



TOURISM VICTORIA
AUG 2014 EXIT SURVEY
PEAK SEASON



August 21 to 24, 2014

597
completed surveys

Non-residents of
Vancouver Island

5 minute
paper
survey

+/- 4
margin of error*

Points of surveying:



\$3-\$5
coffee card incentive

about our visitors...

who's the most valuable?

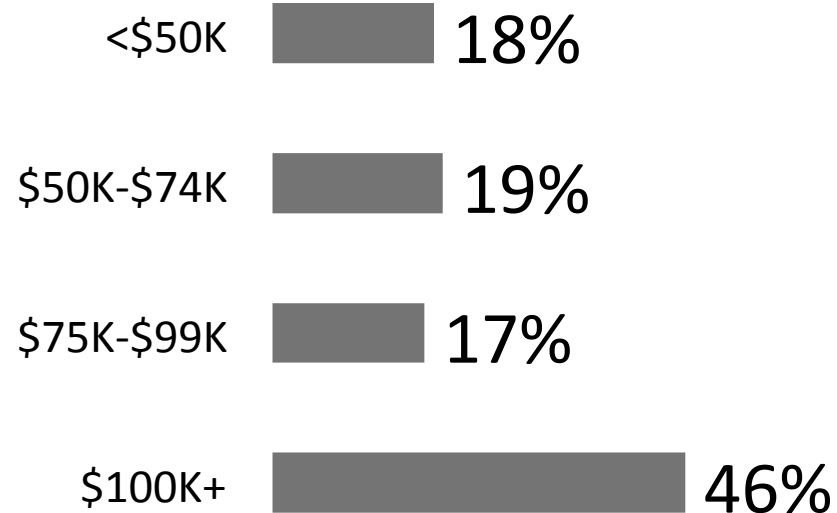
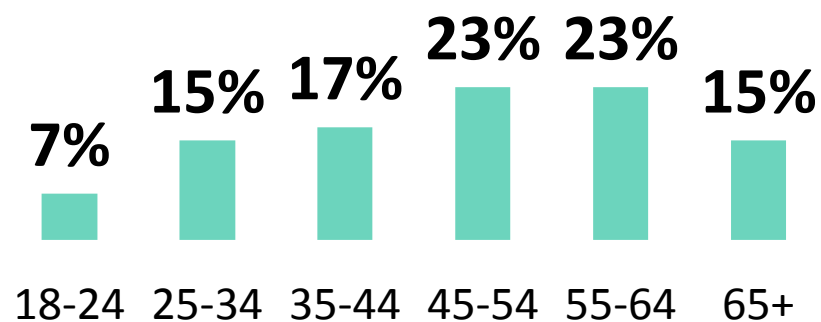
how is Victoria performing?

what attracts visitors?

where can we be better?

about our visitors...

 **52%**  **48%**





2.8
average party size



1-in-4 travel with kids.

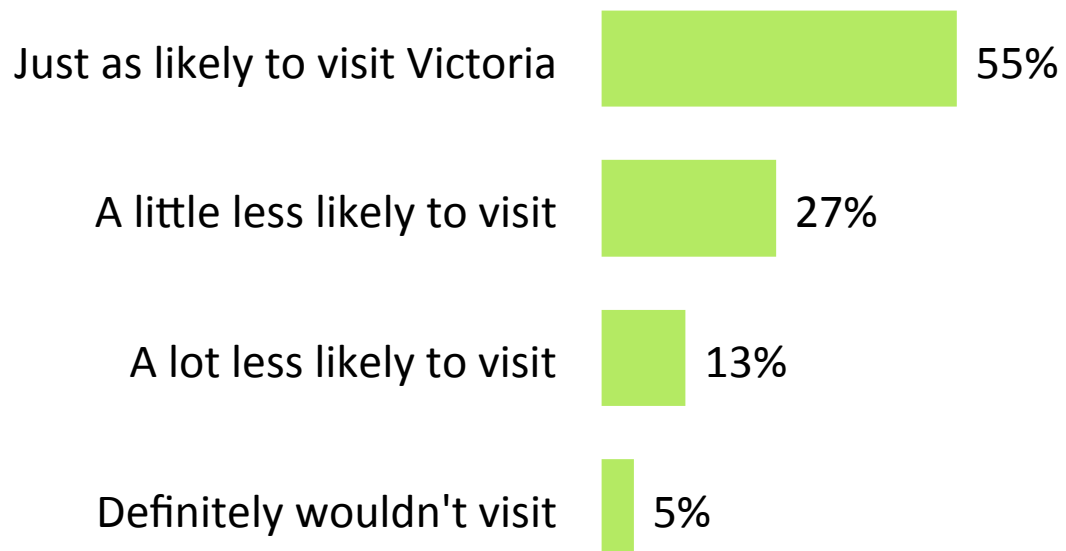


Nearly half of all overnight travellers stay at a hotel.

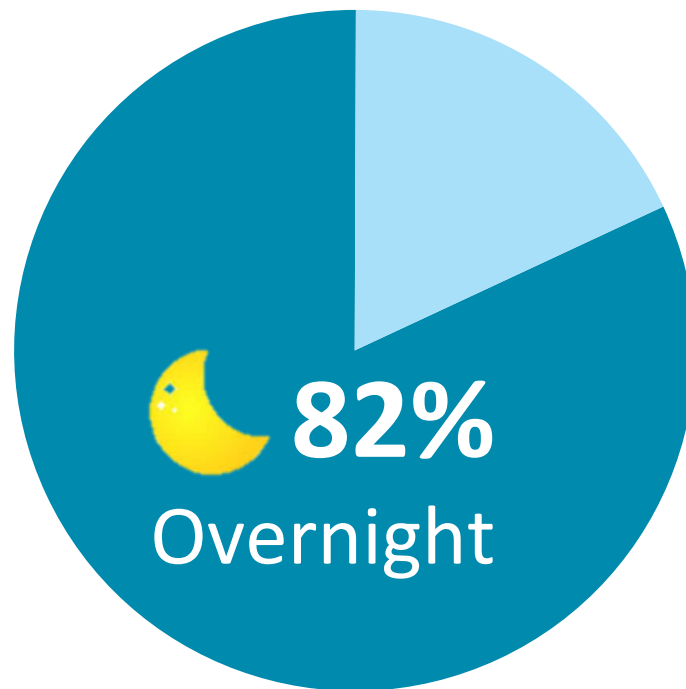
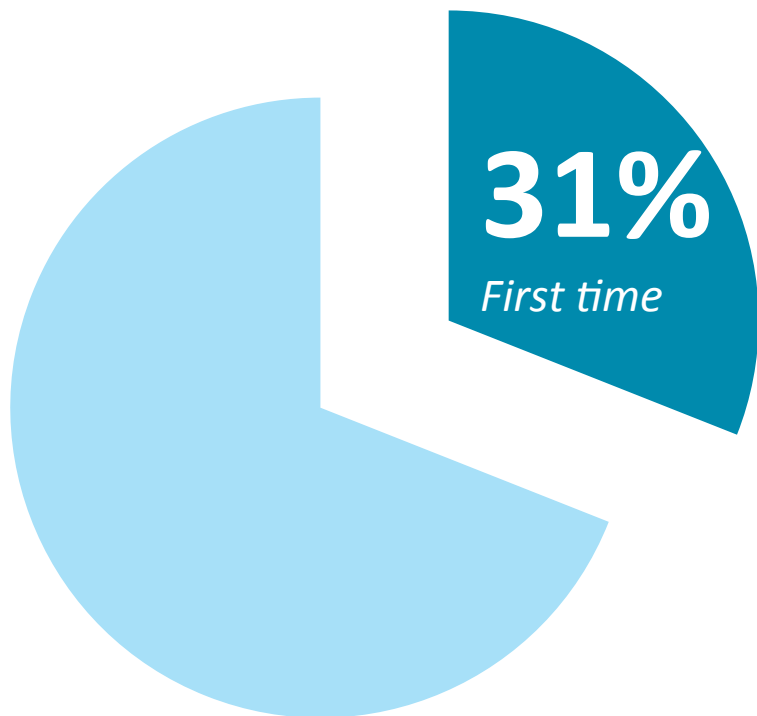
Of the \$990 average total trip spend...



Impact of bad weather



who's the most valuable visitor?



First time

\$1,047

Return

\$963



Overnight

\$1,115

\$212 (daily)

Day trippers



\$389

American/International Contribution to Revenue

46%
Victoria

VS

19%
Canada



Canadian

\$841



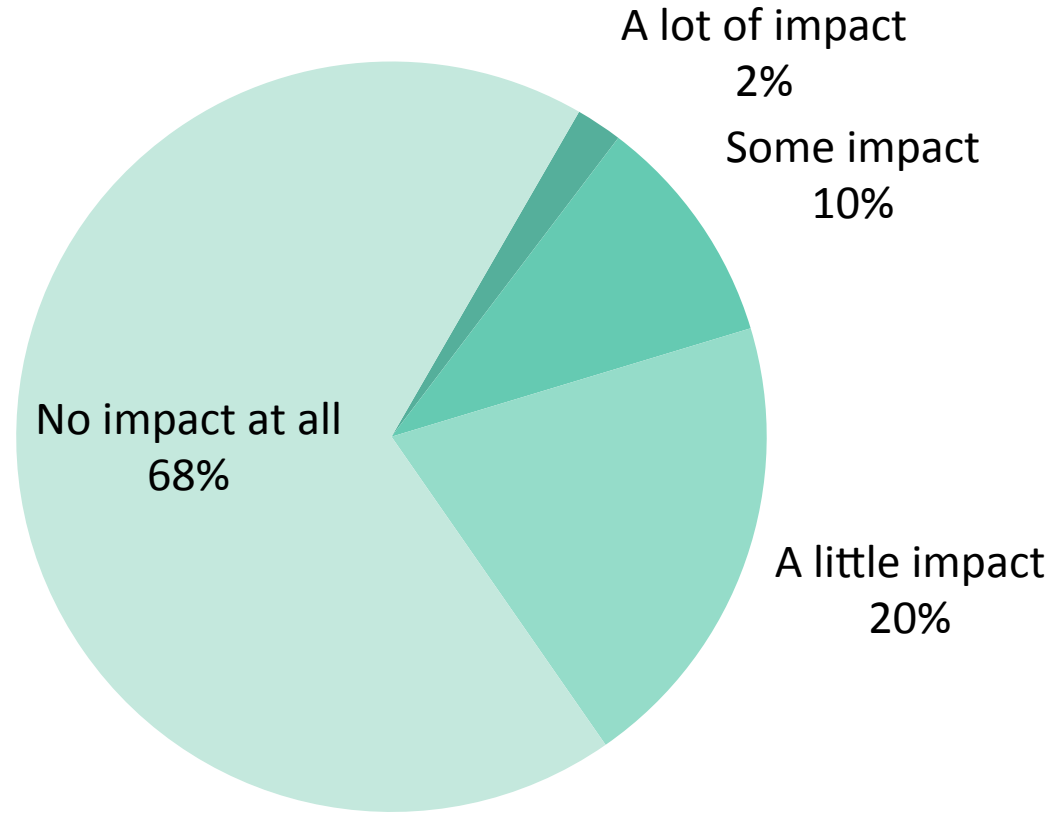
American

\$1,308



International

\$1,026





Countries without numbers = <1%

 **63%**

 **26%**



 **1%**

 **2%**
 **3%**



Countries	%
Canada	63%
USA	26%
International	11%

70%

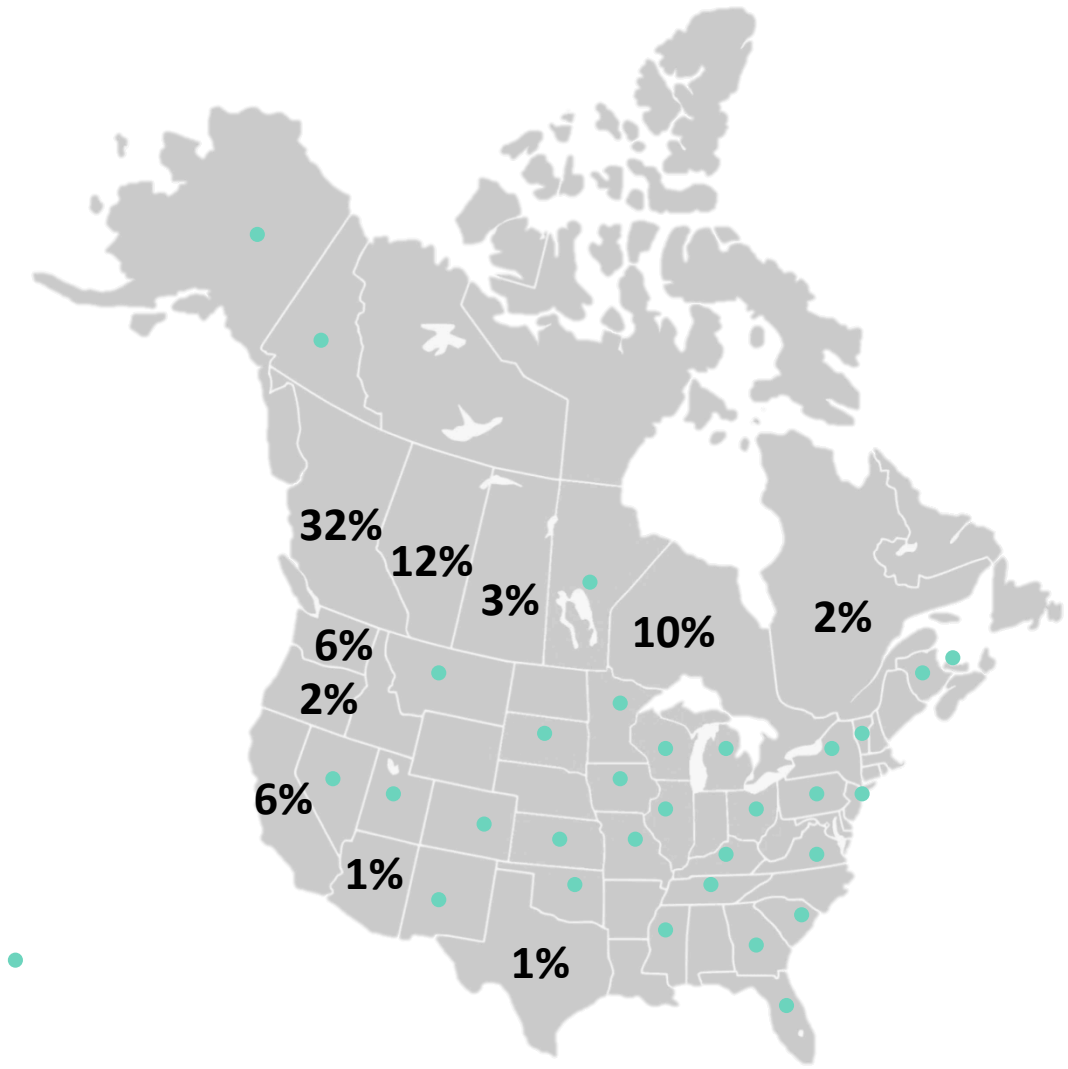


30%



Province/ State	%
BC	32%
AB	12%
ON	10%
WA	6%
CA	6%

● = *less than 1%*



how do visitors feel about Victoria?

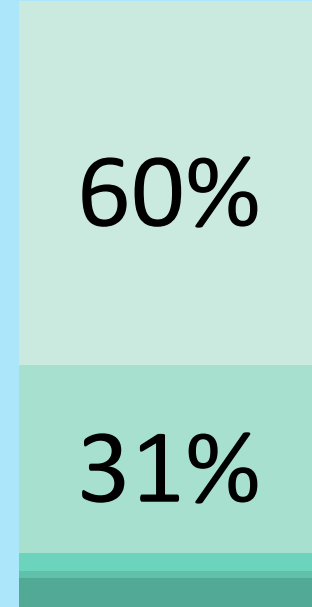
Most leave satisfied.

Very satisfied

60%

Satisfied

31%



+\$182 ↑



Satisfied travellers
spend more on
average per trip.

I/we spent
Too much time

2%

I/we had just
Enough time

53%

I/we spent not
Enough time

45%

what attracts visitors?

“Laid-back” Victoria is critical

Experiences anticipated

68%



Walking around the city

59%



Relaxing/unwinding

53%



Restaurants/food & beverage

Experiences done

68%




60%



60%





A smiling woman with dark hair is in a kitchen. Above her is a stainless steel range hood with four black knobs. In the foreground, there are two orange pots on a stove. The background shows a white wall with a metal rack holding various kitchen utensils like a whisk and a spatula.

74%

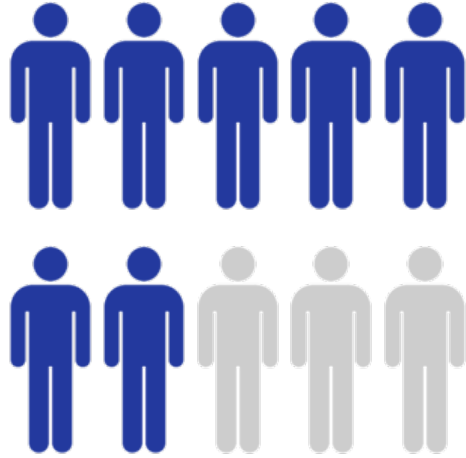
the way you cook
says a lot about
who you are

66%

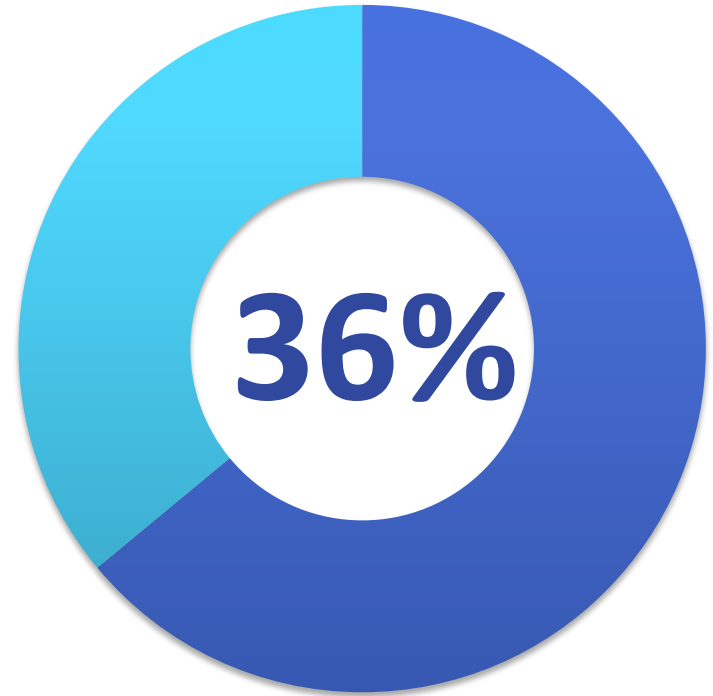
you can tell a lot
about a person
by what they
bring to a potluck

61%

the dish they
bring to a party is
more important
than what they
wear



More interested in
food than 5-10 years
ago

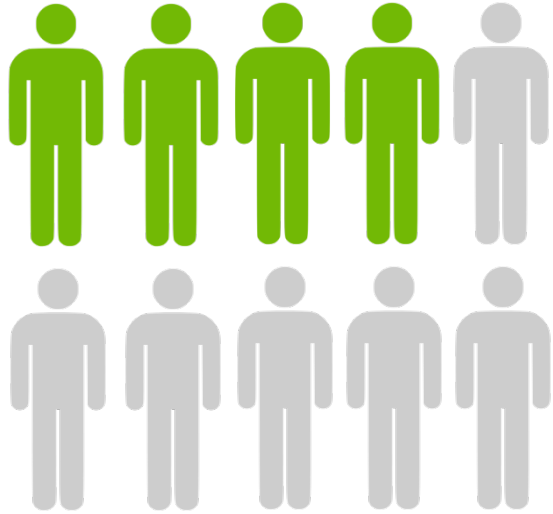


Are food connected

don't call them foodies



Attractions also very important

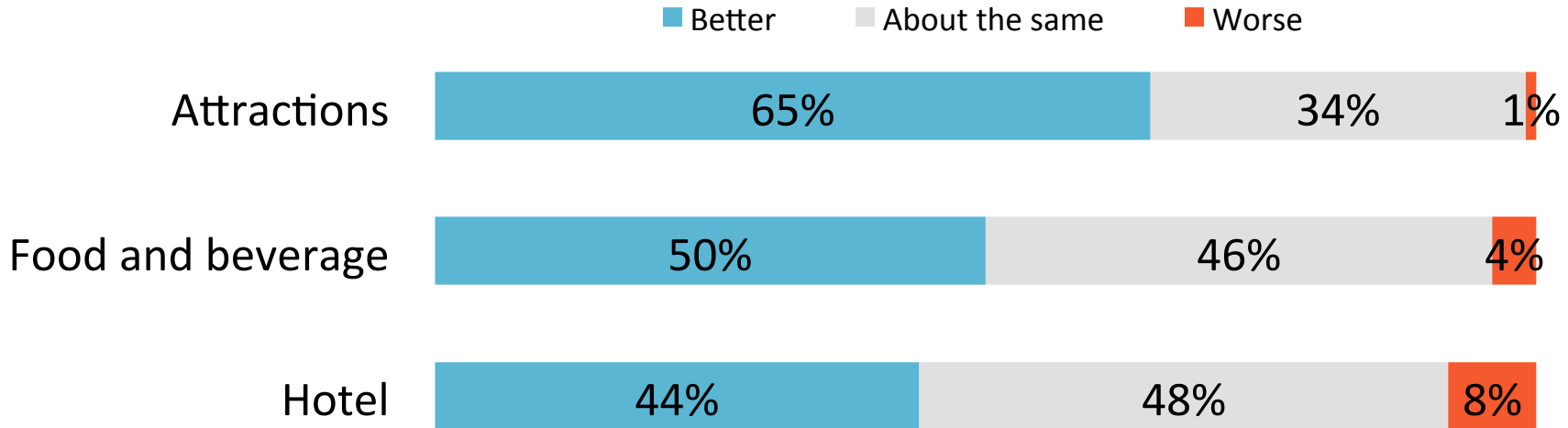


99%

Butchart Garden emerges
as top unaided most
enjoyable activity.



Performance compared to other Pacific Northwest destinations



Also, secondary experiences...



1. Marine wildlife viewing



2. Outdoor recreation



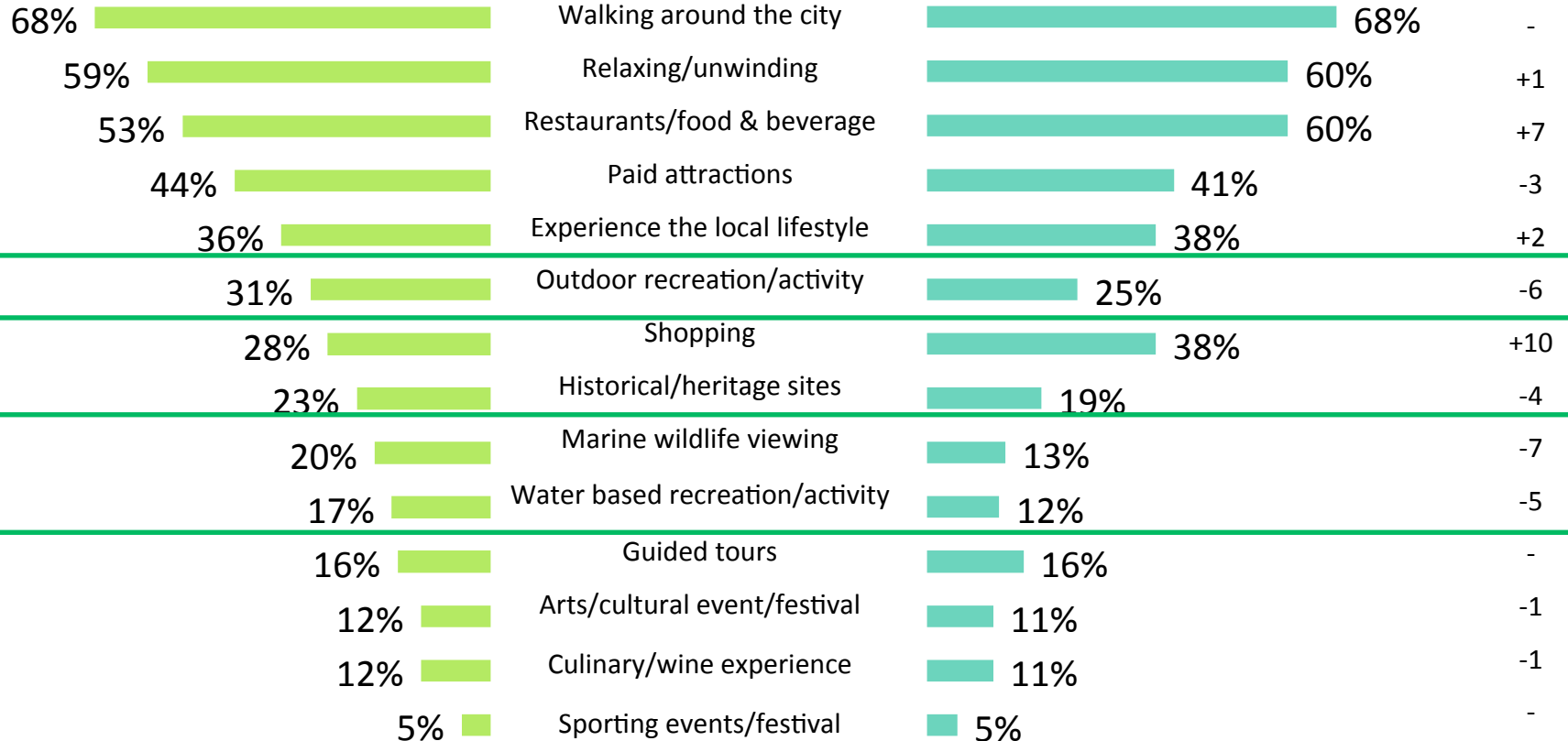
3. Water based recreation

EXPERIENCES ANTICIPATED AND ACTUALLY DONE

+/- PP from
planned and
actual

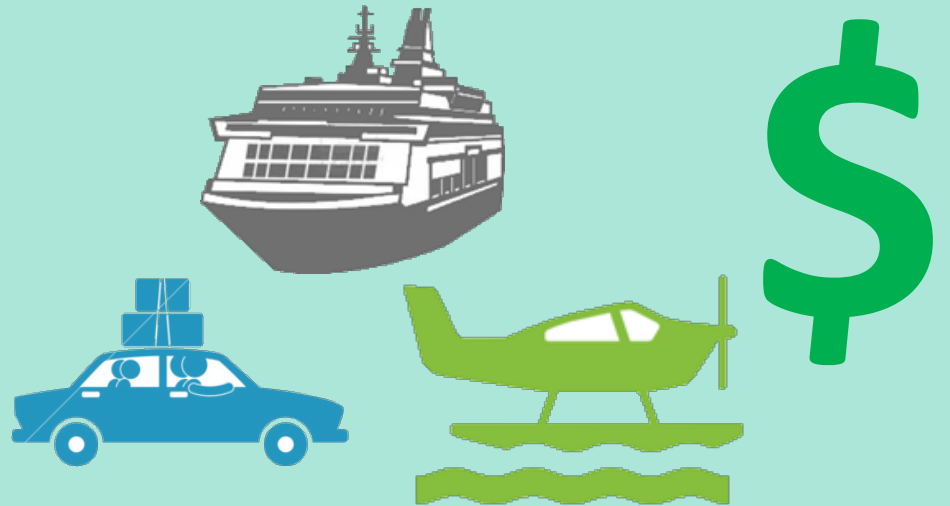
EXPERIENCES LOOKING FORWARD TO

EXPERIENCES DONE

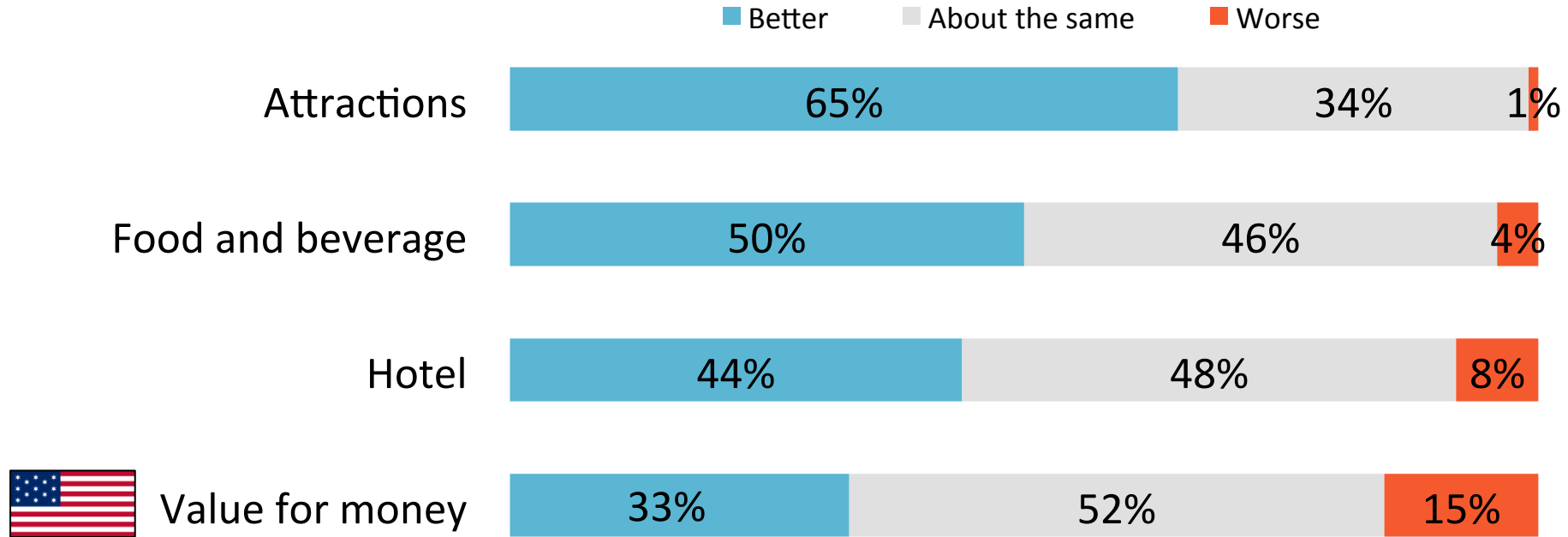


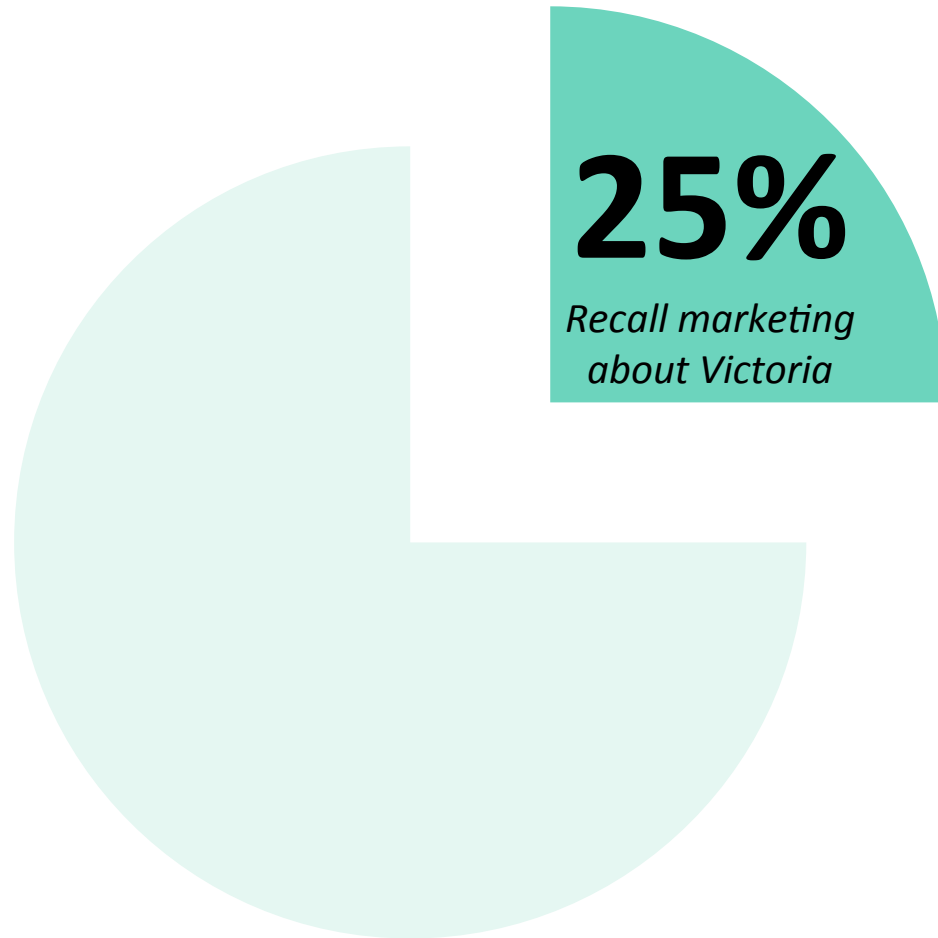
where can we be better?

Affordability and accessibility.



Performance compared to other Pacific Northwest destinations





Marketing = visitor spend.

+\$147 ↑



Those who recall
marketing are more
likely to be satisfied.

96%

vs.

90%



Those who recall
marketing more likely
to say better or same
value.

91%

VS.

83%

23%

vs.

16%



Travellers who recall marketing are more likely to be aware of deals and preferred pricing.



Those aware of
specials/deals are
more likely to be
very satisfied

71%

VS.

58%



Those aware of
specials/deals are
more likely to say
better or same
value.

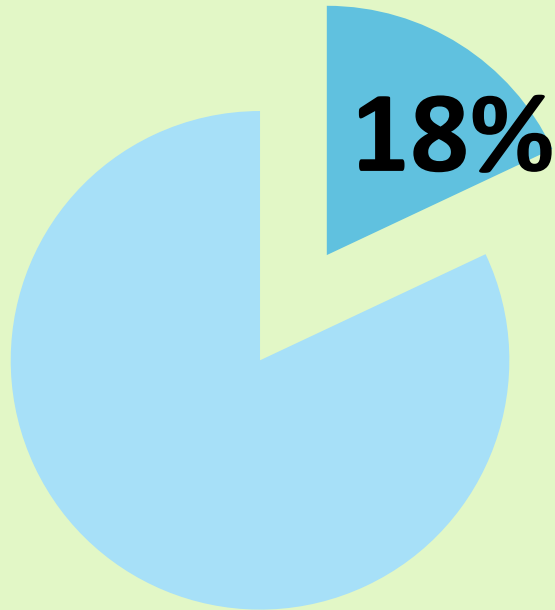
90%

VS.

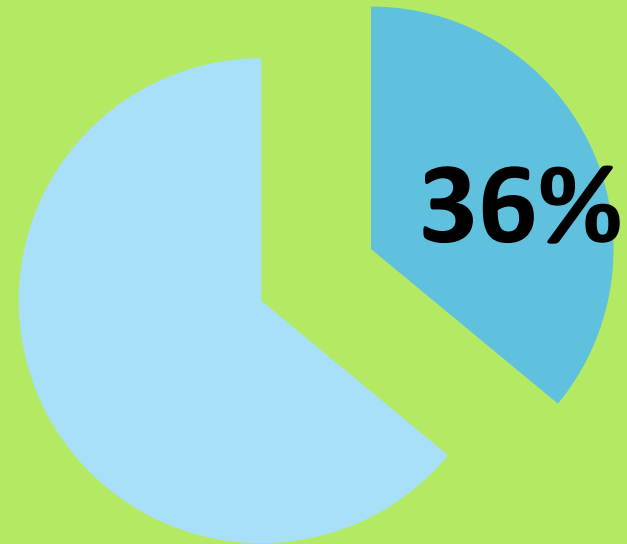
84%

Awareness of special deals and preferred pricing at the Visitor Centre...

Among all travellers



Among travellers who visit the Visitor Centre





Those who visited
the visitor center
more likely to say
better or same
value.

90%

VS.

85%

Nearly 2-in-10 travellers
visited the Visitor Centre.



recap

who to target?

- Americans
- First timers
- Overnight travellers

what brings them?

1. Laid-back. Relaxation
2. Attractions
3. Activities they missed

where can we improve?

1. More marketing!
2. Deals/preferred pricing
3. Visits to the visitor centre

Thank you!

Questions and discussion.