



TOURISM VICTORIA OCT 2013 EXIT SURVEY



TOURISM
VICTORIA 

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OBJECTIVES

Identify Victoria visitors geographic origin to inform marketing.

Measure specific behaviours such as time spent, spend, and activities.

Explore areas of delight and challenge for visitors when visiting Victoria.

Profile visitors demographics.

METHODOLOGY

5 minute paper
survey

605 completed
surveys

Margin of error*:
+/-4.0%

Fielded between
October 24 to 27,
2013

Surveying from:

- BC Ferries Swartz Bay
- Victoria International Airport
- Coho
- Clipper

Non-residents of Vancouver
Island

Incentive of \$3 - \$5 coffee
card

This is the first of two exit surveys. This is the off season study. A high season study will be conducted in July 2014. All of the results in this report are indicative of the time of year.

KEY INSIGHTS

KEY INSIGHTS

While the US remains an attractive target for Victoria, it is evident that Canadian visitors are very important.

- Canadian travellers accounted for 7 out of 10 travellers to Victoria in October of 2013.
- Secondary research and Tourism Victoria's brand study have however shown that American tourism to Victoria is no longer declining. With expected improvement (albeit slow) to the US economy and projected weakening of the Canadian dollar, we may see a rise in American visitors.

Regardless of travellers' country of origin, it does not influence their overall spending total. This means Canadian tourists are equally lucrative.

- American travellers are more likely to travel for vacation or pleasure. However, regardless of purpose, they spend the same amount as a Canadian or an international traveller.
- The average travel party spends around \$720, regardless of country of origin.

KEY INSIGHTS

In Victoria, travellers enjoy experiences such as walking around the city, dining out and relaxing most. It is important Victoria continues to leverage its unique trait of being a relaxing destination.

- Tourism Victoria's Brand study identified relaxation as Victoria's #1 differentiator and strength. At the same time, relaxing is one of the top 3 experiences anticipated by recent visitors. Clearly, this is an attribute that Victoria must leverage.
- Pain points continue to be transportation and affordability as supported by the 2013 Brand Study.
 - Victoria needs to continue improving affordability and perceptions of accessibility. Promotions have proven to be motivating (even expected) by travellers, and anything that can help bolster perceptions of ease of access will go a long way.

Overall, 9 out of 10 travellers leave Victoria satisfied, maintaining similar levels with September 2010.

- Visitors enjoyed the restaurants, food & drinks, walking around Victoria, and seeing friends and family most.
 - Notably, those who are very satisfied are more likely to feel as though they did not have enough time. This points to an opportunity to advertise and promote to departing visitors to encourage a longer, future trip to Victoria.
- Among the small number who left unsatisfied, areas of challenge were weather, BC Ferries, affordability and accommodations, consistent with findings revealed in previous years of exit surveys.

KEY INSIGHTS

Overnight travellers are more likely to be very satisfied compared to day trippers. The longer length of stay allows them to authentically experience the city.

- In particular, overnight travellers are more likely to spend time at the city's restaurants/food and beverage establishments, as well as relaxing/unwinding. Clearly, these particular activities lead to greater satisfaction, and should be leveraged to encourage longer stays.
 - Also, overnighers are more likely to walk around the city, go shopping, and experience the local lifestyle.
- As can be expected, overnight travellers spend more per trip than day trippers. It is a win/win, with the traveller typically being more satisfied with a longer trip and Tourism Victoria's members benefiting from greater spend.

Marine wildlife viewing and water based activities may represent secondary leverage points to encourage future visitation.

- While walking around the city, restaurants/food/beverage and relaxing are top activities, marine wildlife and water based activities show the largest gaps in anticipated vs. actual activity.
- Given the large number who say they did not have enough time in Victoria, these might be leverage points to encourage a return trip.

KEY INSIGHTS


Tourism Victoria should tap into the most popular activities to springboard greater spend and trial of new experiences.


- Travellers typically are looking for a mix of new/old experiences (60%), or just the same experiences period (33%). This means the most popular attractions and activities represent significant marketing opportunities to connect to new experiences and encourage a longer stay (or longer future stays).

It is evident that marketing performed by Tourism Victoria itself and members pays dividends.

- Those who remember seeing any kind of marketing about Victoria spend on average \$80 more on attractions, shopping and accommodations compared to visitors with no marketing recall.
- As well, marketing recall is higher among groups where Victoria has targeted to grow. Specifically younger travellers (18-24), international visitors and those from Washington state.

DETAILED FINDINGS

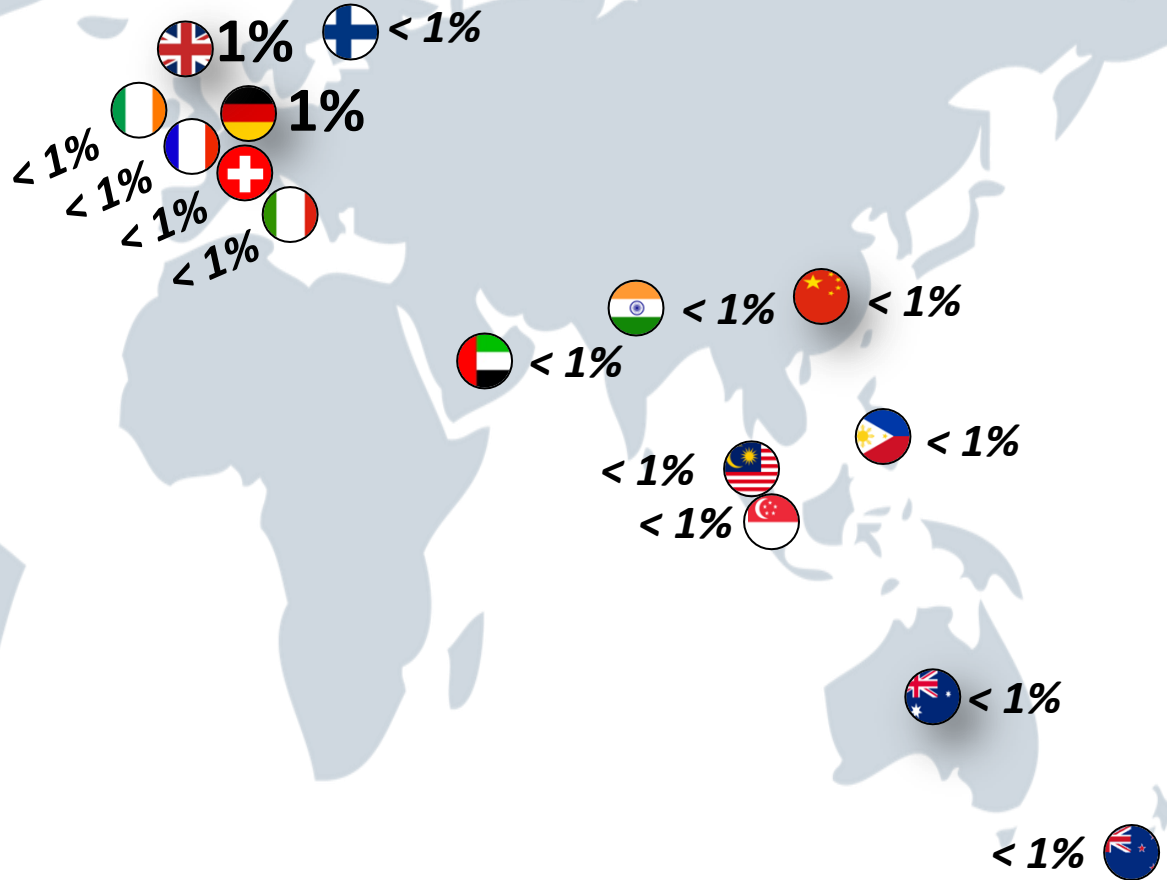
 = indicates a significantly higher value

 = indicates a significantly lower value

VISITOR ORIGIN

VISITOR COUNTRY OF ORIGIN

Countries	%
Canada	74%
USA	21%
International	5%



VISITOR PROVINCE/STATE OF ORIGIN

A map of the United States showing the percentage of visitors by state of origin. The map is color-coded by percentage, with a legend on the left. Blue dots are placed on the map to represent specific data points. The percentages are as follows:

State	Percentage
California	48%
Washington	11%
Oregon	3%
Idaho	1%
Montana	8%
Wyoming	2%
Utah	8%
Arizona	4%
New Mexico	2%
Texas	2%
Florida	2%
Illinois	2%
Michigan	2%
Indiana	2%
Ohio	2%
Pennsylvania	2%
New York	2%
Massachusetts	2%
Connecticut	2%
Delaware	2%
Maryland	2%
Virginia	2%
North Carolina	2%
South Carolina	2%
Georgia	2%
Alabama	2%
Mississippi	2%
Louisiana	2%
Arkansas	2%
Oklahoma	2%
Nebraska	2%
Kansas	2%
Minnesota	2%
Wisconsin	2%
Michigan	2%
Indiana	2%
Ohio	2%
Pennsylvania	2%
New York	2%
Massachusetts	2%
Connecticut	2%
Delaware	2%
Maryland	2%
Virginia	2%
North Carolina	2%
South Carolina	2%
Georgia	2%
Alabama	2%
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Michigan	2%
Indiana	2%
Ohio	2%
Pennsylvania	2%
New York	2%
Massachusetts	2%
Connecticut	2%
Delaware	2%

Province /State	%
BC	48%
AB	11%
WA	8%
ON	8%

- = *less than 1%*

2013: N=604

VISITOR CITY OF ORIGIN

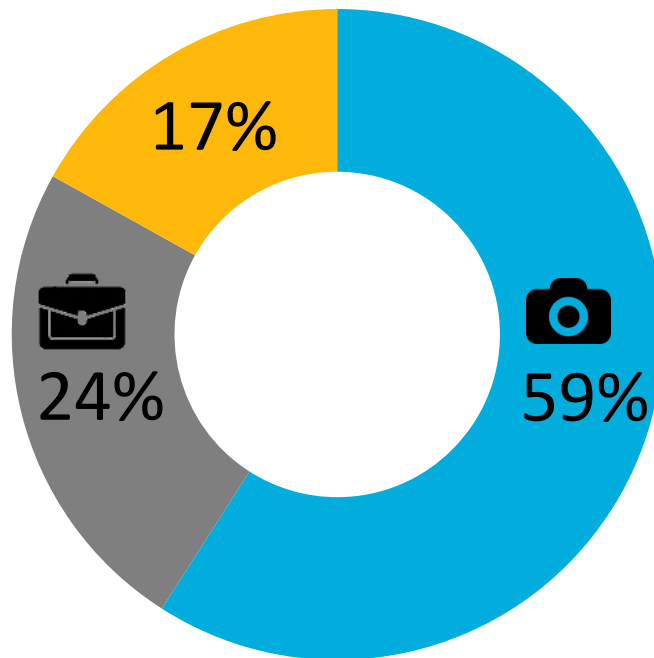
TOP 3 CITIES : VANCOUVER, SURREY, AND CALGARY

Cities	%	Province/State	Cities	%	Province/State
Vancouver	11%	BC	Port Coquitlam	< 1%	BC
Surrey	5%	BC	White Rock	< 1%	BC
Whistler	3%	BC	Terrace	< 1%	BC
North Vancouver	3%	BC	Coquitlam	< 1%	BC
Burnaby	2%	BC	Maple Ridge	< 1%	BC
Abbotsford	2%	BC	Revelstoke	< 1%	BC
Kamloops	2%	BC	Calgary	5%	AB
Delta	2%	BC	Edmonton	< 1%	AB
Langley	2%	BC	Fort McMurray	< 1%	AB
Richmond	2%	BC	Ottawa	< 1%	ON
Kelowna	1%	BC	Toronto	< 1%	ON
Summerland	1%	BC	Regina	1%	SK
New Westminster	< 1%	BC	Seattle	2%	WA

TRAVEL MOTIVATORS & EXPERIENCES

REASON FOR TRIP: PLEASURE VS. BUSINESS

Was your trip to Victoria for...



Business travellers are more likely to be:

- Canadian
- Commuting from Swartz Bay or the airport
- Male
- Younger than 55 years old

Vacation/pleasure travellers are more likely to be:

- American
- 65 years old and up

■ Vacation/pleasure ■ Business ■ Mix of business/pleasure

N=600

MAIN PURPOSE OF TRIP

What was the main purpose of your trip to Victoria?

Visiting family/friends 34%

Conference, meeting or incentive program 17%

Getting away from usual surroundings 14%

Other business-related reason 13%

A particular attraction 5%

Sporting event/festival 3%

Passing through to another destination 3%

Arts/cultural event/festival 2%

Recreation activity 2%

Other 8%



More likely for overnight
travellers

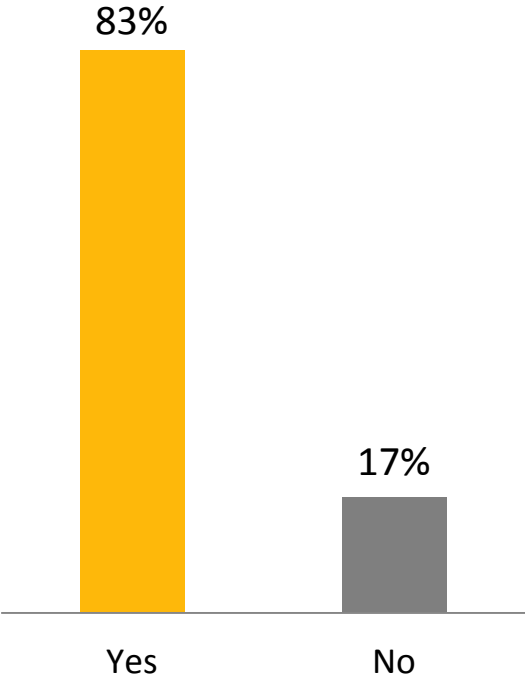
Americans more likely to visit
for a particular attraction.



More likely for day
trippers

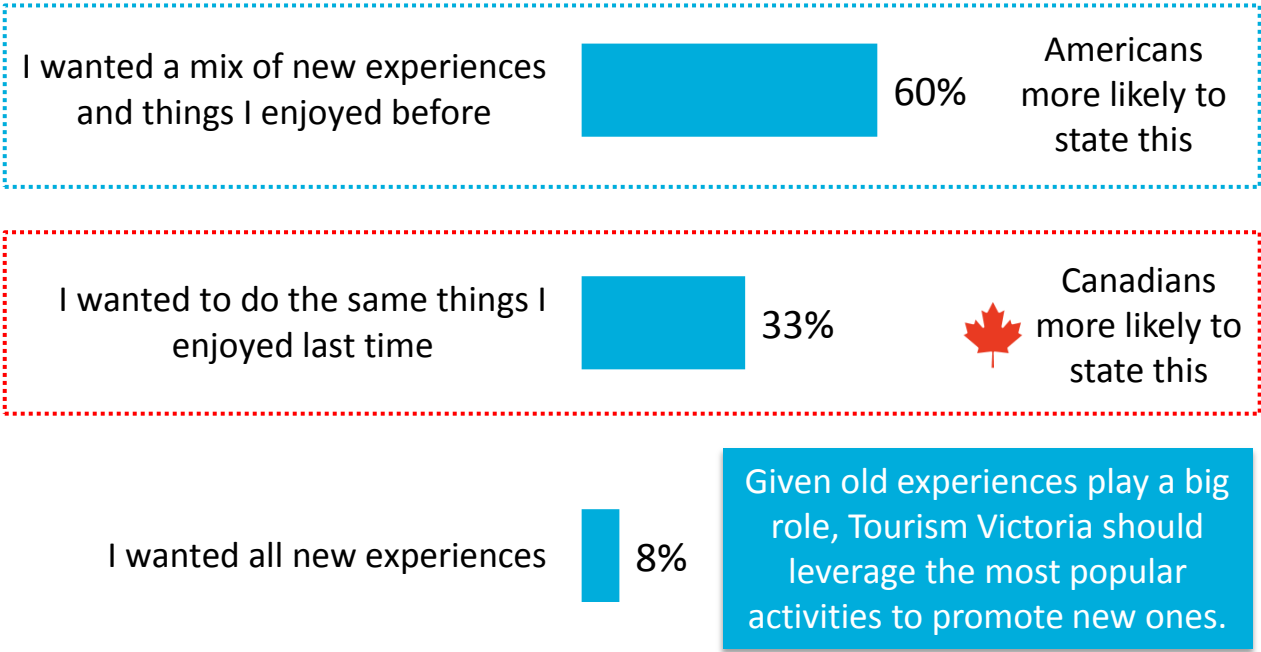
PREVIOUS VISITATION TO VICTORIA AND APPROACH FOR THIS VISIT

Have you been to Victoria before this trip?



2013: N=603

Compared to your last trip to Victoria, which best describes your approach for this visit?



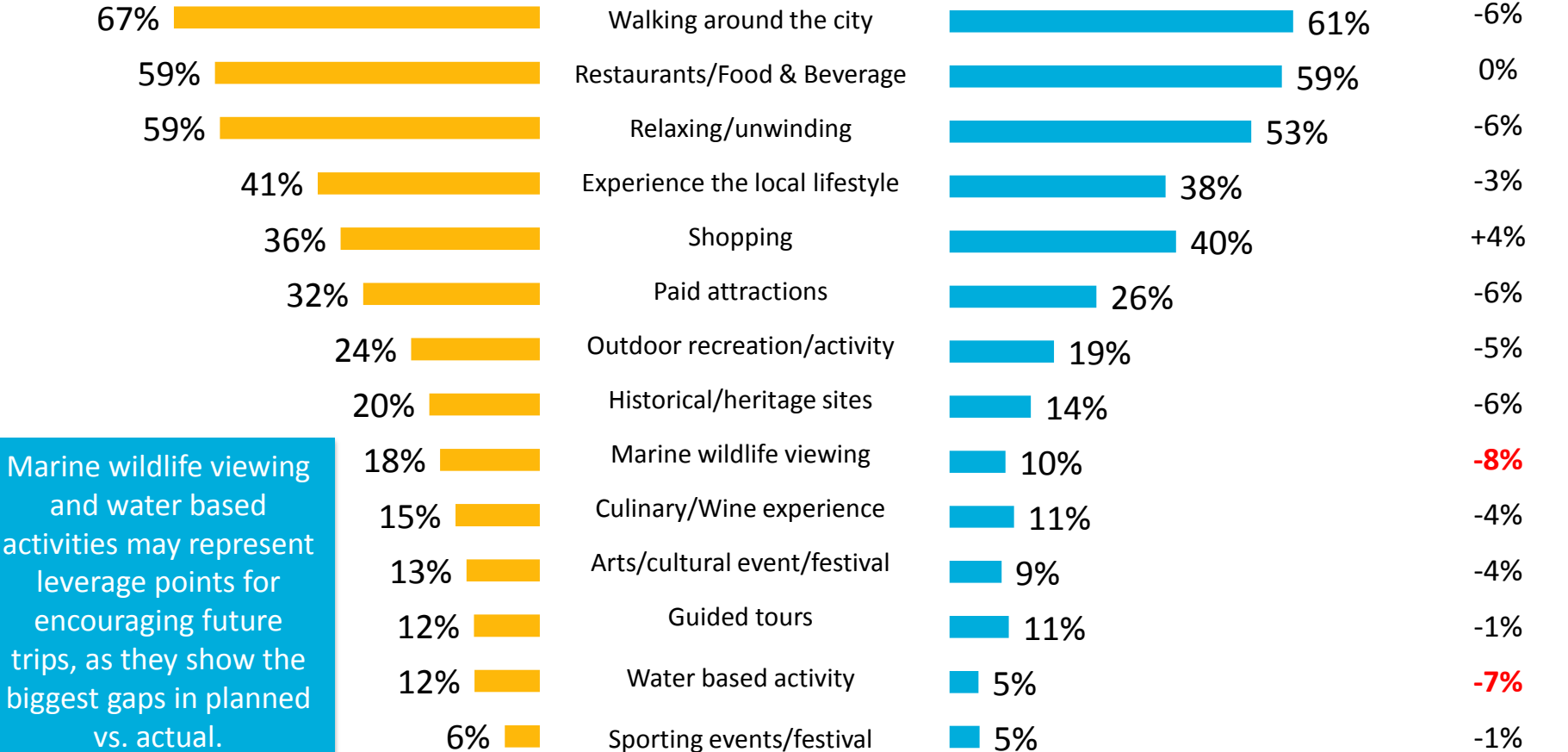
N=460 (includes only repeat visitors)

EXPERIENCES ANTICIPATED AND ACTUALLY DONE

When coming to Victoria, what types of experiences were you most looking forward to?

What did you actually do?

+/- from planned and actual



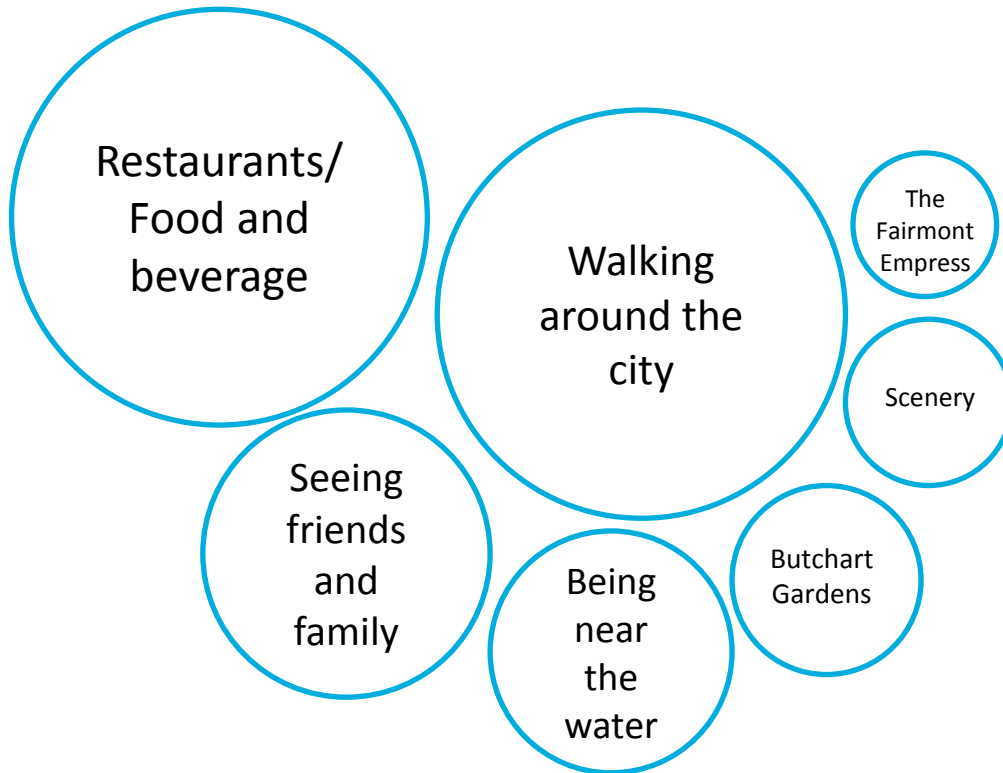
Marine wildlife viewing and water based activities may represent leverage points for encouraging future trips, as they show the biggest gaps in planned vs. actual.

EXPERIENCES ACTUALLY DONE BY COUNTRY OF ORIGIN

	Total	Canadians	Americans	International
Walking around the city	61%	56%	70%	83%
Restaurants/Food & Beverage	59%	58%	64%	41%
Relaxing/unwinding	53%	51%	60%	57%
Shopping	40%	39%	40%	56%
Experience the local lifestyle	38%	35%	43%	67%
Paid attractions	26%	20%	45%	43%
Outdoor recreation/activity	19%	19%	16%	18%
Historical/heritage sites	14%	14%	15%	16%
Culinary/Wine experience	11%	11%	10%	20%
Guided tours	11%	8%	17%	14%
Marine wildlife viewing	10%	10%	8%	19%
Arts/cultural event/festival	9%	10%	6%	7%
Sporting events/festival	5%	6%	4%	3%
Water based recreation/activity	5%	5%	4%	14%
Sample (N)	604	414	158	32

MOST ENJOYED ACTIVITIES

*Out of all the things you did in Victoria, what did you enjoy the most?
Displaying top 6 mentions.*

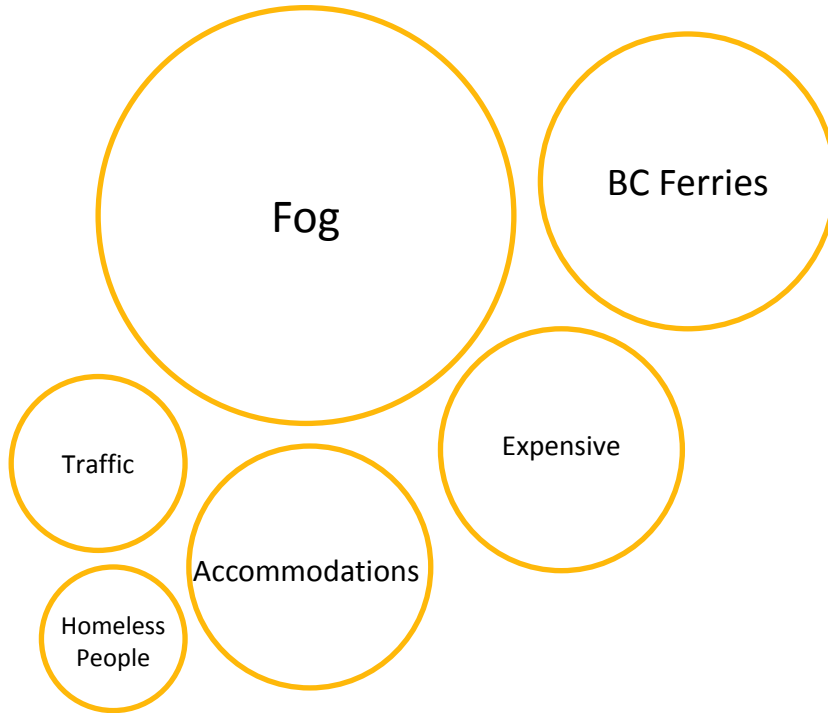


Increase Victoria's appeal by strengthening perceptions of Victoria's restaurants. As supported by the 2013 Brand Study, foodies are increasing in proportion.

*"Amount of great places to eat and
ambiance, brick buildings and
unique shops."*

AREAS OF DISAPPOINTMENT

*Did anything not meet your expectations in Victoria?
Displaying top 6 mentions.*



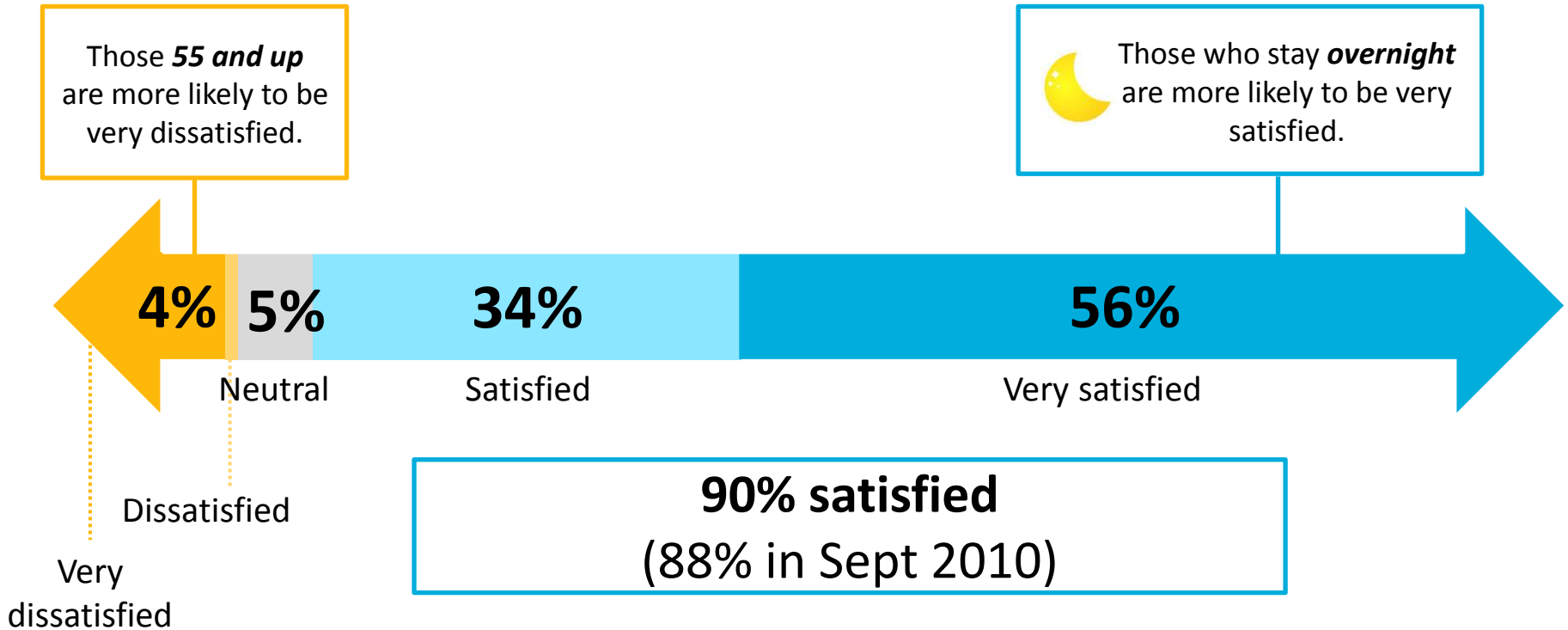
As supported by Tourism Victoria's brand study, while perceptions of affordability and accessibility have improved since 2010/2011, there is still work to be done.

"Act of god! Fog put a damper on our vacation."

2013: N=173 (includes only those who answered) / 2010: N=NA

SATISFACTION WITH TRIP

Overall, how satisfied were you with your trip to Victoria?

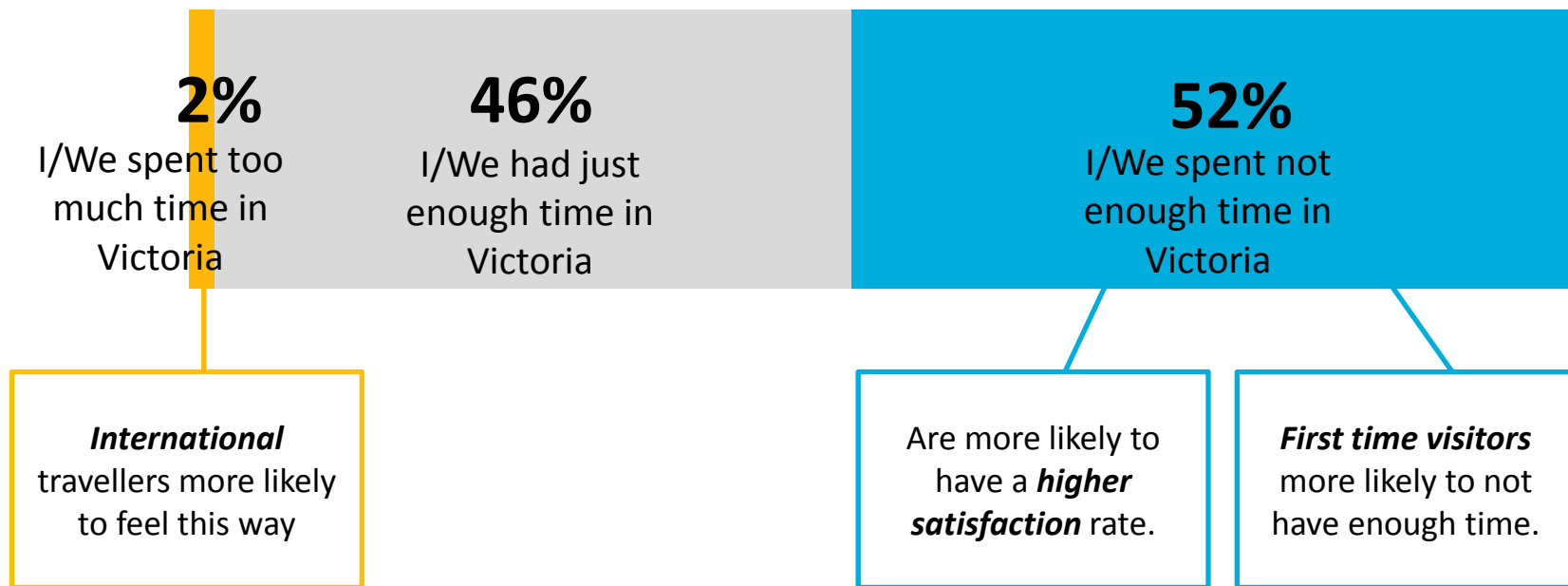


2013: N=603 / 2010: N=634

*Note: Refers to September 2010, Tourism Victoria Exit Survey.

TIME SPENT IN VICTORIA: ENOUGH/NOT ENOUGH

And thinking of the time you spent in Victoria, which of the following best fits how you feel?



WITH MORE TIME, OVERNIGHT TRAVELLERS DO MORE

	Total	Day Trippers	Overnights
Walking around the city	60%	45%	63%
Restaurants/Food & Beverage	59%	33%	64%
Relaxing/unwinding	53%	33%	57%
Shopping	40%	28%	42%
Experience the local lifestyle	38%	26%	40%
Paid attractions	26%	19%	27%
Outdoor recreation/activity	18%	6%	20%
Historical/heritage sites	14%	10%	15%
Culinary/Wine experience	11%	5%	12%
Guided tours	10%	9%	10%
Marine wildlife viewing	9%	8%	10%
Arts/cultural event/festival	9%	7%	10%
Sporting events/festival	5%	12%	4%
Water based recreation/activity	5%	2%	5%
Sample (N)	592	89	503

TRIP CHARACTERISTICS

DAY TRIPPERS VS. OVERNIGHTERS

It should be noted that day trippers are just as likely to have been to Victoria as overnights. As such, this group is not necessarily inexperienced with the city.

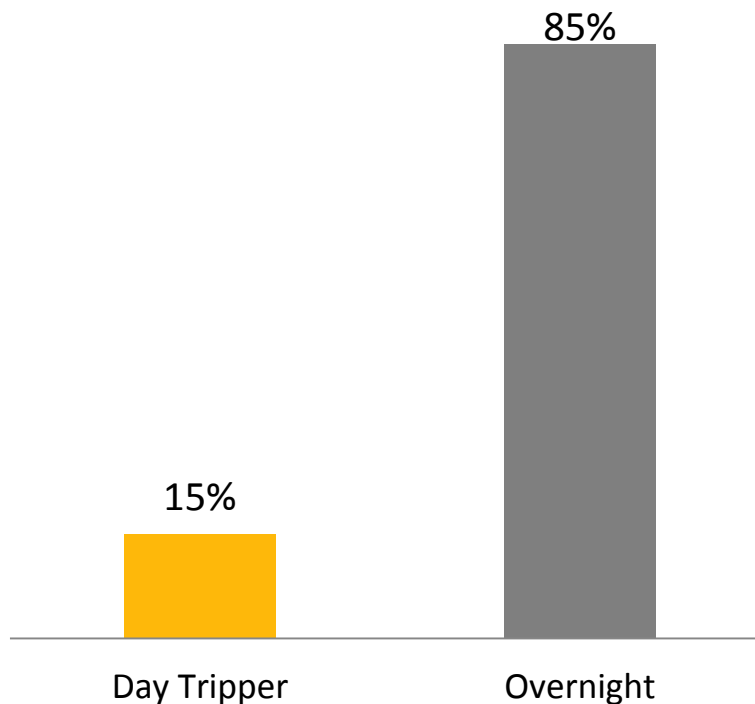
Day trippers are more likely to be:

- Younger
- Be from British Columbia
- Earn less
- Seek new experiences



Overnight travellers are more likely to be:

- Older
- Be from Alberta
- Have no kids



NIGHTS SPENT IN VICTORIA

How many nights did you spend in Victoria during this trip?

1 Night 24%

More likely to feel as though they did not spend enough time in Victoria

2 Nights 30%

The large majority of trips last 2-3 nights. As such, marketed itineraries and trips should focus on these lengths.

3 Nights 17%

4 to 5 Nights 15%

6 to 7 Nights 6%

8+ Nights 9%



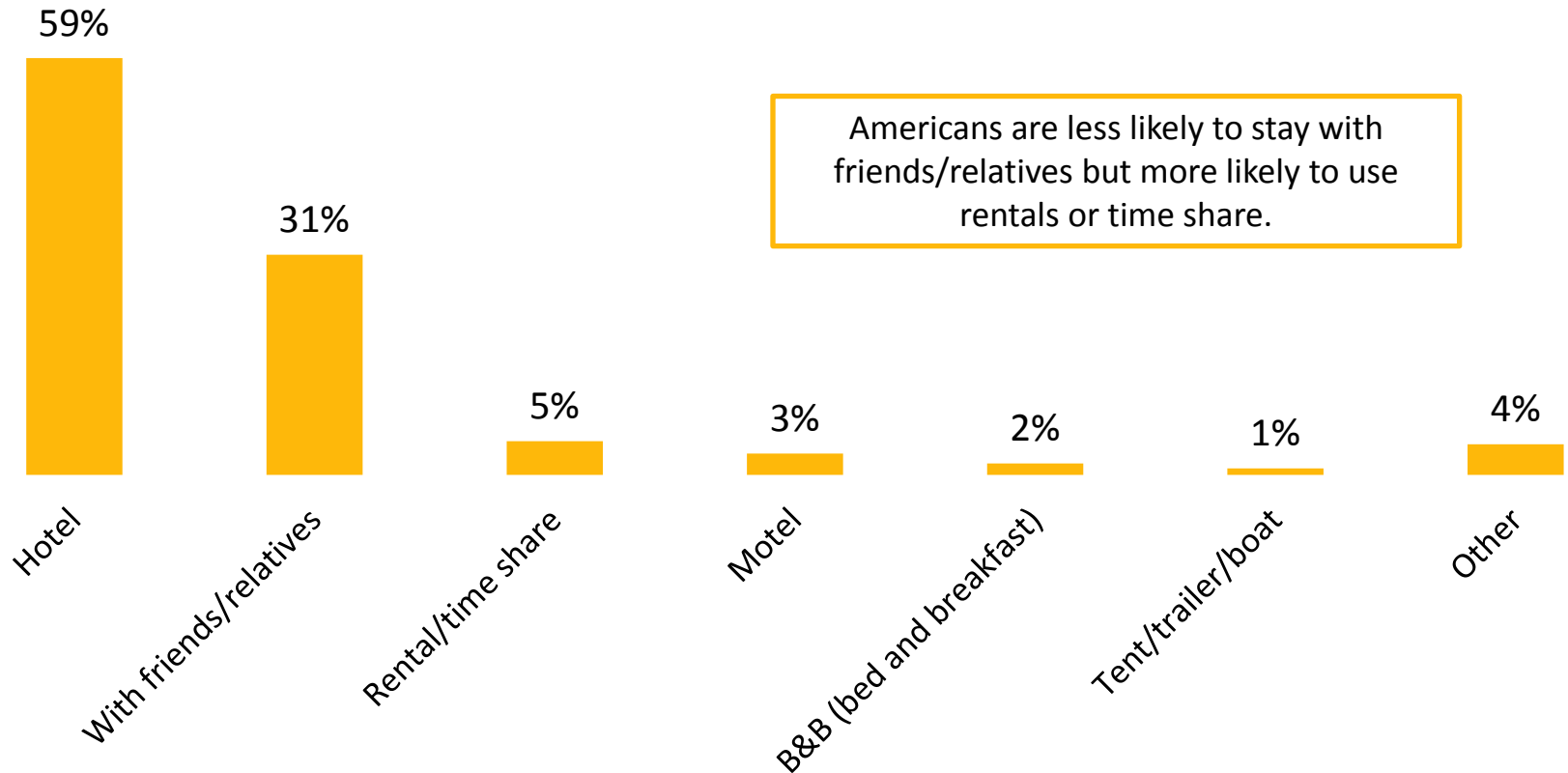
Those who commute via airport tend to stay longer. For strategic marketing, Tourism Victoria should continue to highlight activities that could fit over multiple days or with a business schedule.

2013: N=502 (includes only those who stayed overnight)

*Note: Outliers were removed for those who stay > 60 days.



ACCOMMODATIONS USED

What type of accommodation did you stay at?






N=500 (excludes those who did not select an accommodation)

TRIP SPEND

	Average	 Canadians	 Americans	International
Accommodation	\$214	\$214	\$211	\$217
Food/beverage	\$195	\$195	\$197	\$185
Transportation	\$146	\$153	\$139	\$83
Shopping	\$110	\$109	\$99	\$165
Attractions, recreation, entertainment	\$45	\$42	\$51	\$68
Other	\$7	\$9	\$3	\$7
Total	\$717	\$721	\$701	\$725
Sample (N)	Varies	Varies	Varies	Varies

*Note: Outliers were removed: Accommodations >\$1,500, Transportation >\$1,500, Food >\$1,500, Shopping >\$1,000 and Other >\$1,000.

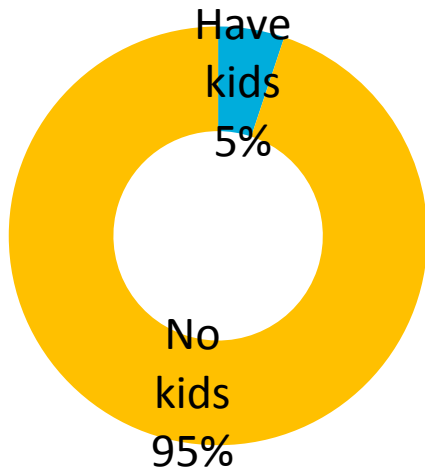
DAY TRIPPERS SPEND MORE ON AVERAGE PER DAY, WHILE OVERNIGHT TRAVELLERS SPEND MORE PER TRIP

	 Day Trippers	 Overnight	Overnight Avg. \$/day 
Accommodation	\$0	\$247	\$63
Food/beverage	\$74	\$211	\$54
Transportation	\$120	\$152	\$39
Shopping	\$44	\$120	\$31
Attractions, recreation, entertainment	\$17	\$50	\$13
Other	\$1	\$8	\$2
Total	\$255	\$788	\$201
Sample (N)	Varies	Varies	Varies

*Note: Outliers were removed: Accommodations >\$1,500, Transportation >\$1,500, Food >\$1,500, Shopping >\$1,000 and Other >\$1,000.

PARTY COMPOSITION & SIZE

Not including yourself, how many others are travelling with you?

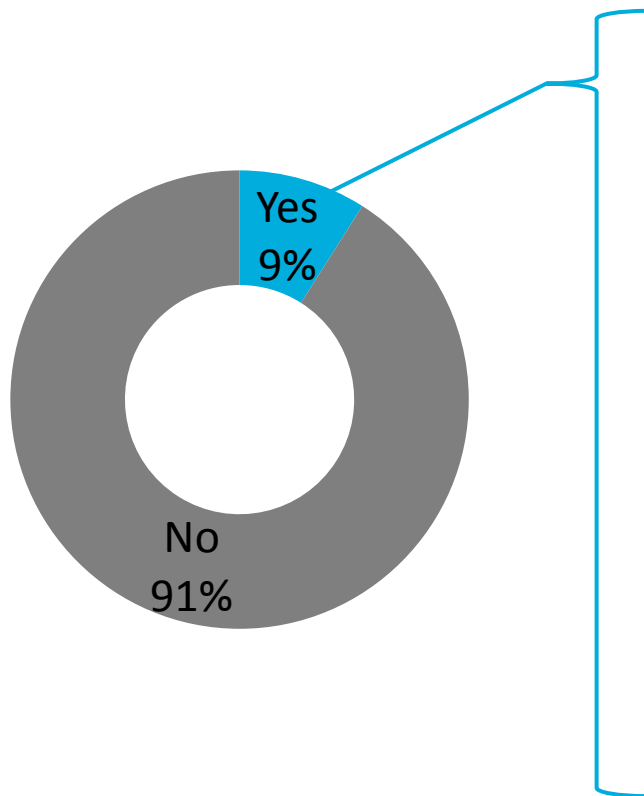


	Average	Canadians	Americans	Other
Party Size	2.06	1.97	2.32	2.15
Sample (N)	604	414	158	32

AD-HOCTOPICS

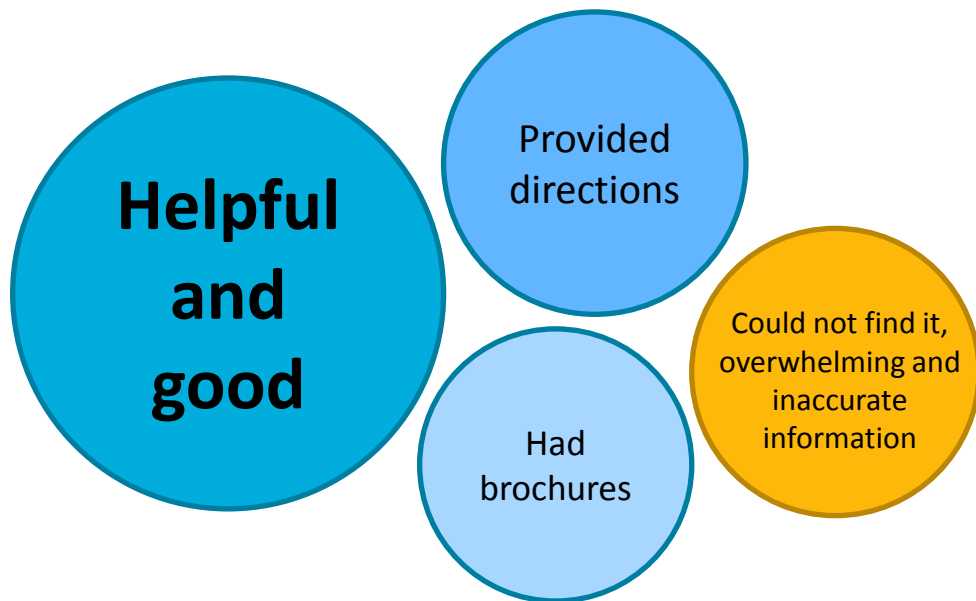
TOURISM VICTORIA'S VISITOR CENTRE

Did you visit the Tourism Victoria Visitor Centre?



N=602

Thinking of your visit to the Visitor Centre, what was helpful, and what could be improved?

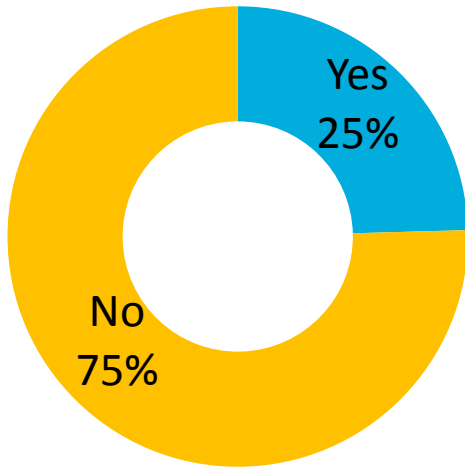


“Very helpful. Very easy to accomplish information collection.”

N=54 (includes only those that have visited the Tourism Victoria Visitor Centre)

MARKETING RECALL

Before your trip, did you see, read or hear of any marketing (ads online, TV, radio, magazines) about Victoria (the city itself, accommodations, attractions, etc.)?



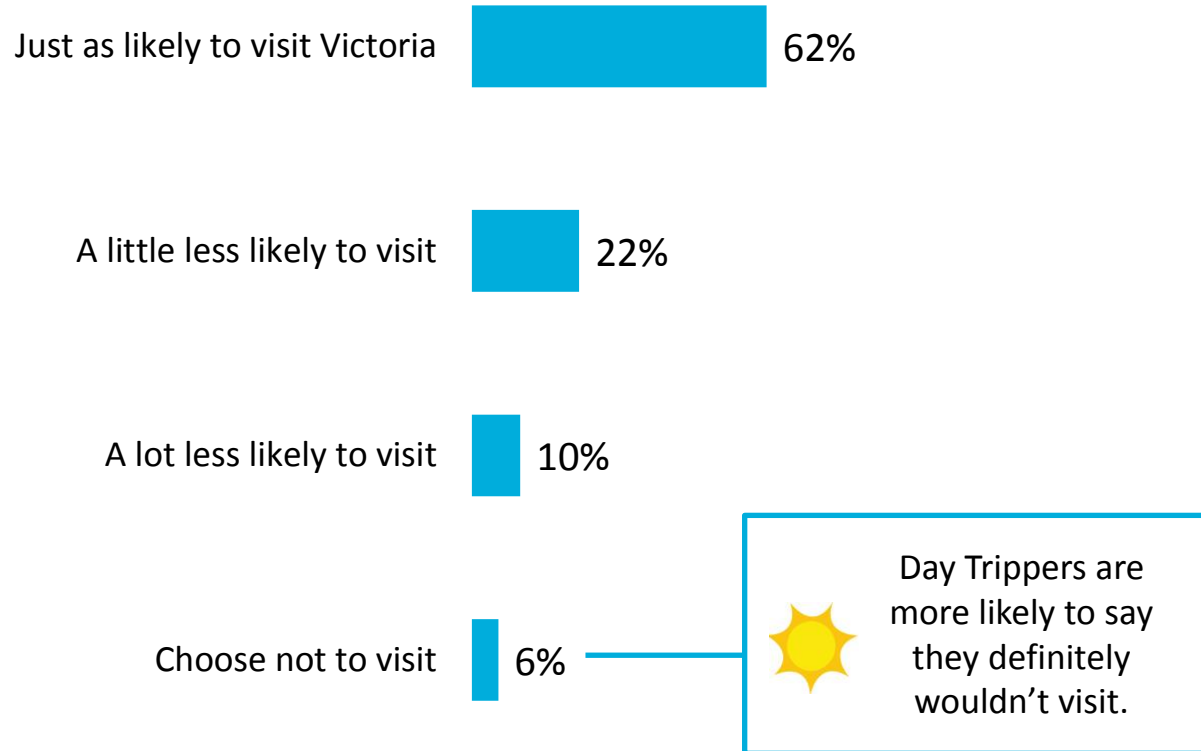
Visitors with higher marketing recall are more likely to:

- Visit paid attractions, see arts/cultural events
- Be a first time visitor
- Seek a mix of old and new experiences
- Use the Visitor Centre
- Be younger, 18 – 24
- Be from Washington State

But less likely to experience Victoria's restaurants/food & beverage establishments.

IMPACT OF WEATHER

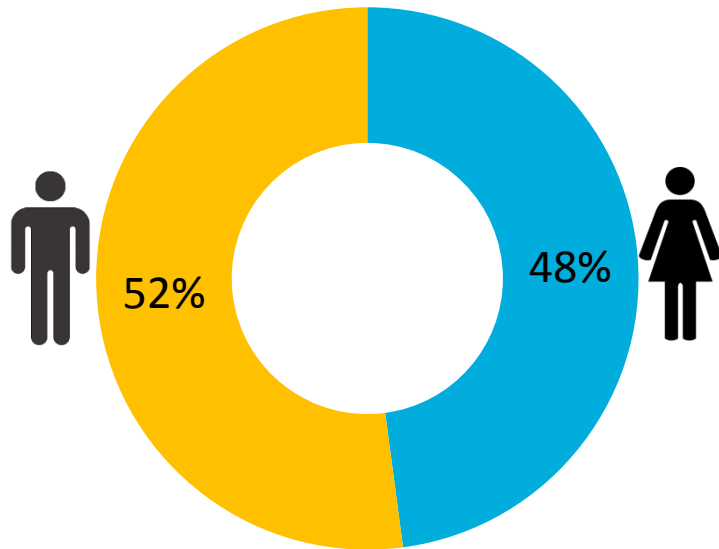
Imagine you are considering a trip to Victoria. If the weather forecast is not as your had hoped, would you be...



DEMOGRAPHICS

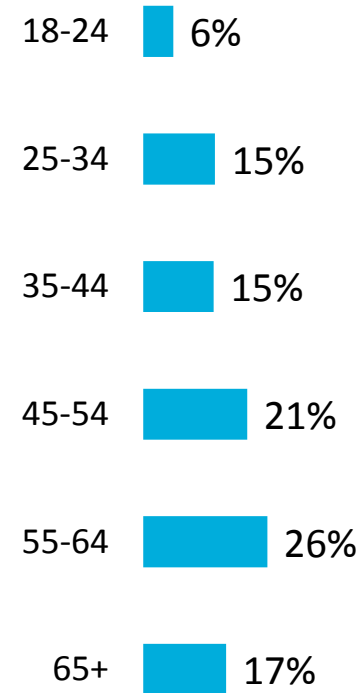
GENDER AND AGE

Are you...



N=600

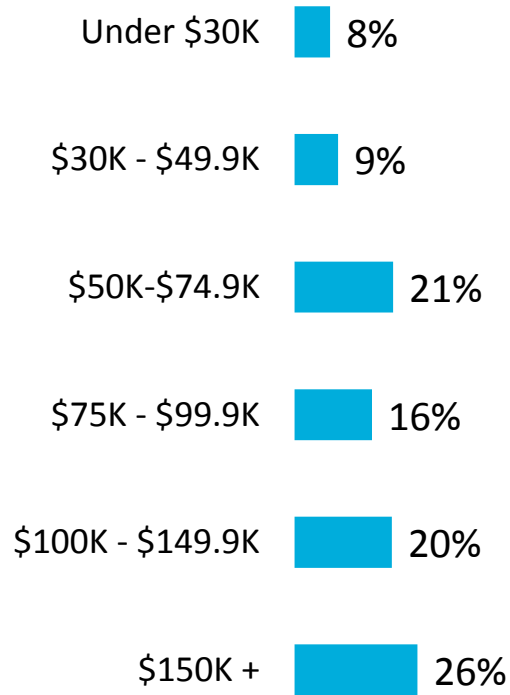
Which of the following age categories do you fit into?



N=603

HOUSEHOLD INCOME

Which of the following best represents your total household income?



APPENDIX

VISITORS VS. RESIDENTS

In addition to surveying visitors, Lux also tallied the total number of residents vs. visitors encountered. This is useful for helping project the total volume of visitors in future analysis.

In general, visitors to Victoria make up a larger proportion of travellers on weekends and on the Clipper.

	Swartz	Airport	Coho	Clipper
Visitors	40%	49%	43%	64%
Residents	60%	51%	57%	36%
<i>Sample (N)</i>	<i>916</i>	<i>368</i>	<i>300</i>	<i>119</i>

	Thursday	Friday	Saturday	Sunday
Visitors	37%	40%	48%	57%
Residents	63%	60%	52%	43%
<i>Sample (N)</i>	<i>479</i>	<i>505</i>	<i>370</i>	<i>349</i>

TOP 20 MENTIONS

Out of all the things you did in Victoria, what did you enjoy the most?

Themes	Mentions	Themes	Mentions
Restaurant, Food and Drinks	111	Outdoors	24
Walking Around the city	109	Marine Wildlife	22
Seeing friends/family	72	Downtown Victoria	21
Being near the water	64	The Weather	19
Butchart Gardens	45	Museums	18
Scenery	39	Parliament Building	15
The Fairmont Empress	30	Driving around the city	14
Shopping	29	Here for work	13
Relaxing	26	Sports/Sporting Event	13
The people	24	Architecture	12