates a competitive disadvantage.
 - **Note:** In 2011, the competitive destinations included Seattle, Okanagan and Whistler. This year, Vancouver was added as the fourth competitive destination. As such, the competitive average from 2011 and 2013 are not directly comparable.

GAP ANALYSIS

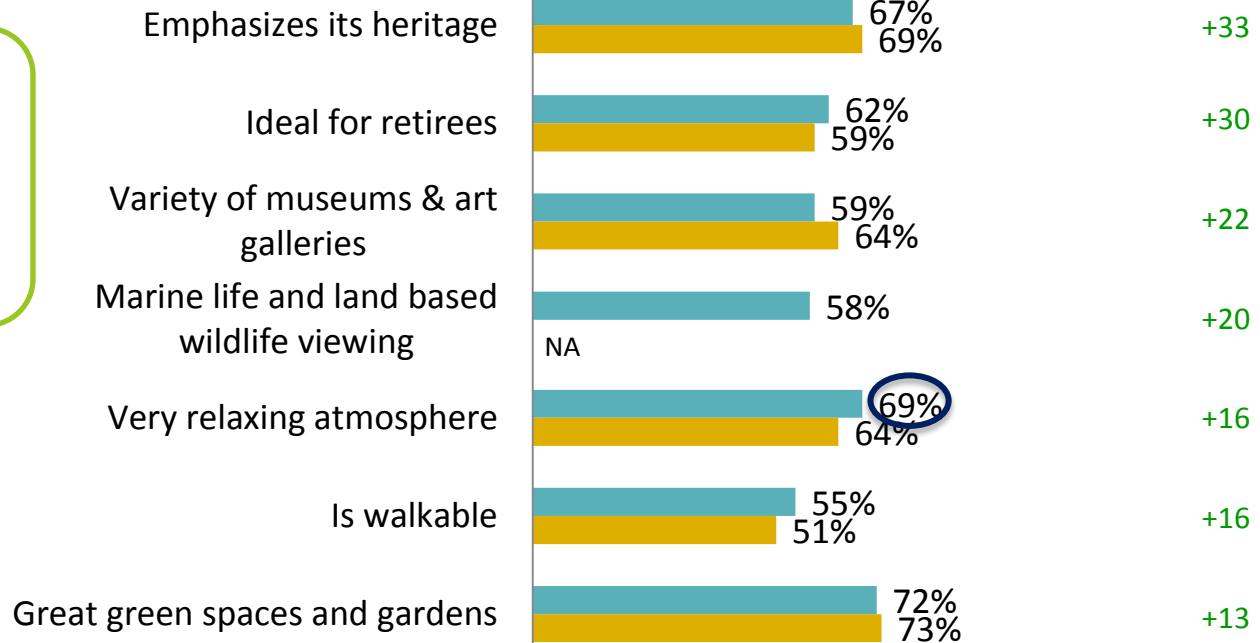
Please indicate whether you agree or disagree with the following statements about Victoria, as well as about Whistler, Seattle, Vancouver or Okanagan.

% Agree for VICTORIA (rated 6,7 out of 7)

Performance Gap (2013)

COMPETITIVE ADVANTAGE

Victoria
trumps
competitive
destinations
on these
attributes.



NEUTRAL



2013 2011

2013: N = 802 | 2011: N = 612

Note: Performance Gap for 2013 = Victoria – aggregate ratings for Whistler, Seattle, Okanagan and Vancouver

GAP ANALYSIS

Please indicate whether you agree or disagree with the following statements about Victoria, as well as about Whistler, Seattle, Vancouver or Okanagan.

% Agree for VICTORIA (rated 6,7 out of 7)

Performance Gap (2013)

NEUTRAL

Variety and affordability of accommodations and a unique experience are highly important and need to be strengthened by Victoria.



2013: N = 802 / 2011: N = 612

Note: Performance Gap for 2013 = Victoria – aggregate ratings for Whistler, Seattle, Okanagan and Vancouver

GAP ANALYSIS

Please indicate whether you agree or disagree with the following statements about Victoria, as well as about Whistler, Seattle, Vancouver or Okanagan.

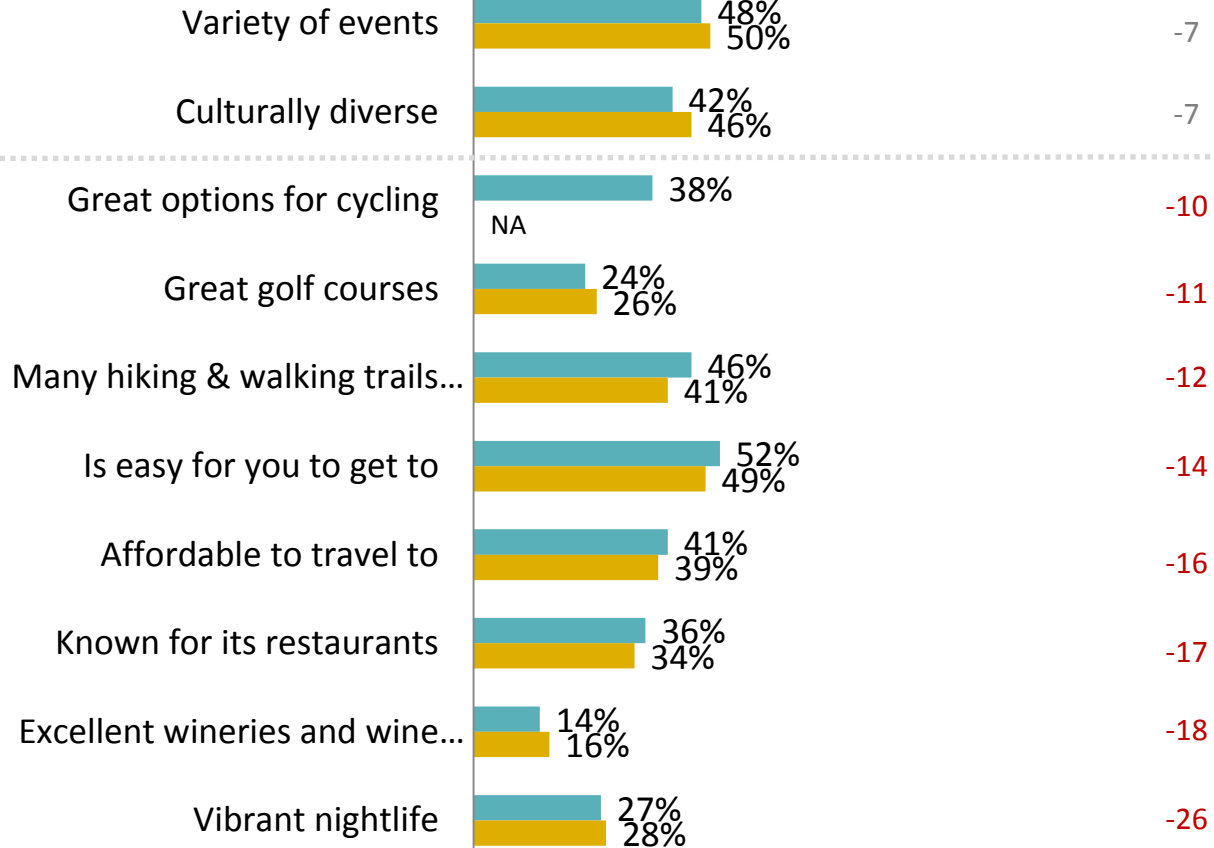
% Agree for VICTORIA (rated 6,7 out of 7)

Performance Gap (2013)

NEUTRAL

COMPETITIVE DISADVANTAGE

Priority should be to improve affordability and ease of travel.



2013 2011

2013: N = 802 | 2011: N = 612

PERFORMANCE SUMMARY

2013

VICTORIA

Heritage
Ideal for retirees
Museums/galleries
Marine/wildlife
Relaxing
Walkable
Green space



Hiking trails
Accessibility
Affordability
Restaurants
Wineries
Nightlife



2011

VICTORIA

Relaxing
Green space
Heritage
Ideal for retirees
Museums/galleries



Affordability
Accessibility
Nightlife
Hiking trails
Wineries
Mountain sports



A relaxing atmosphere is a unique strength that only Victoria can claim – no other competitive destinations score highly on this factor.

Affordability and accessibility (two factors that are critical when travelling) continue to be competitive disadvantages of Victoria.

Restaurants is perceived to be a competitive weakness for Victoria this year. This should be addressed since restaurants are becoming increasingly important when choosing a destination.

Black = Scores significantly above competitors

Red = Scores significantly below competitors

PERFORMANCE SUMMARY

2013

SEATTLE

Affordability
Nightlife
Heritage
Boutique shopping
Restaurants
Culture
Museums/galleries
Attractions/events



Golf
Hiking trails
Ideal for retirees



Seattle is the only destination to boost strengths in both affordable travel and accommodations.

Seattle is a stronger competitor this year. Perceptions of Seattle have strengthened in a number of areas – namely, heritage, shopping and museums/galleries.

2011

SEATTLE

Affordability
Accessibility
Culture
Restaurants
Nightlife
Attractions/Events



Relaxing
Hiking trails



Same as in 2011, many of Victoria's weaknesses are Seattle's strengths.

Black = Scores significantly above competitors

Red = Scores significantly below competitors

PERFORMANCE SUMMARY

2013

OKANAGAN

Affordability
Golf
Ideal for retirees
Watersports
Wineries



Nightlife
Heritage
Walkable
Boutique shopping
Restaurants
Culture
Museums/galleries
Attractions
Marine /wildlife



Golf courses, wineries and watersports are unique strengths of Okanagan.

Compared to 2011, Okanagan scores significantly below competitors on more factors.

2011

OKANAGAN

Affordability
Accessibility
Wineries
Golf
Watersports



Nightlife
Restaurants
Heritage
Walkability



Black = Scores significantly above competitors

Red = Scores significantly below competitors

PERFORMANCE SUMMARY

2013

WHISTLER

Nightlife
Hiking trails
Walkable



Affordability

Heritage

Watersports

Ideal for retirees

Accommodations

Culture

Wineries

Museums/galleries

Attractions/events

Marine/wildlife



Hiking trails is a unique strength of Whistler.

This year, perceptions of Whistler is much weaker compared to other destinations for many factors – especially for the range of activities and events.

2011

WHISTLER

Nightlife
Hiking trails
Mountain sports



Affordability

Accessibility

Heritage

Accommodations

Museums/galleries



Black = Scores significantly above competitors

Red = Scores significantly below competitors

PERFORMANCE SUMMARY

2013

VANCOUVER

Nightlife
Culture
Boutique shopping
Restaurants
Museums/galleries
Attractions/events
Marine/wildlife



Wineries
Ideal for retirees



Vancouver shares many similar strengths to Seattle.

Vancouver does not boast strengths in any of the important factors identified as “costs of entry” for a tourism destination, only exception being a range of attractions.

Black = Scores significantly above competitors

Red = Scores significantly below competitors

DETAILED FINDINGS: TRAVELLING TO VICTORIA

Familiarity with Victoria is high, but decreased significantly among Seattle residents this year. Further targeting of Seattle residents may be merited.

FAMILIARITY BY MARKET

How familiar are you with each of the following destinations?

% Familiar (very/somewhat)

2013

2011

VANCOUVER RESIDENTS

CALGARY RESIDENTS

SEATTLE RESIDENTS

Vancouver, BC

Victoria, BC

Whistler, BC

BC Okanagan

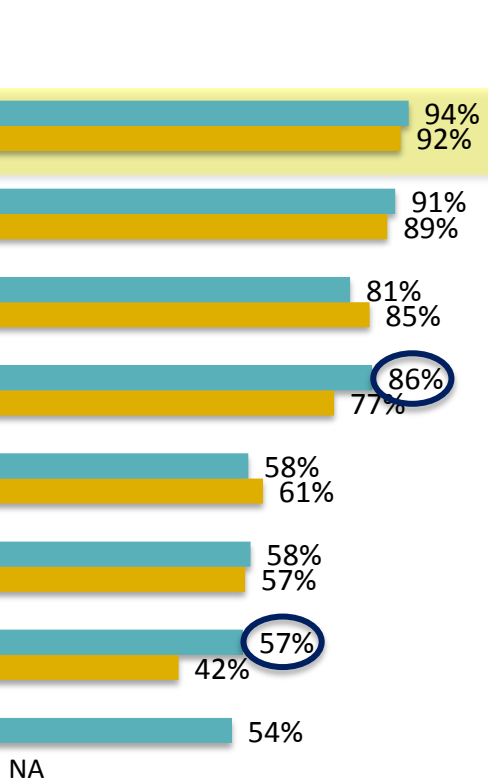
Seattle, WA

Banff, AB

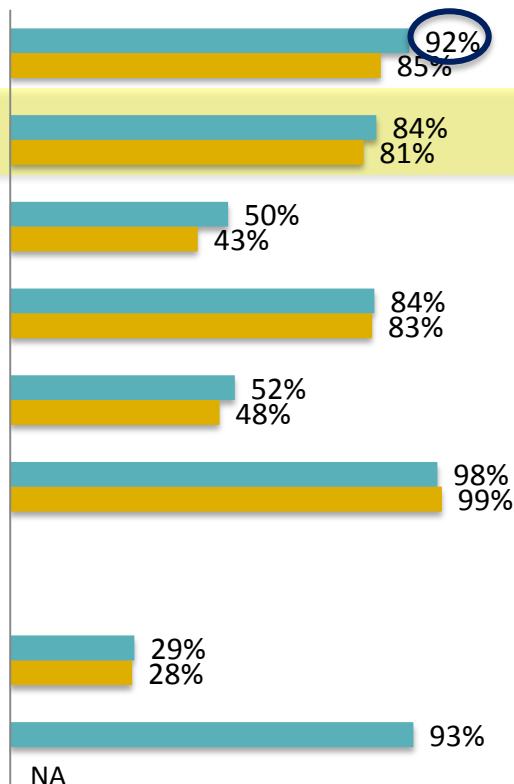
Calgary AB

Portland, OR

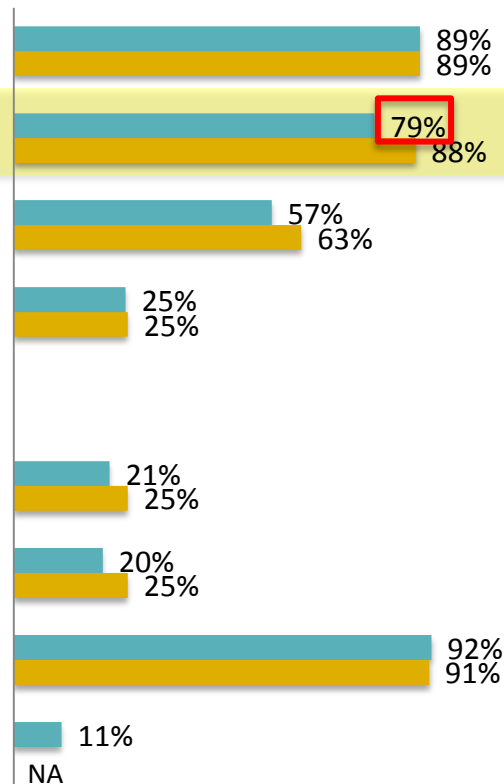
Edmonton



2013: N = 402 | 2011: N = 309



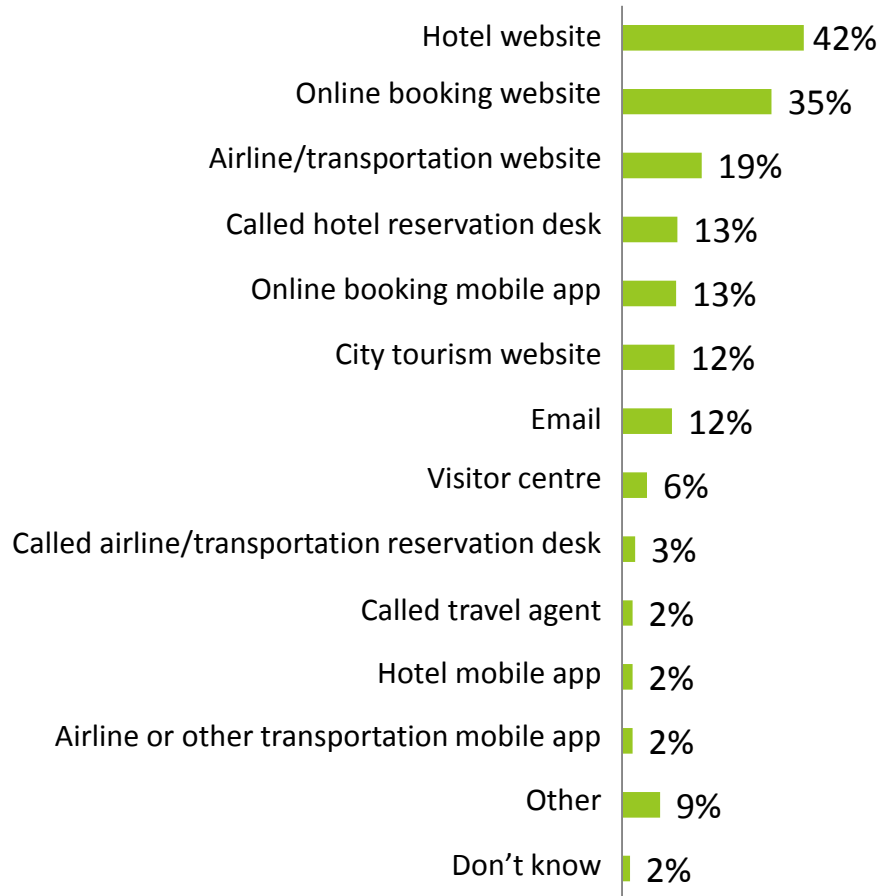
2013: N = 200 | 2011: N = 153



2013: N = 200 | 2011: N = 150

SOURCES FOR BOOKING ACCOMMODATIONS AND TRANSPORTATION

Thinking of your last trip to Victoria, which of the following sources did you use to book your stay (keeping in mind accommodations and transportation)?



Hotel (net) = 51%
Booking website (net) = 42%
Airline/Transportation (net) = 23%

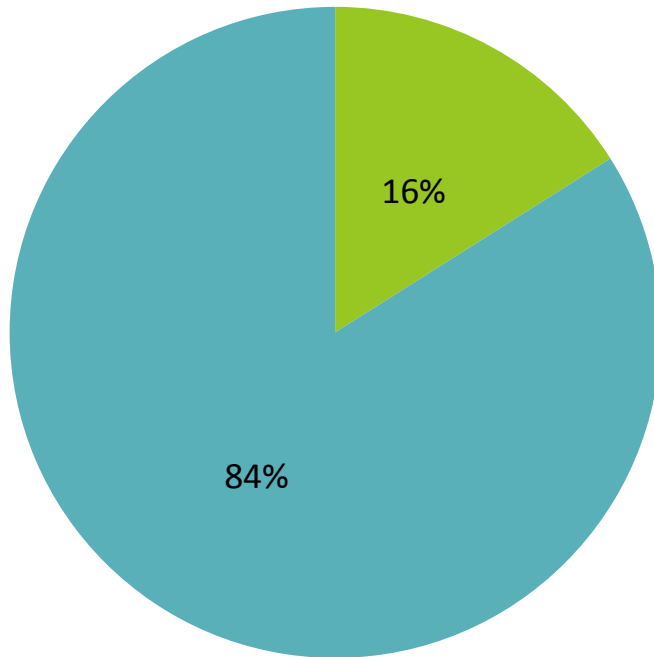
Website (net) = 71%
Telephone (net) = 16%
Mobile app (net) = 16%

Just as many visitors reserved accommodations via telephone as mobile app. This shows the prevalence of mobile apps in the tourism industry, and would be worth tracking going forward to monitor growth.

ACCOMMODATIONS

And if you were taking a 3-day trip to Victoria, would you stay with friends/family or would you pay for accommodations?

■ Stay with friends/family ■ Pay for accommodations



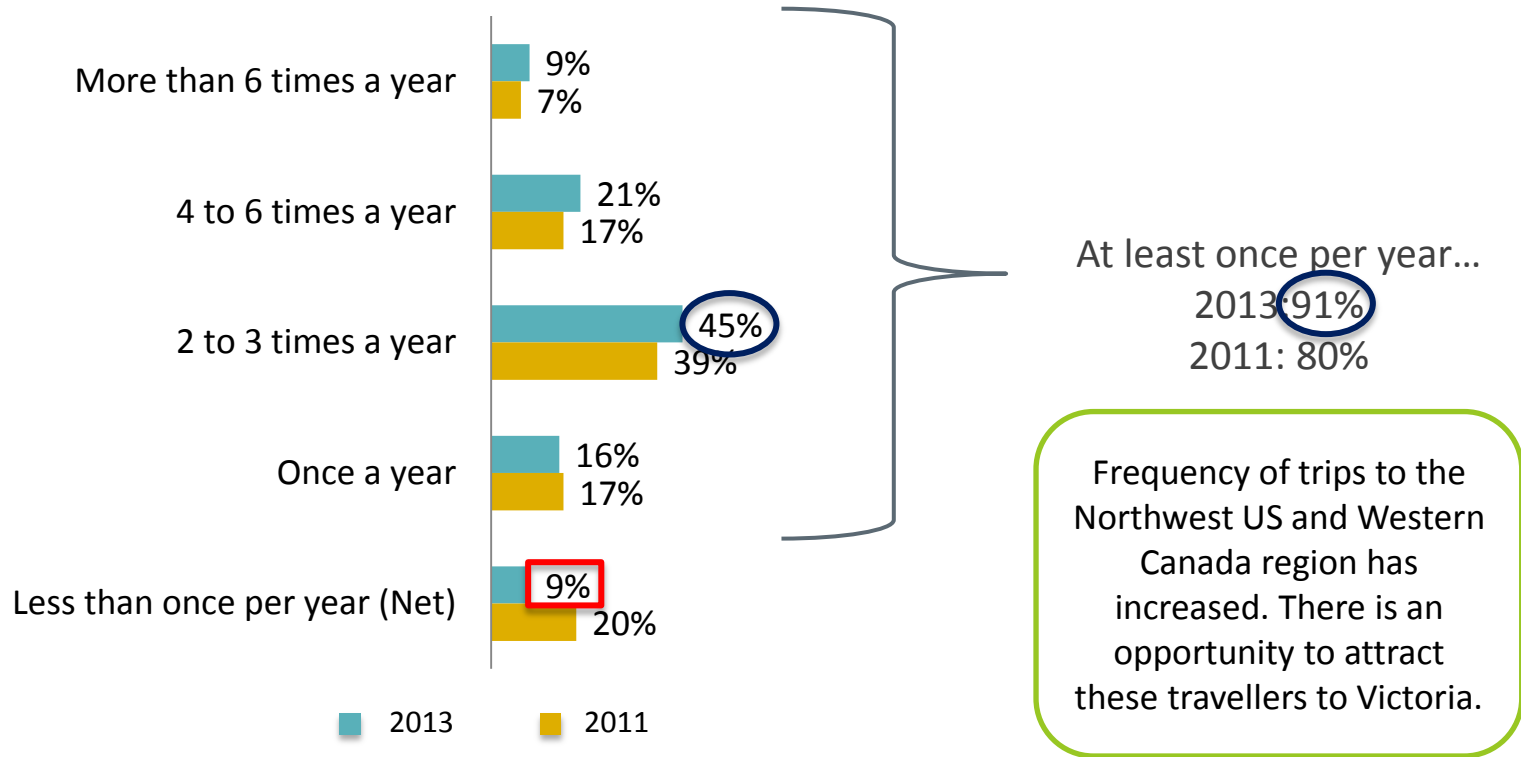
2013: N = 802

Residents from Seattle (98%) are more likely to pay for accommodations than Vancouverites (80%) and Calgarians (78%)

DETAILED FINDINGS: GENERAL PNW TRAVEL BEHAVIOURS

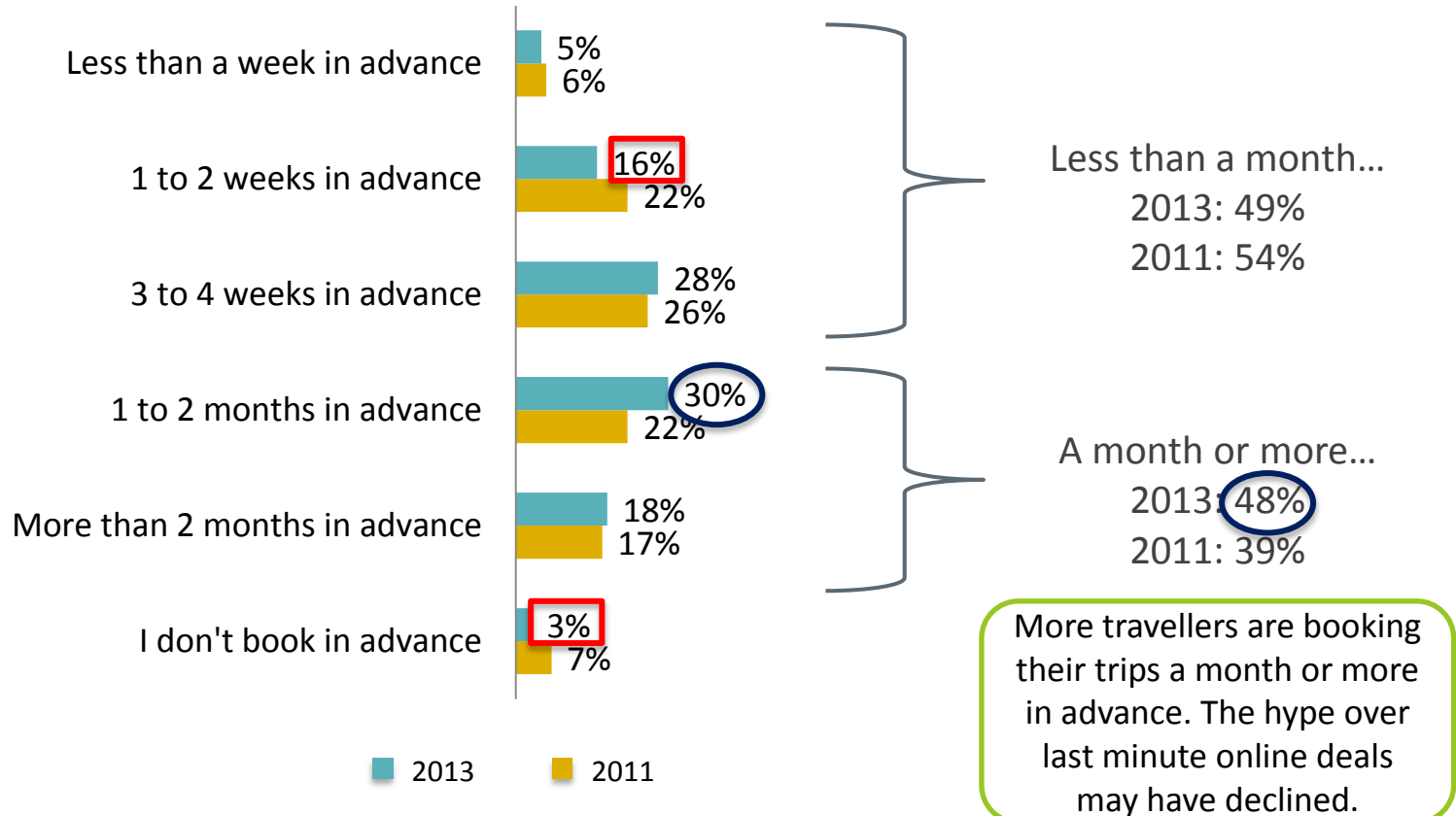
NUMBER OF TRIPS PER YEAR TO NORTHWEST US AND WESTERN CANADA

In a typical year, how often do you take overnight trips to destinations in the Northwest US and Western Canada for vacation?



ADVANCE BOOKING

And when you plan overnight trips to destinations in this region (Northwest US and Western Canada), how far in advance do you typically book your transportation (flights, buses, ferries, etc.) and accommodations?



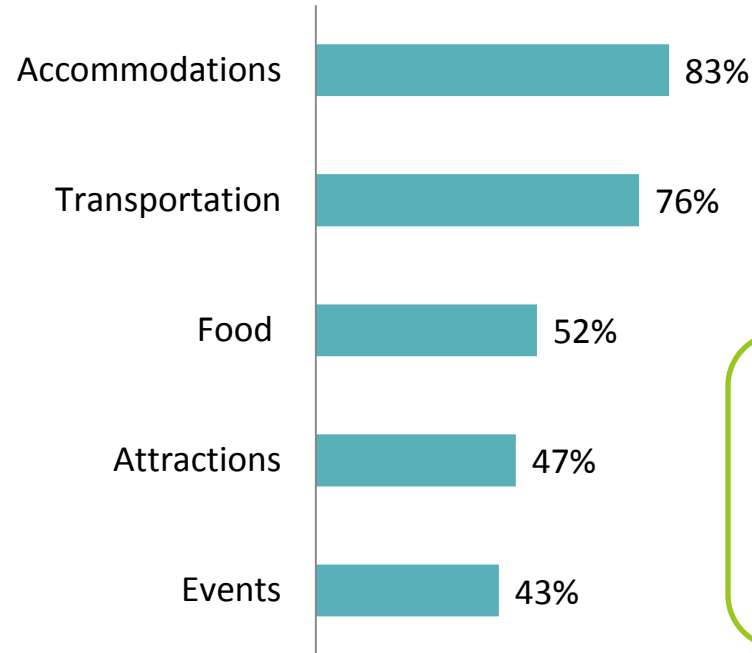
2013: N = 802 | 2011: N = 612

PRICE DISCOUNTS AND SALES

Please tell us if you agree or disagree with the following statements.

% Agree for VICTORIA (rated 6,7 out of 7)

I actively look for price discounts and sales for...



Travellers are seeking price discounts and sales mostly for the two big ticket items – accommodations and travel.

Seattle residents are the most likely to look for deals for these two items

Price discounts should be targeted towards females and those aged 45-65 years. They are more likely to actively look for deals.

ATTITUDINAL PROFILING

The following are some statements about how you may personally feel when travelling for vacation. Please indicate whether you agree or disagree with each.

% Strongly Agree (rated 7 out of 7)



2013: N = 802 | 2011: N = 612

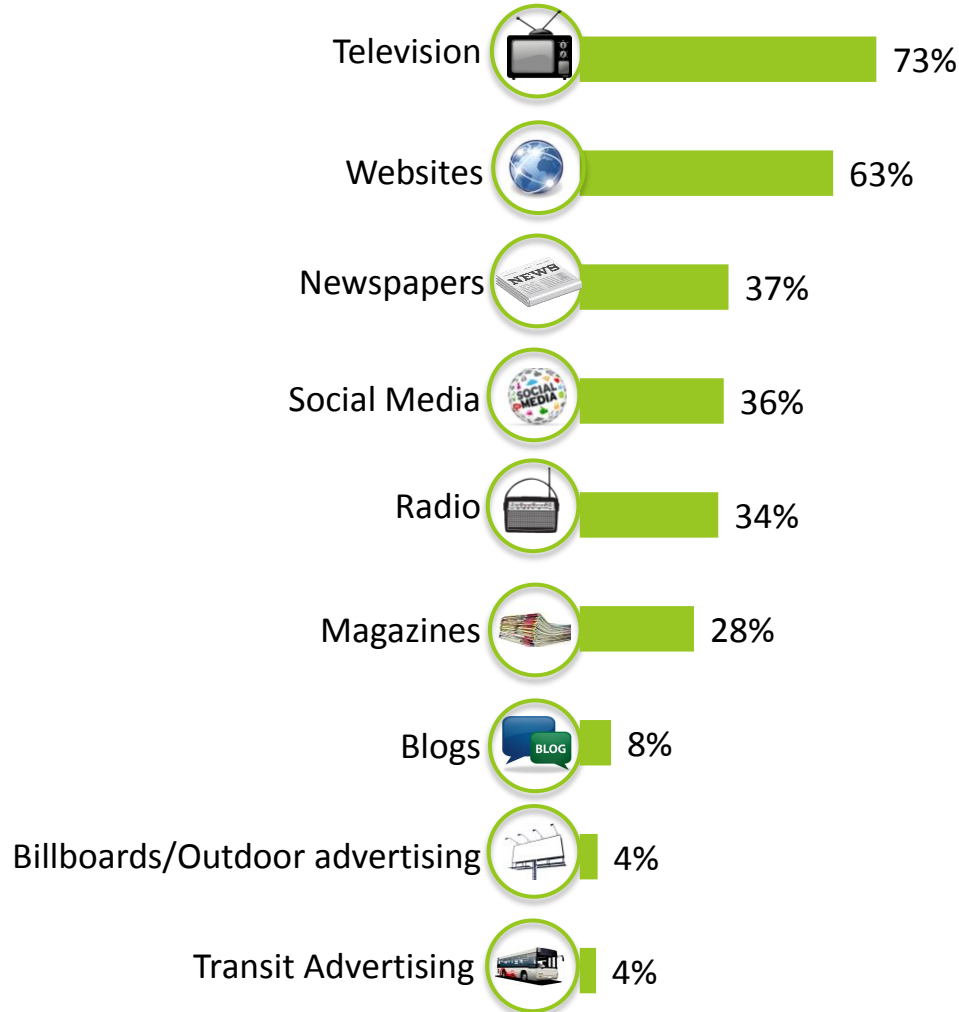
There is a growth in foodies since 2011.

Restaurants may play a bigger role in travel decisions going forward. This is important to keep in mind since restaurants is a competitive disadvantage for Victoria this year.

DETAILED FINDINGS: MEDIA CONSUMPTION

MEDIA CONSUMPTION

From the list below, please pick your top 3 sources that you watch, read or listen to regularly.

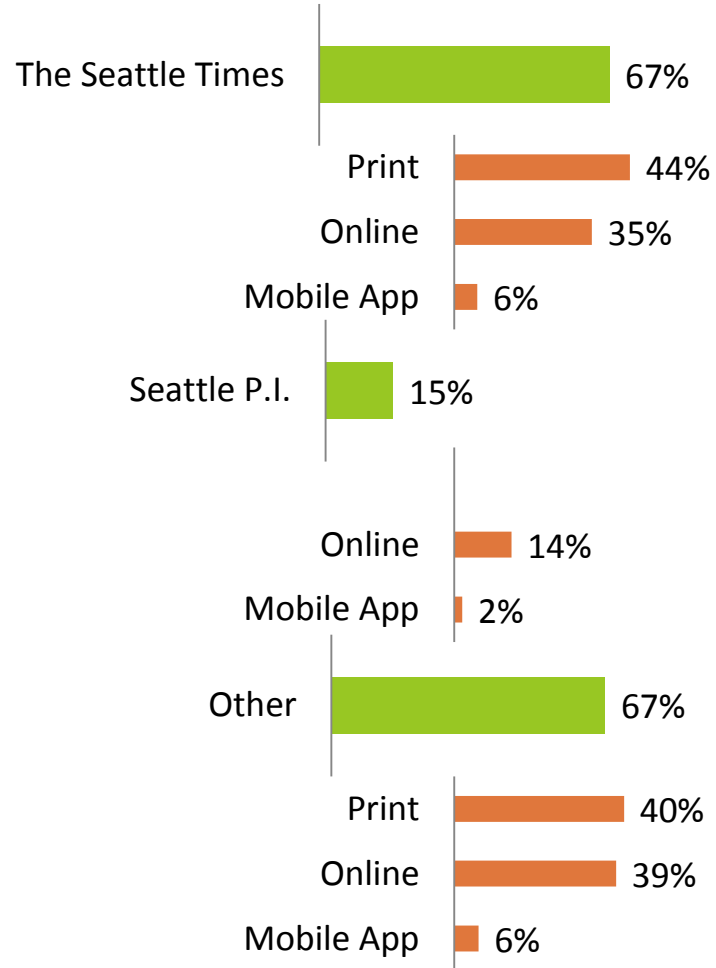


Television is effective for reaching older travellers (55-65 years olds: 84% choose TV as top 3 sources).

Websites, especially social media, is more popular among younger audiences (25-34 year olds: 69% choose social media as top 3 sources, 35-44 year olds: 42%).

MEDIA CONSUMPTION: NEWSPAPER (SEATTLE)

Which newspapers do you read regularly?

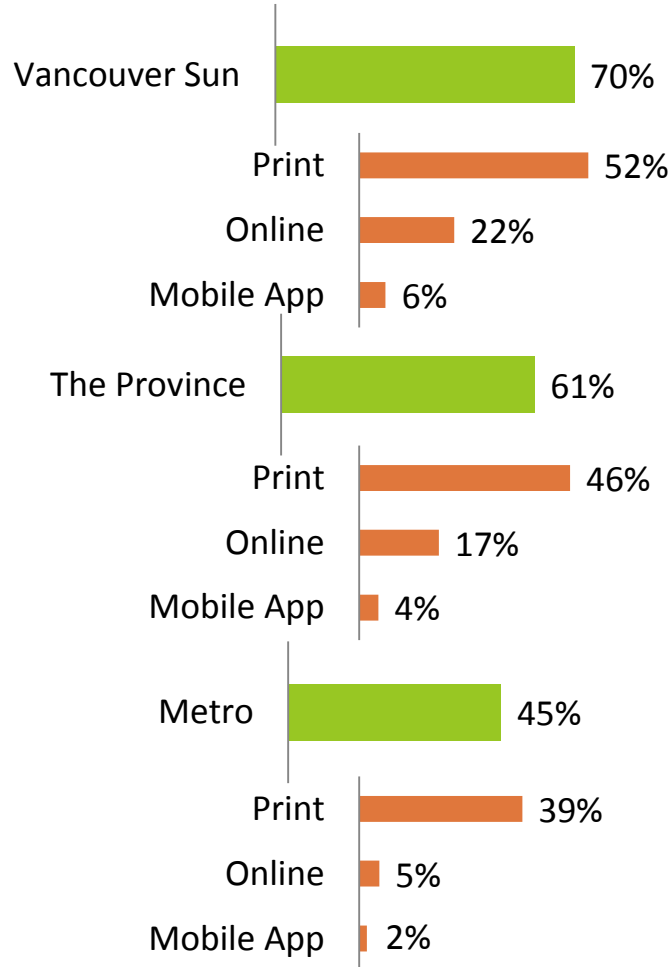


*N = 52 (among those who chose newspapers as top 3 source in Seattle)**

**Small base size, interpret with caution.*

MEDIA CONSUMPTION: NEWSPAPER (VANCOUVER)

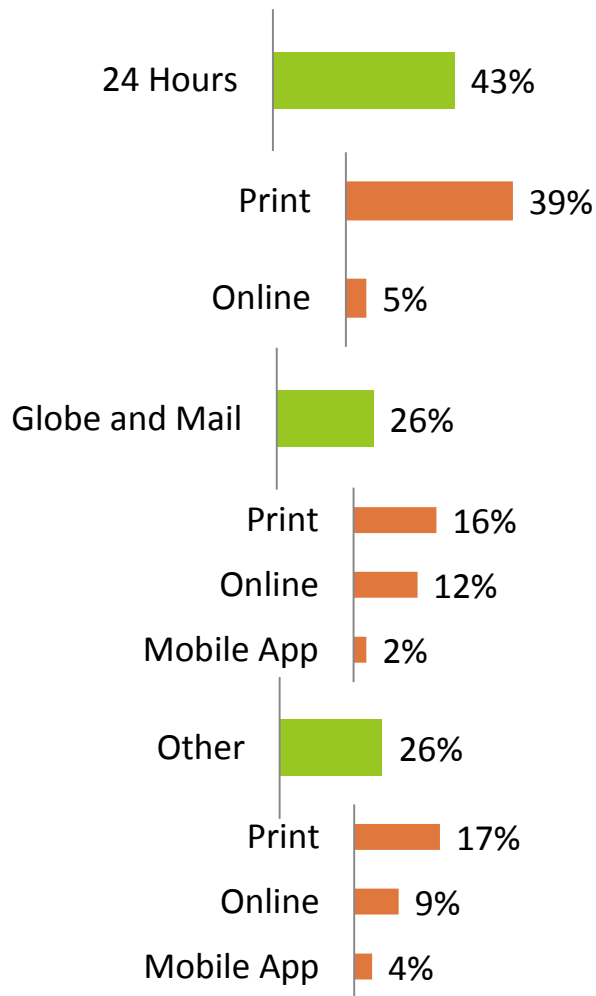
Which newspapers do you read regularly?



Print trumps online versions of newspapers for readership – especially among Canadian travellers.

MEDIA CONSUMPTION: NEWSPAPER (VANCOUVER)

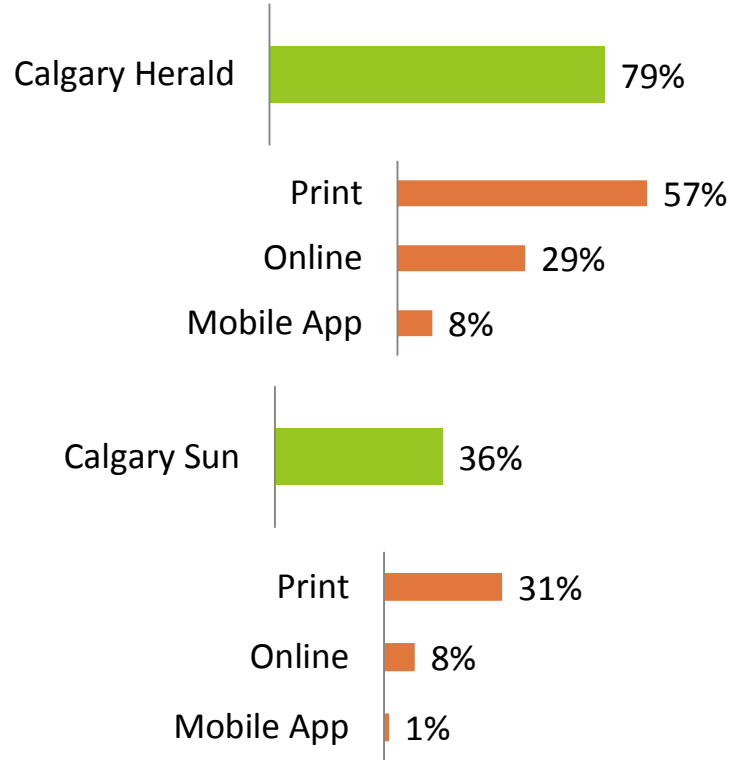
Which newspapers do you read regularly?



N = 167 (among those who chose newspapers as top 3 source in Vancouver)

MEDIA CONSUMPTION: NEWSPAPER (CALGARY)

Which newspapers do you read regularly?

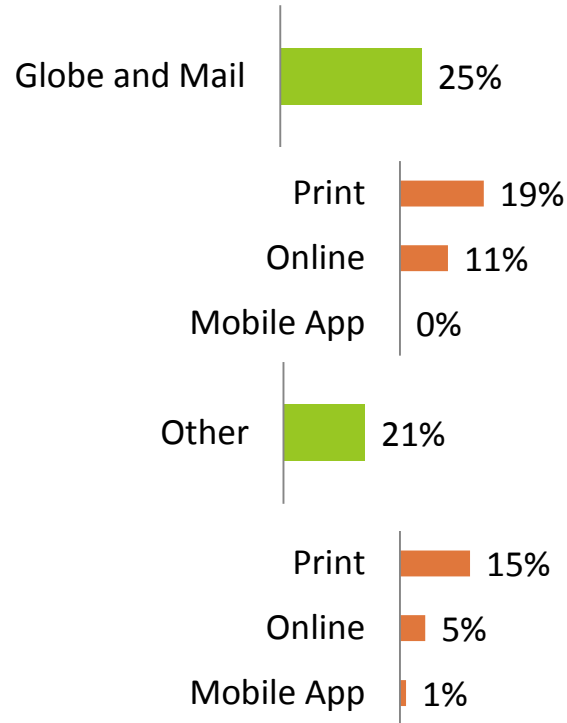


*N = 75 (among those who chose newspapers as top 3 source in Calgary)**

**Small base size, interpret with caution.*

MEDIA CONSUMPTION: NEWSPAPER (CALGARY)

Which newspapers do you read regularly?

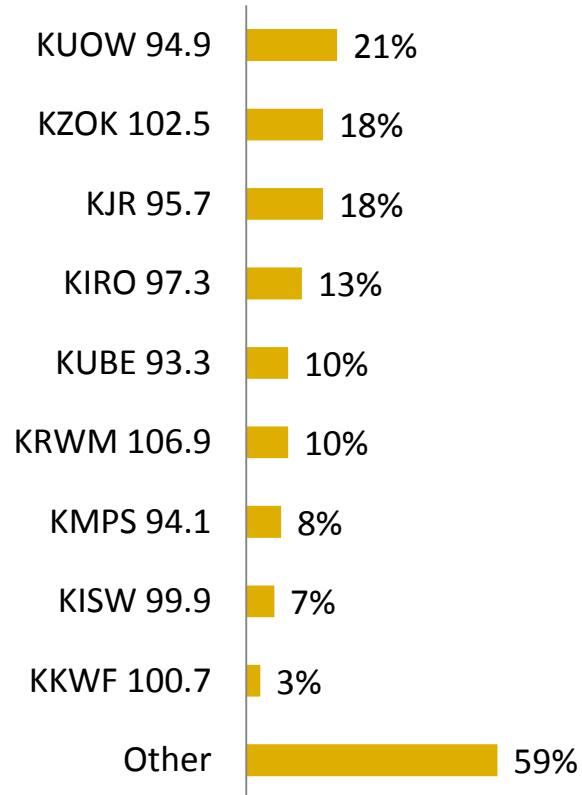


*N = 75 (among those who chose newspapers as top 3 source in Calgary)**

**Small base size, interpret with caution.*

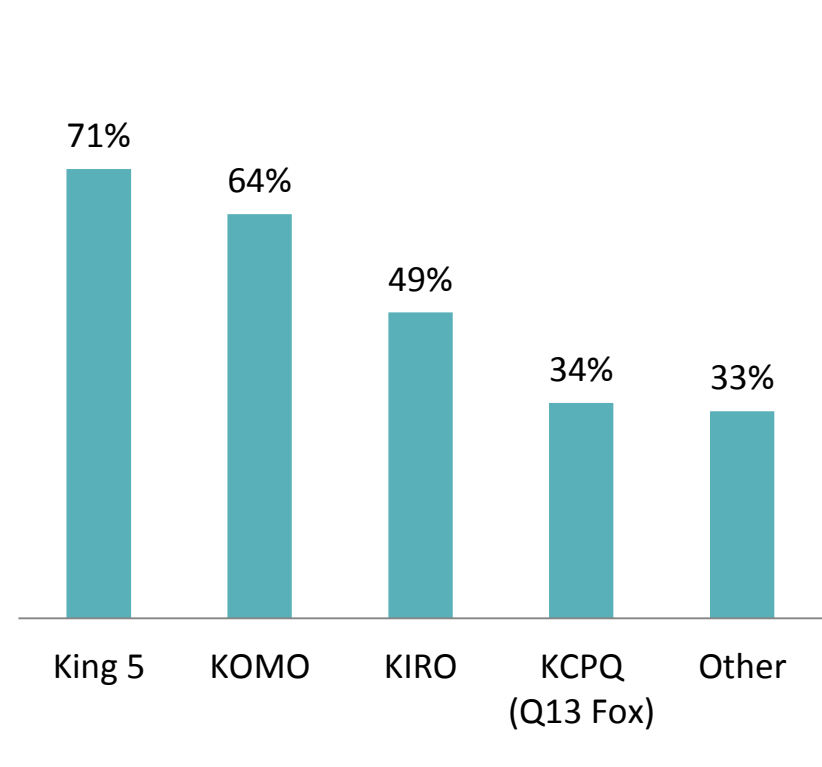
MEDIA CONSUMPTION: SEATTLE

Which radio stations do you listen to regularly?



*N = 61 (among those who chose radio as top 3 source in Seattle)**

Which TV stations do you watch regularly?

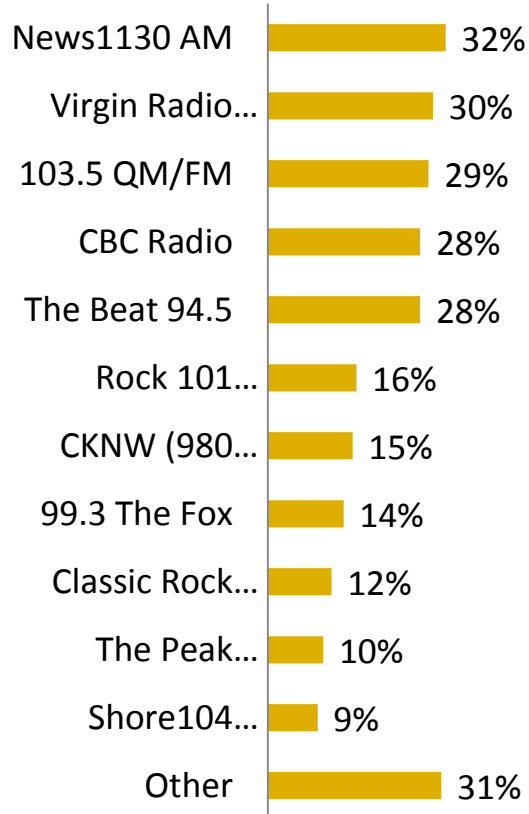


N = 140 (among those who chose TV as top 3 source in Seattle)

**Small base size, interpret with caution.*

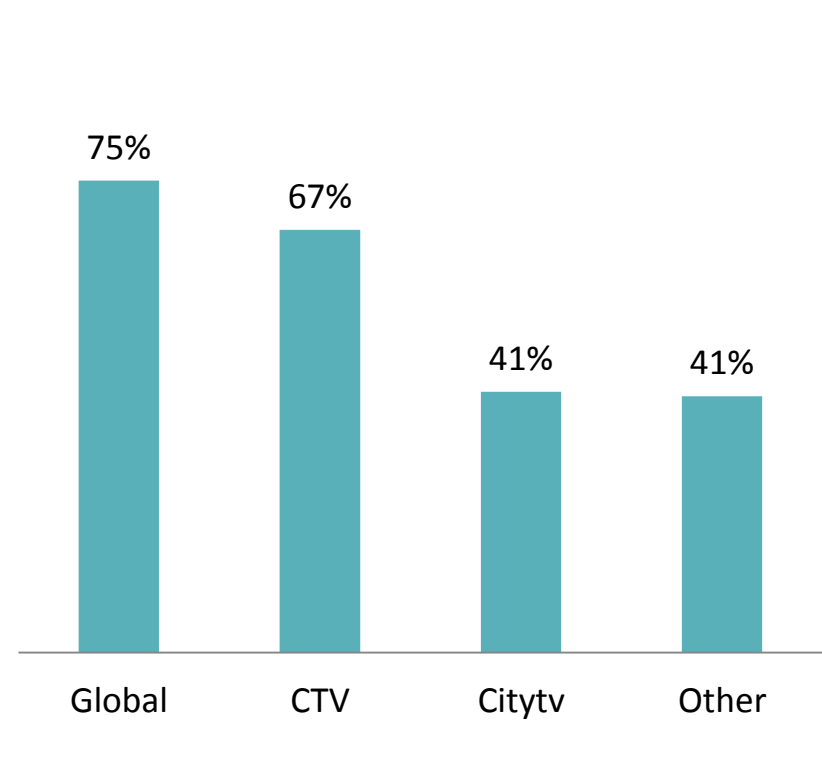
MEDIA CONSUMPTION: VANCOUVER

Which radio stations do you listen to regularly?



N = 131 (among those who chose radio as top 3 source in Vancouver)

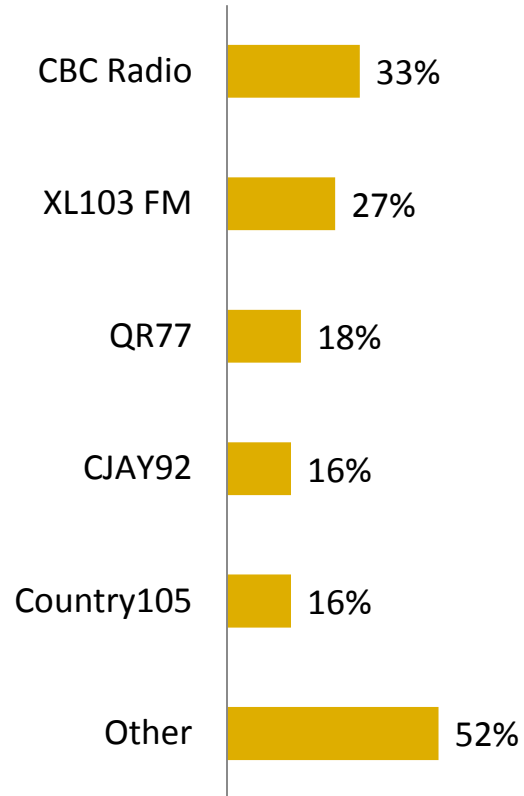
Which TV stations do you watch regularly?



N = 295 (among those who chose TV as top 3 source in Vancouver)

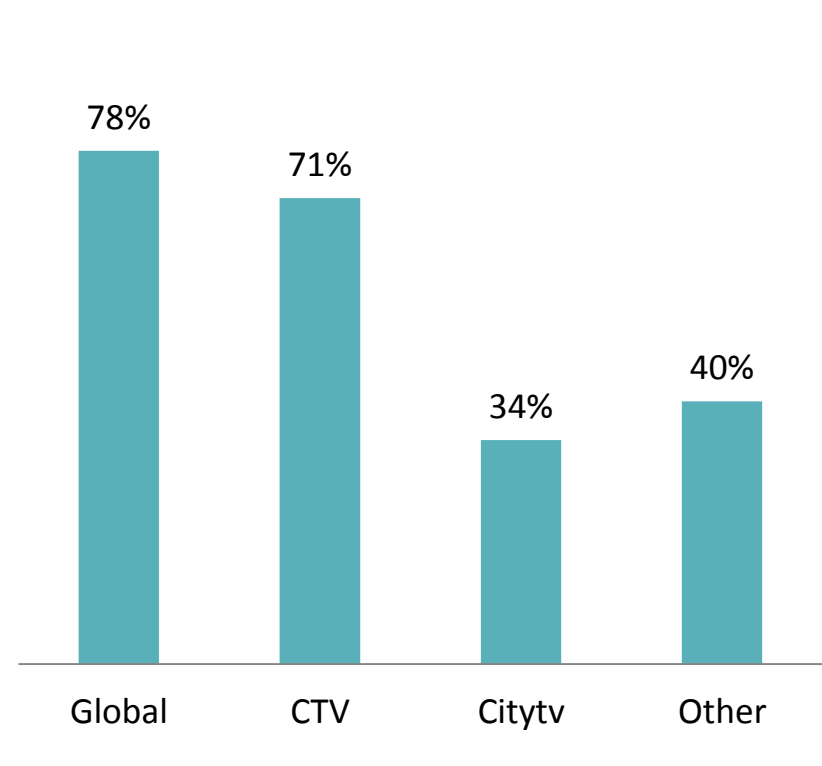
MEDIA CONSUMPTION: CALGARY

Which radio stations do you listen to regularly?



*N = 82 (among those who chose radio as top 3 source in Calgary)**

Which TV stations do you watch regularly?

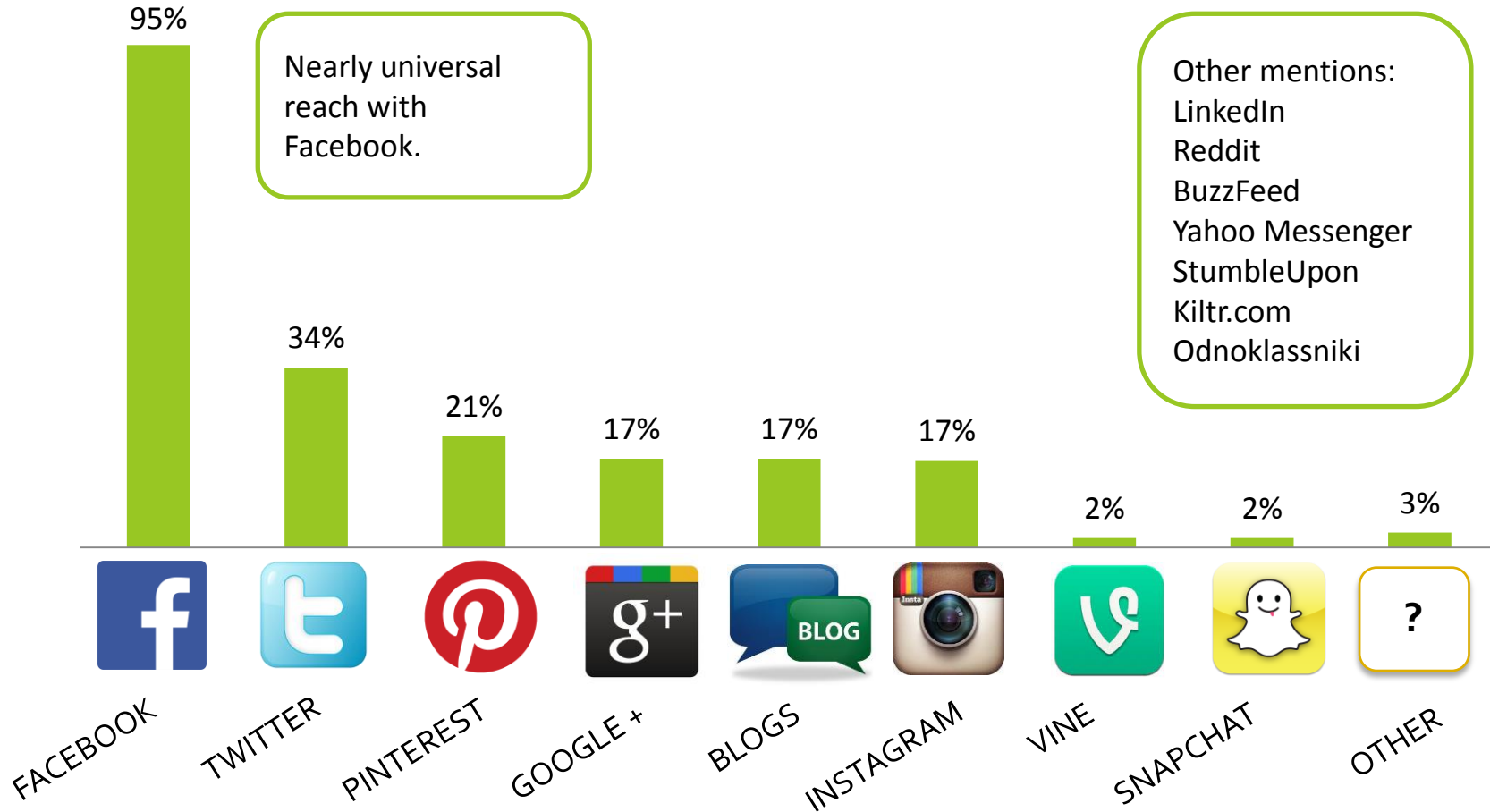


N = 152 (among those who chose TV as top 3 source in Calgary)

**Small base size, interpret with caution.*

SOCIAL MEDIA CONSUMPTION

Which social media channels do you use regularly?



N = 285 (among those who chose social media as top 3 source)

APPENDIX

TOP OF MIND DESTINATIONS

Thinking of destinations in the Northwest US and Western Canada, which place first comes to mind for a vacation/weekend getaway?

2013

- Victoria/Vancouver Island (130)
- Seattle (116)
- Whistler (99)
- Vancouver (86)
- Okanagan (Kelowna, Penticton) (45)
- Other mentions (even if they aren't in the region):
 - Alberta, Oregon, California, Tofino, Hawaii, Idaho, Yellowstone, Alaska

2011

- Victoria/Vancouver Island (112)
- Seattle (91)
- Vancouver (80)
- Whistler (50)
- Other mentions (even if they aren't in the region):
 - Alaska, Hawaii, Lake Louise, Las Vegas, Mexico, Portland/Oregon Coast and Tofino

2013: N = 802 | 2011: N = 612

VACATION INSPIRATION (UNAIDED)

*Thinking of your most recent vacation/weekend getaway, please tell us what **inspired** you to visit that destination. That is, did you see, read or hear anything that got you interested or reminded you of that destination?*

Additional Mentions (Order from L – R, highest to lowest)

Activities/interesting activities/recreational activities (other & non-specific)
 Went to a concert/show/theatre/entertainment
 Go regularly/frequently
 Research/online research
 Advertising/saw advertising (i.e., radio, email, etc.)
 Participation in sporting
 Event/competition/tournament/charity run
 Wine/wine tasting/wine country
 Good accommodations/resort
 Friends/family (non-specific)
 Based on books/newspaper articles/travel magazines
 Business trip/for work/work conference/extended a business trip
 Attended event(s) (other & non-specific)
 Can drive/easy to drive there
 Ocean/coast/beach
 Mountains
 For rest/relaxation/low stress
 Water/lakes/waterfall

Skiing/snowboarding
 Watching sporting event
 Nature/natural surroundings
 Have a place there/timeshare/had a place to stay
 Heard good things about it/good reputation
 Television program/travel
 Program/documentary/movie
 For fun/to have fun
 Camping
 History of the place
 Hadn't been there for a while and wanted to return
 Had the time to go
 No sales tax
 Impulse/last minute decision/spur of the moment
 Kid-friendly/good for the whole family
 Golf/golfing trip
 On the way/close to somewhere else I was going
 Just felt like going/wanted to go
 The city/visiting city/enjoy the city
 Ferries/boat ride

VACATION INSPIRATION (UNAIDED)

*Thinking of your most recent vacation/weekend getaway, please tell us what **inspired** you to visit that destination. That is, did you see, read or hear anything that got you interested or reminded you of that destination?*

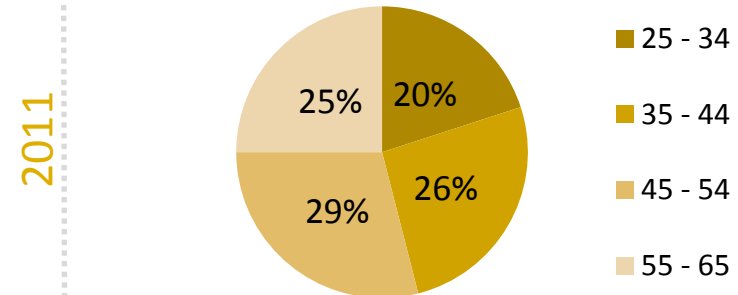
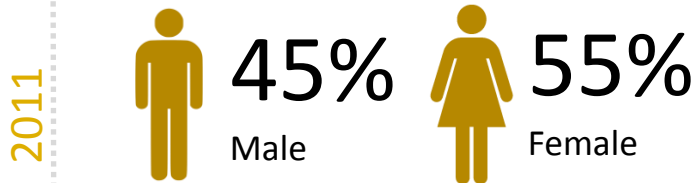
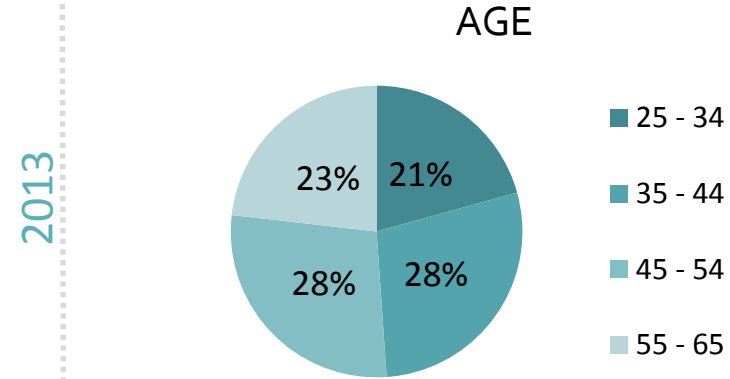
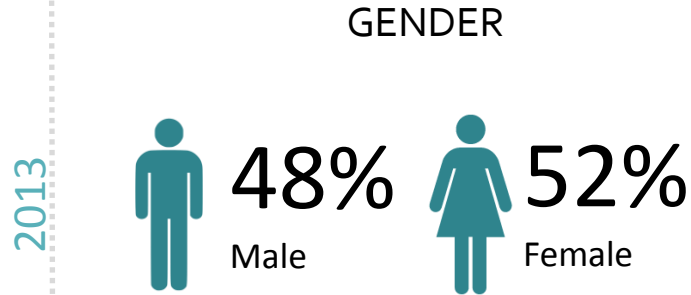
Additional Mentions (Order from L - R, highest to lowest)

Vacation/holiday/trip (non-specific)
Familiarity/know my way around
Easy/convenient (non-specific)
Social gathering/family reunion
Culture/cultural activities
Animals/wildlife
The outdoors/outdoor activities
Cruise/part of a cruise/pre-cruise
Christmas/Christmas holidays
Attended a seminar/workshop
Gambling/casino
Snow/fresh snowfall
Atmosphere (other & non-specific)
Fruit/to pick cherries
Beer/craft beer
Fishing
Biking/cycling

Parks/national parks
Train ride/like taking the train
Given to me/a gift/won a trip
Nightlife/bars
Forest/trees
Romantic place
European/English feel
Cleanliness/clean place
Nice/friendly people

DEMOGRAPHIC OF SURVEY RESPONDENTS

(Likely to visit Victoria or have recently visited and would spend at least \$250 per adult)



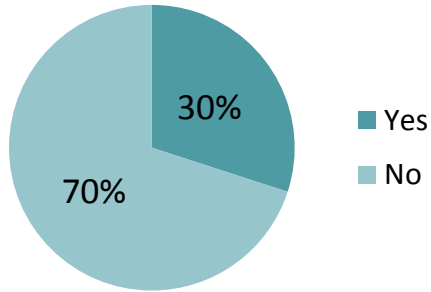
2013: N = 802 | 2011: N = 612

DEMOGRAPHIC OF SURVEY RESPONDENTS

(Likely to visit Victoria or have recently visited and would spend at least \$250 per adult)

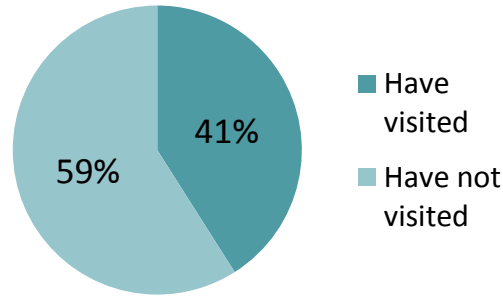
2013

KIDS IN HOME



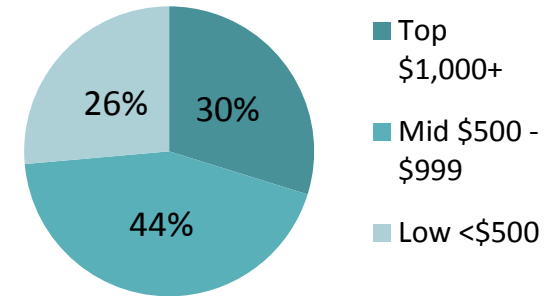
2013

VISITS TO VICTORIA

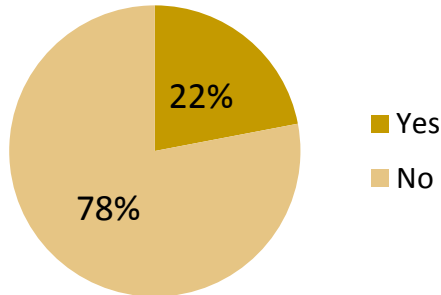


2013

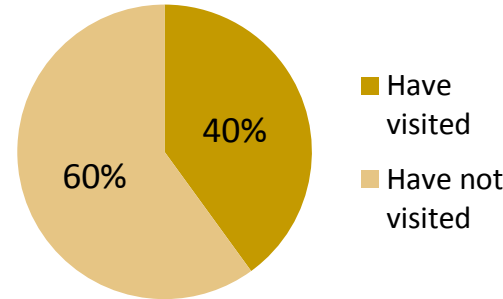
SPENDING HABITS



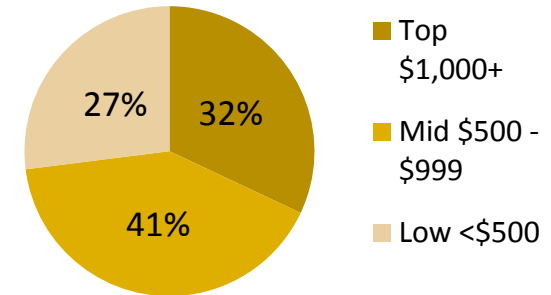
2011



2011



2011



2013: N = 802 | 2011: N = 612