



# TOURISM VICTORIA FALL 2013 RESEARCH WORKSHOP



TOURISM  
VICTORIA 

## Destination Brand Study

Who?

**800 past and future visitors**  
(Vancouver, Seattle, Calgary)

When?

**Aug 2013**

## Exit Survey

**600 departing visitors**

**Oct 2013**

## Member Survey

**196 members**

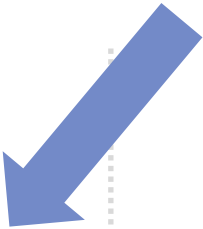
**Sep/Oct 2013**

# KEY INSIGHTS

VICTORIA'S POTENTIAL MARKET IS GROWING.

THE MARKET :  
2.74M IN 2013  
FROM 2.14M IN 2011





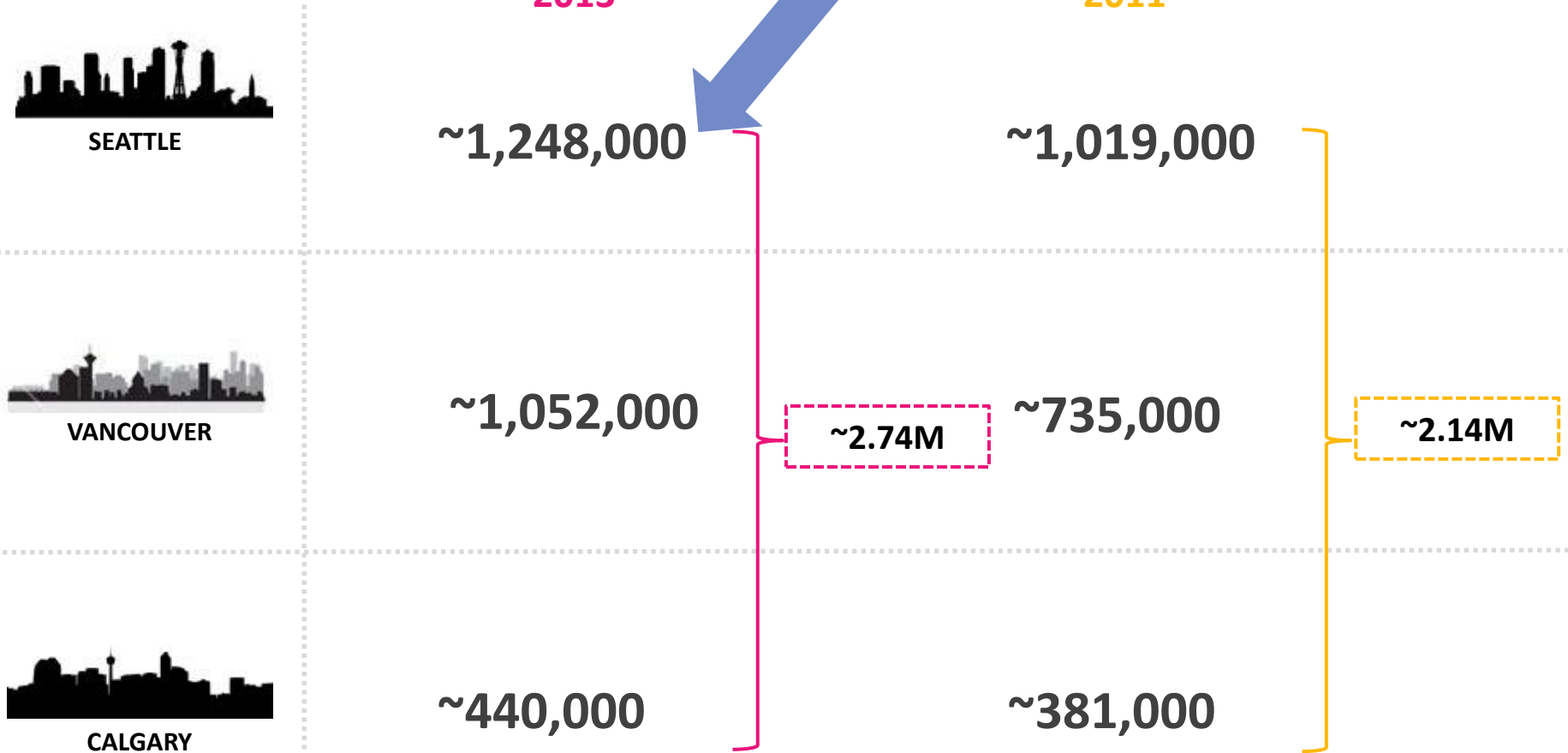
	Recent Visitors	Potential Visitors	Market
2013	~1.21M	~1.53M	~2.74M
2011	~1.35M	790K	~2.14M



KEEP TARGETING SEATTLE



# RECENT & POTENTIAL VISITORS



# SEATTLE VISITORS

2013

2011

~797K

Potential

~310K

~451K

Recent

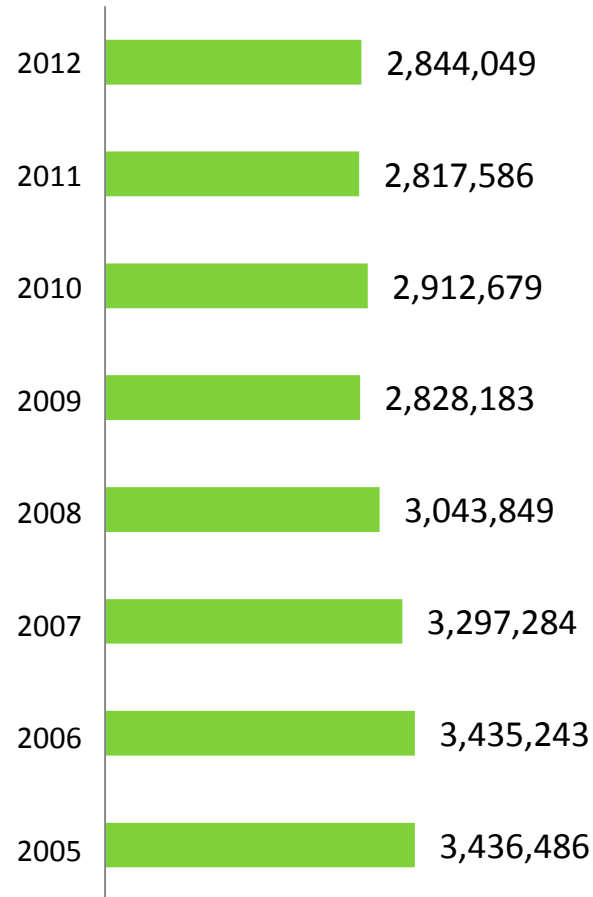
~709K



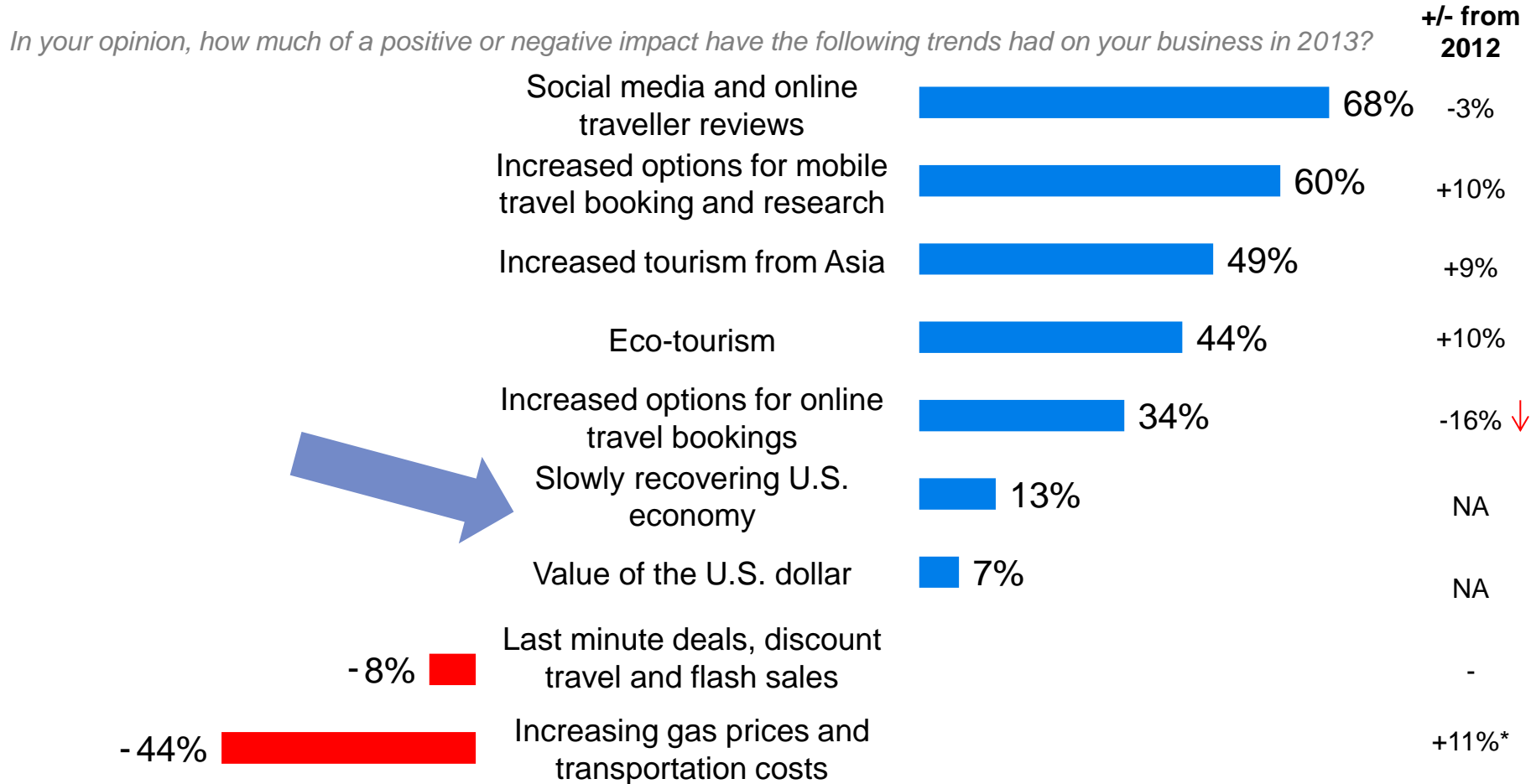
SEATTLE



# US TOURISTS ENTERING BC – STATS CAN



# IMPACT ON MEMBERS



# VANCOUVER HAS RISEN IN IMPORTANCE



# RECENT & POTENTIAL VISITORS

2013

2011



SEATTLE

~1,248,000

~1,019,000



VANCOUVER

~1,052,000

~735,000

~2.74M

~2.14M



CALGARY

~440,000

~381,000



# VANCOUVER VISITORS

2013

2011

~472K

Potential

~252K



VANCOUVER



~580K








Recent









~483K

# VISITOR COUNTRY OF ORIGIN

## OCTOBER 2013

 **74%**  
 **21%**

 **1%**  **< 1%**  
 **< 1%**  **< 1%**  **1%**  
 **< 1%**  **< 1%**

 **< 1%**  **< 1%**  **< 1%**  
 **< 1%**  **< 1%**  
 **< 1%**  **< 1%**  
 **< 1%**

Countries	%
Canada	74%
USA	21%
International	5%



# VISITOR PROVINCE/STATE OF ORIGIN OCTOBER 2013

Legend:

- 48%
- 11%
- 8%
- 8%

Map Data:

State/Province	Percentage
Washington	48%
California	11%
Nevada	3%
Idaho	1%
Montana	8%
North Dakota	8%
South Dakota	2%
Nebraska	2%
Arizona	4%
New Mexico	2%
Texas	2%
Oklahoma	2%
Missouri	2%
Illinois	2%
Indiana	2%
Michigan	2%
Ohio	2%
Pennsylvania	2%
New York	2%
Vermont	2%
New Hampshire	2%
Maine	2%
Alaska	2%
Hawaii	2%

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

- = *less than 1%*

COMPETITION IS GETTING TOUGHER,  
DIFFERENTIATION IS VITAL



# ACCORDING TO THE UNITED NATIONS WORLD TOURISM ORGANIZATION...

## 1 Billion

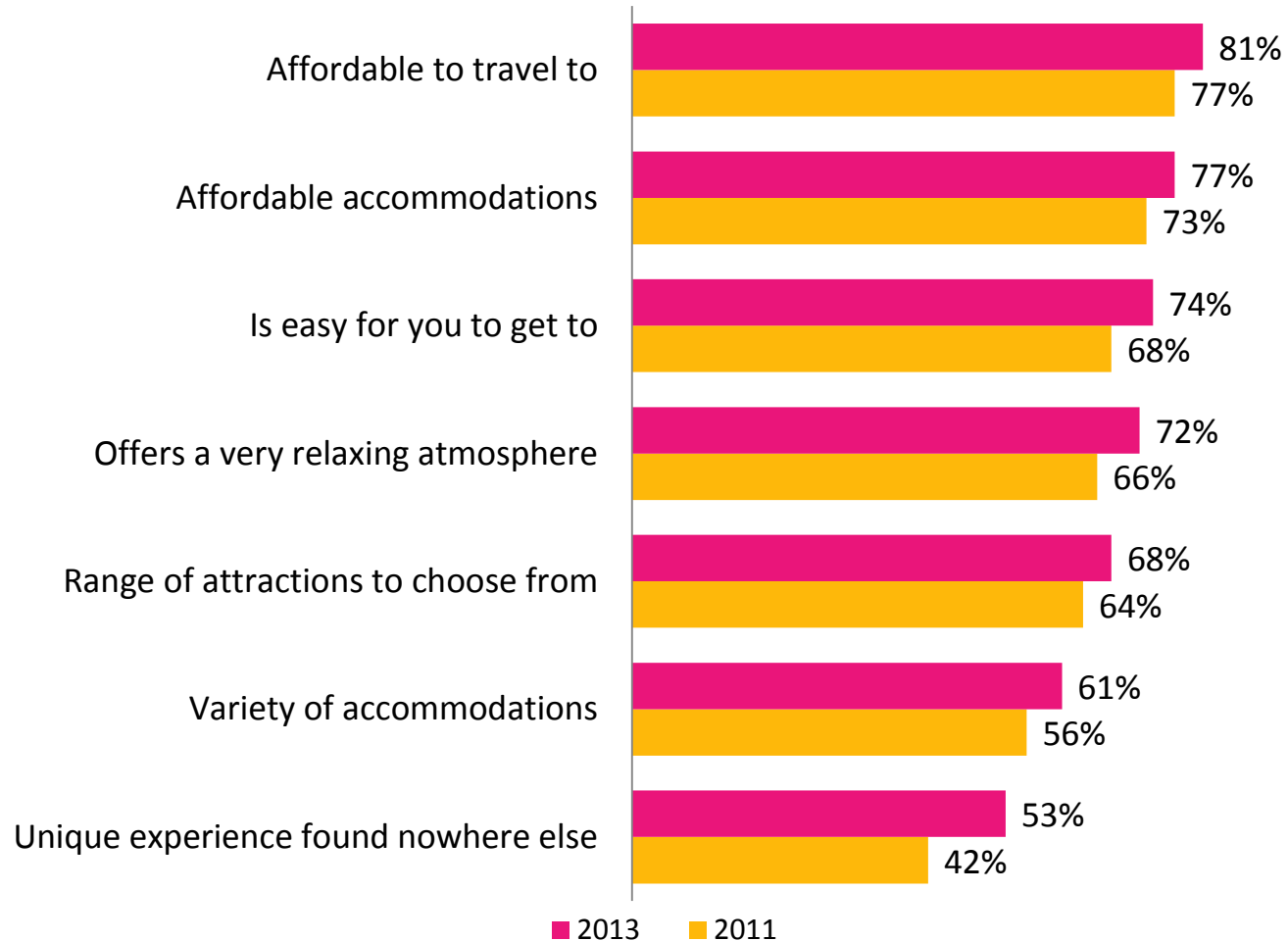
international travellers in 2012  
for first time.

## 70-85%

of world's population travelled  
within their own country each  
year.

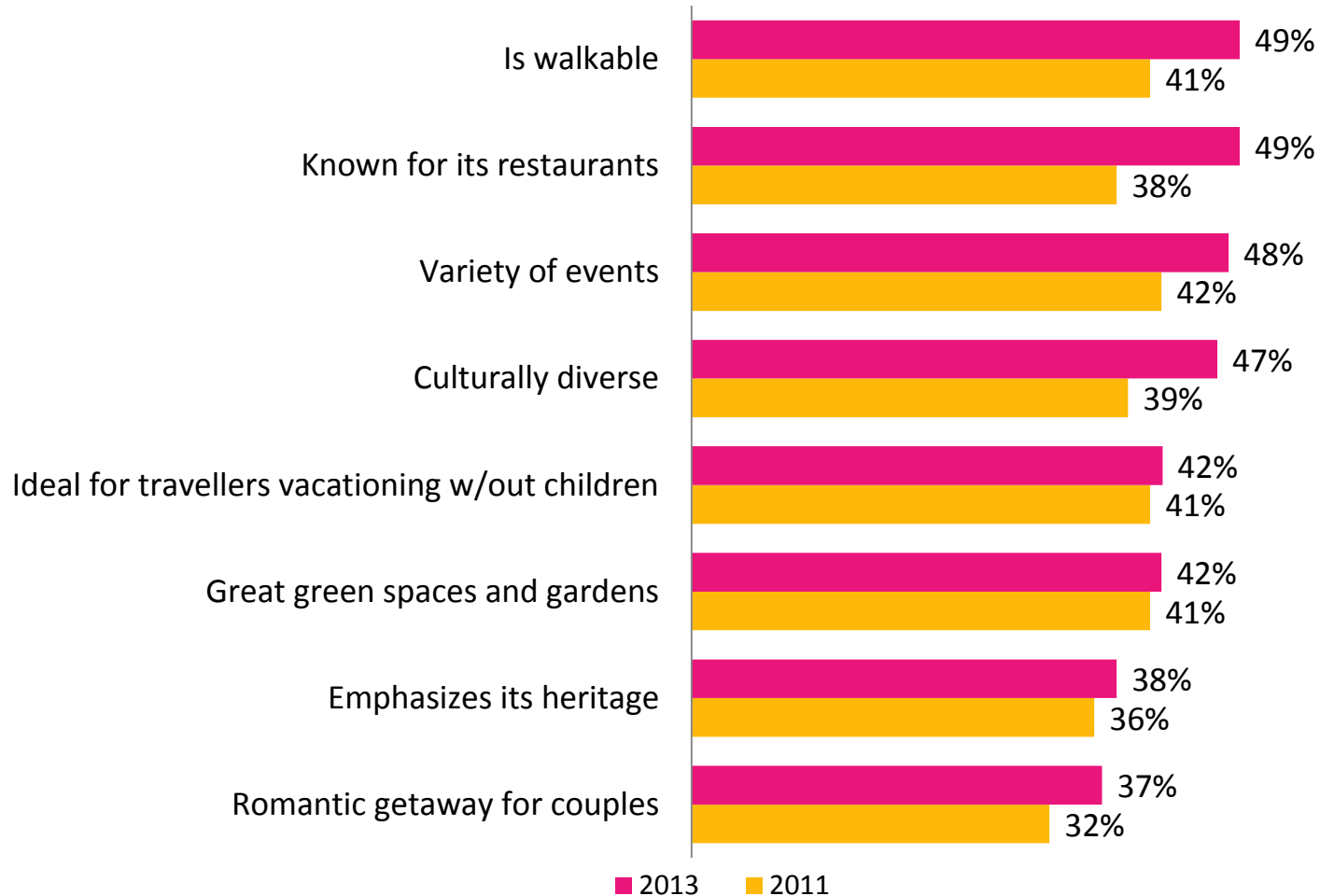
# CATEGORY IMPORTANCE – COST OF ENTRY

% Important (rated 6,7 out of 7)



# CATEGORY IMPORTANCE - SECONDARY

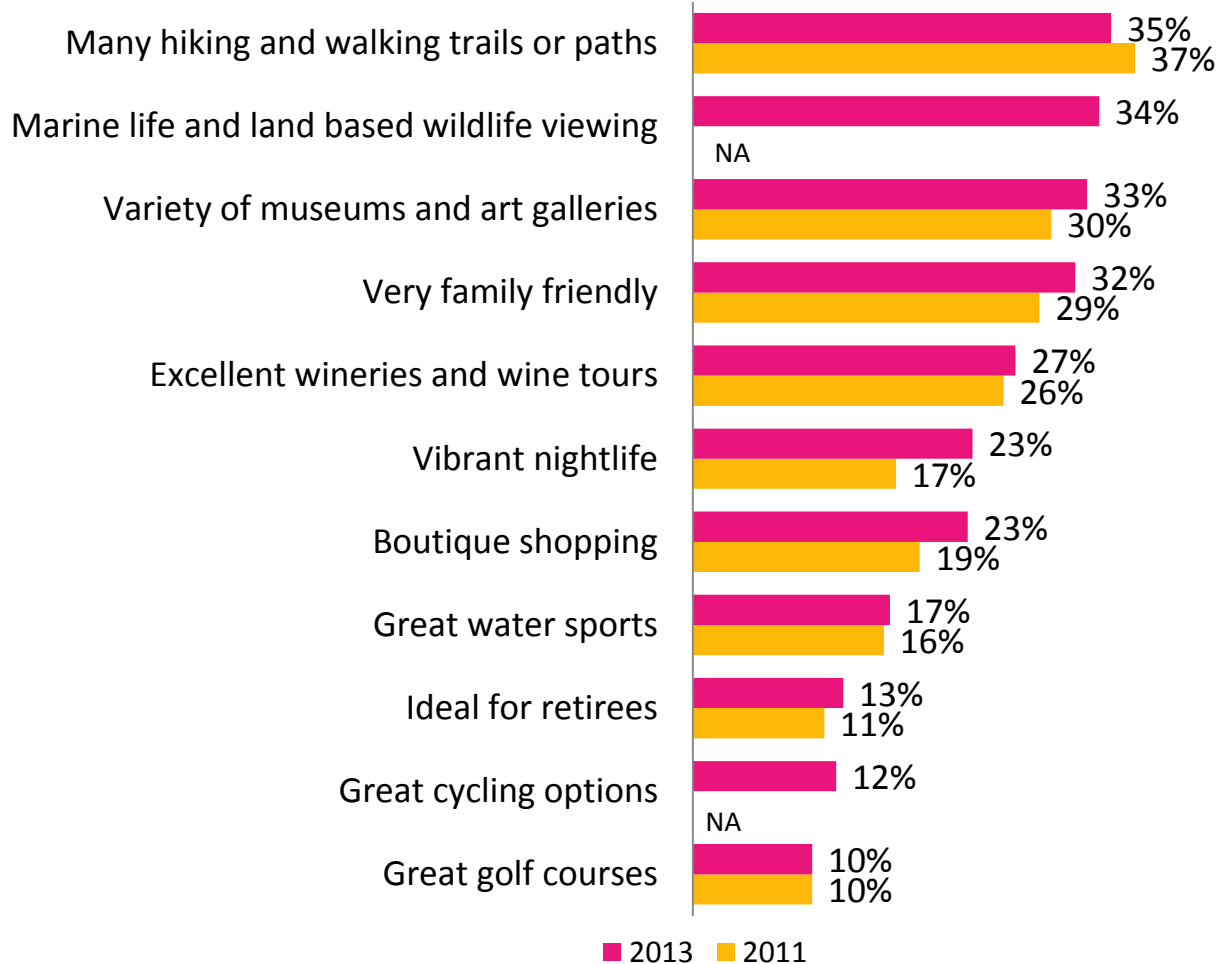
% Important (rated 6,7 out of 7)



# CATEGORY IMPORTANCE – LESS IMPORTANT

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

% Important (rated 6,7 out of 7)





# COMPETITOR STRENGTHS

## SEATTLE

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

## VANCOUVER

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

## WHISTLER

Mountain sports  
Nightlife  
Hiking trails  
Walkable

## OKANAGAN

Affordability  
Golf  
Ideal for retirees  
Watersports  
Wineries

# VICTORIA'S STRENGTHS & WEAKNESSES



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



Hiking trails  
Accessibility  
Affordability  
Restaurants  
Wineries  
Nightlife  
Mountain sports

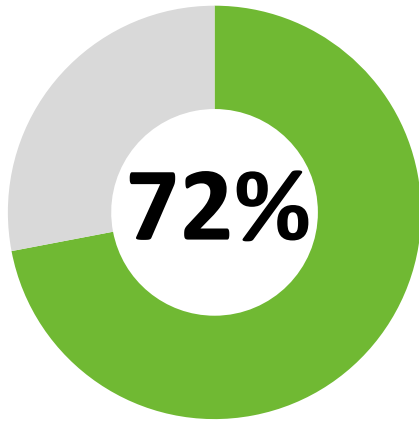


RELAXATION MUST  
BE LEVERAGED





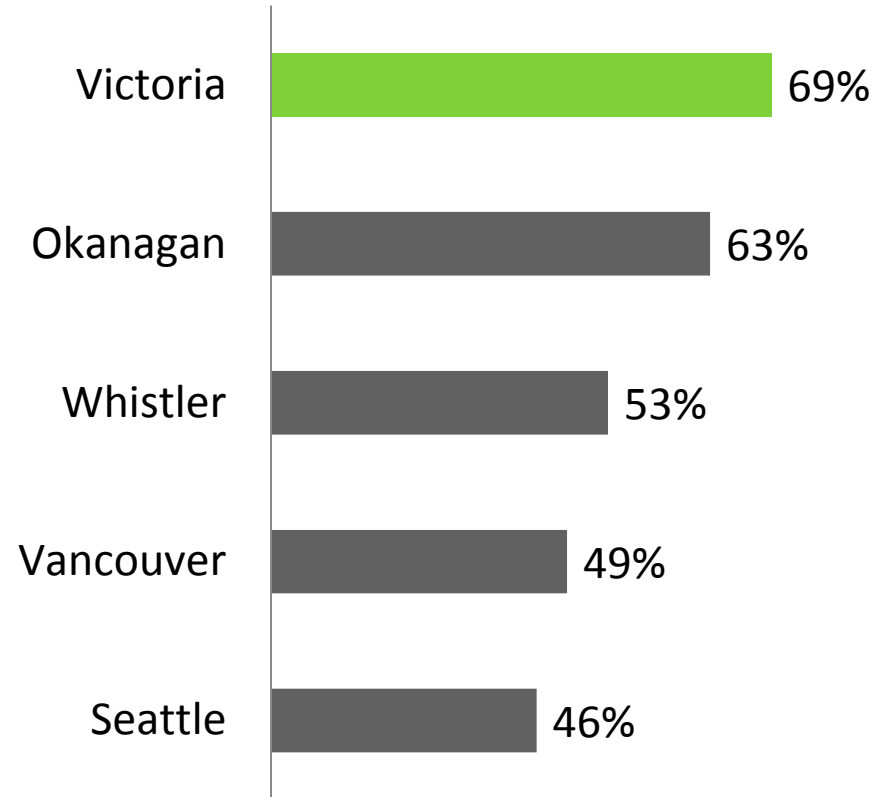
# RELAXATION / RELAXING ATMOSPHERE



Rated important

***Ranked only behind  
affordability and accessibility.***

# VICTORIA VS. COMPETITORS ON RELAXATION

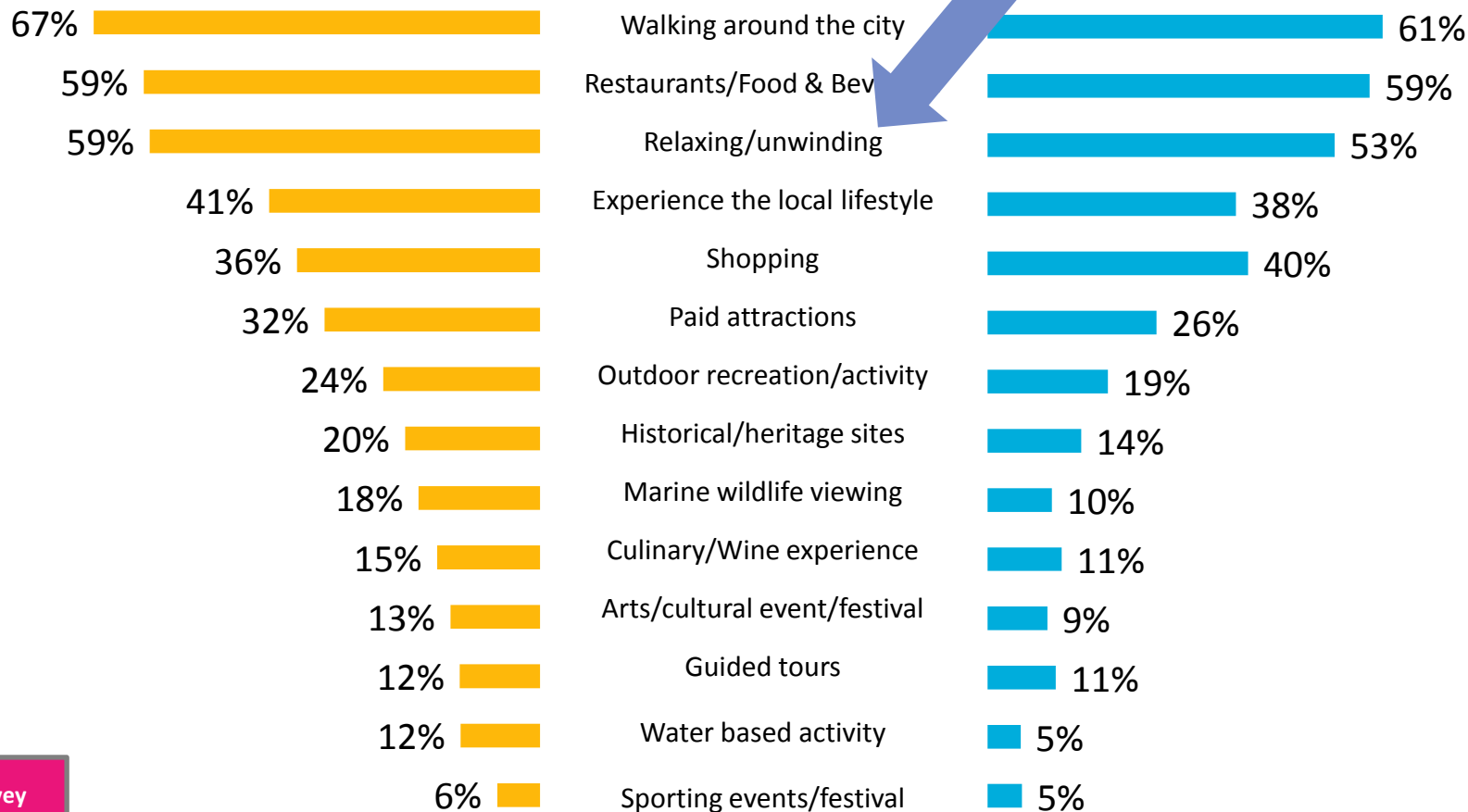


# EXPERIENCES ANTICIPATED AND ACTUALLY DONE

## OCTOBER 2013

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

*What did you actually do?*

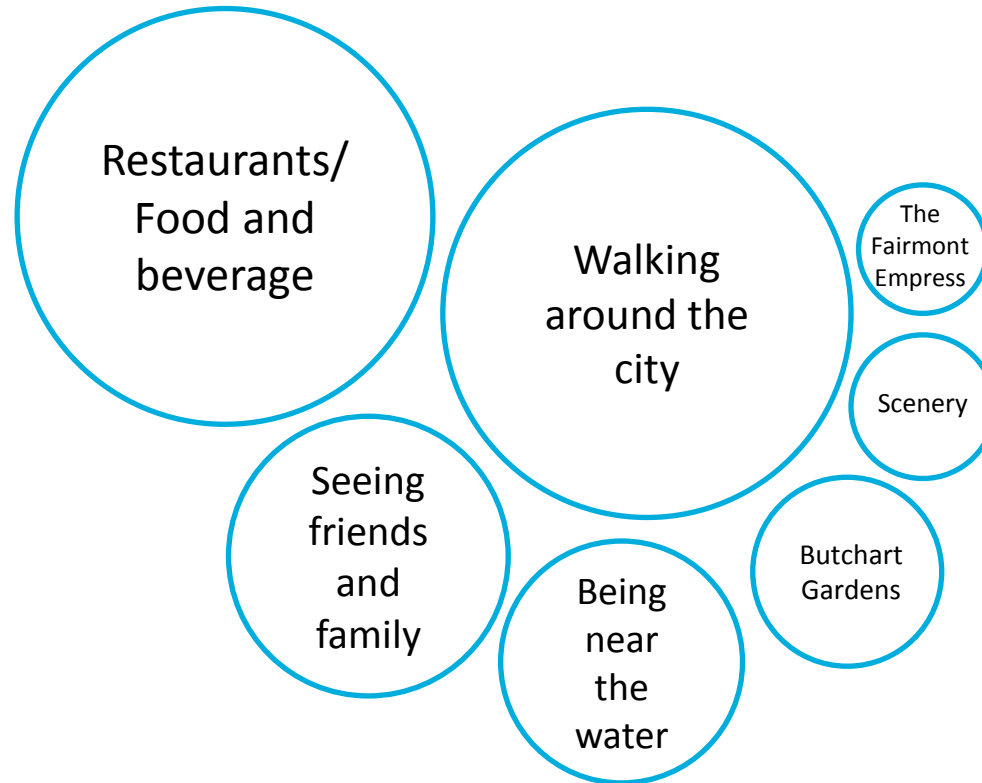




# MOST ENJOYED ACTIVITIES

## OCTOBER 2013

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



# RESTAURANTS, FOOD/BEVERAGE ARE AN OPPORTUNITY



# CULINARY TOURISM IS GROWING

49%

Rated important

+11

Since 2011

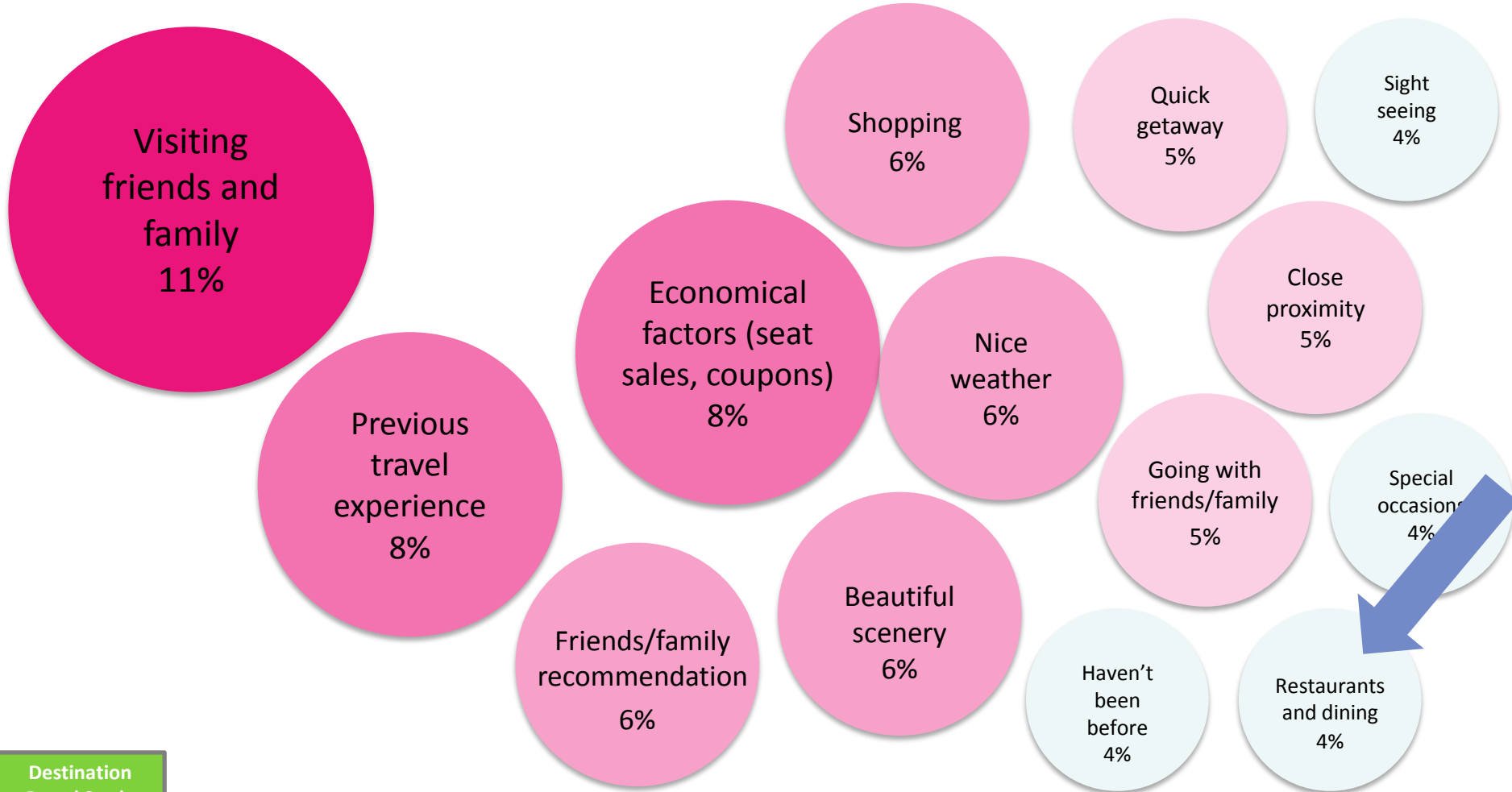
18%

Say they are a “foodie”  
and “travel to eat”

+5

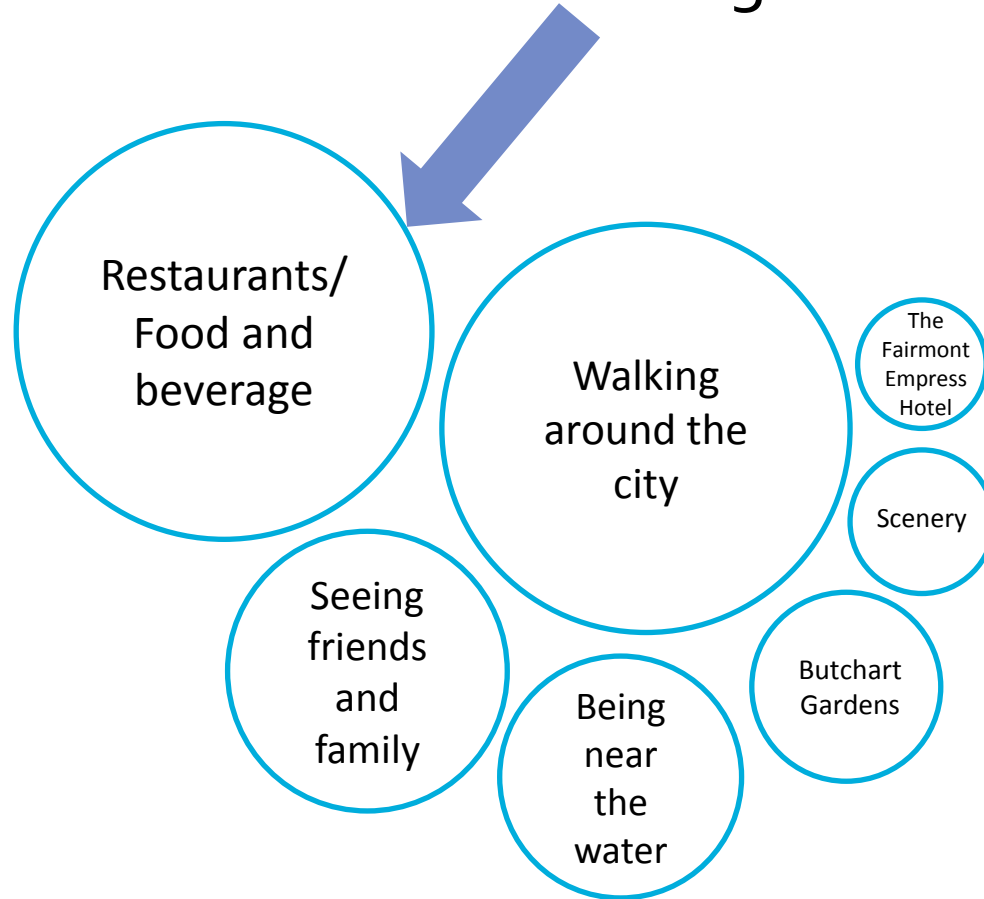
Since 2011

# VACATION INSPIRATION (UNAIDED)



# MOST ENJOYED ACTIVITIES

## OCTOBER 2013

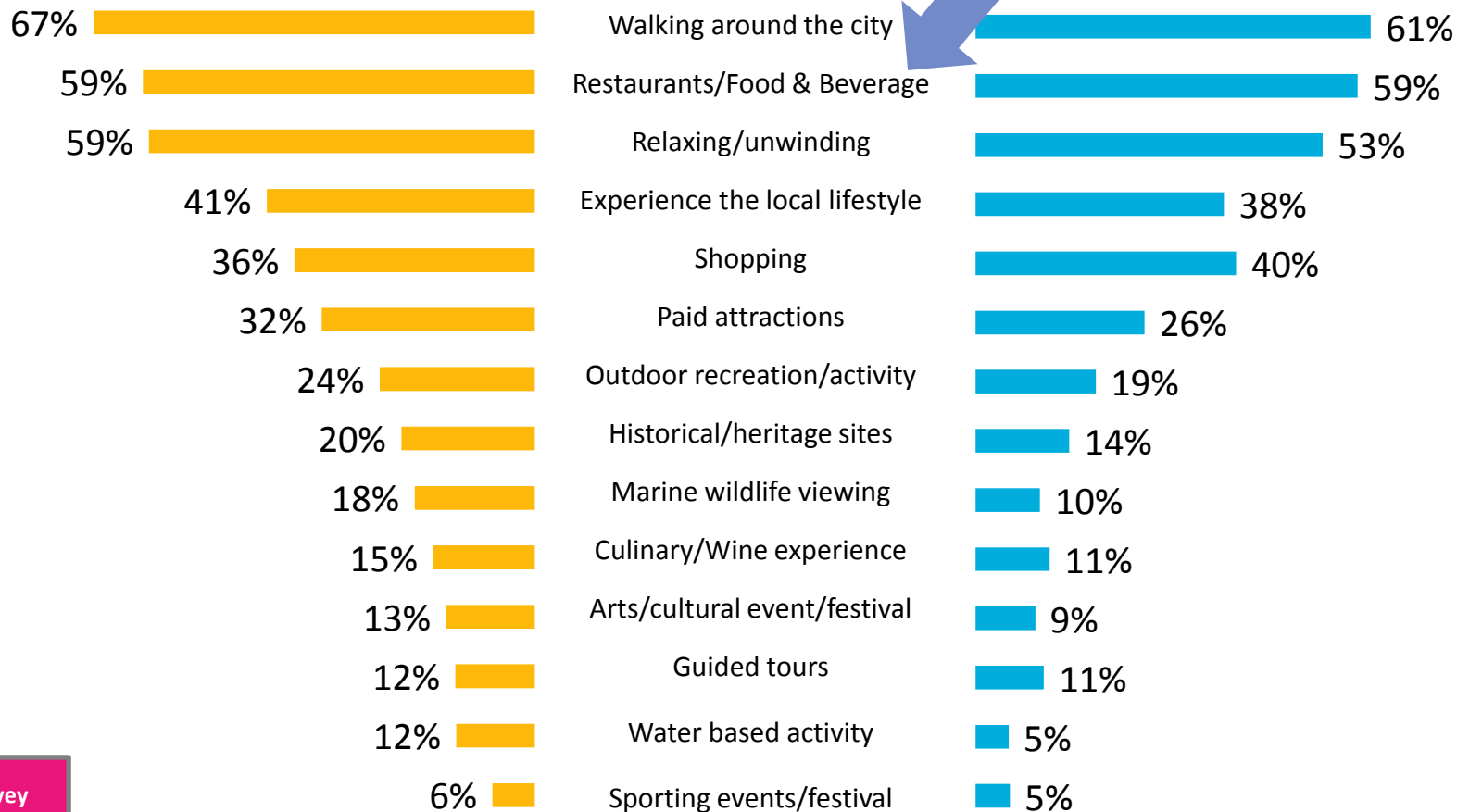


# EXPERIENCES ANTICIPATED AND ACTUALLY DONE

## OCTOBER 2013

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

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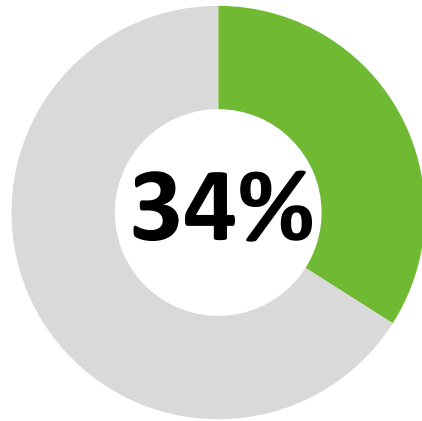




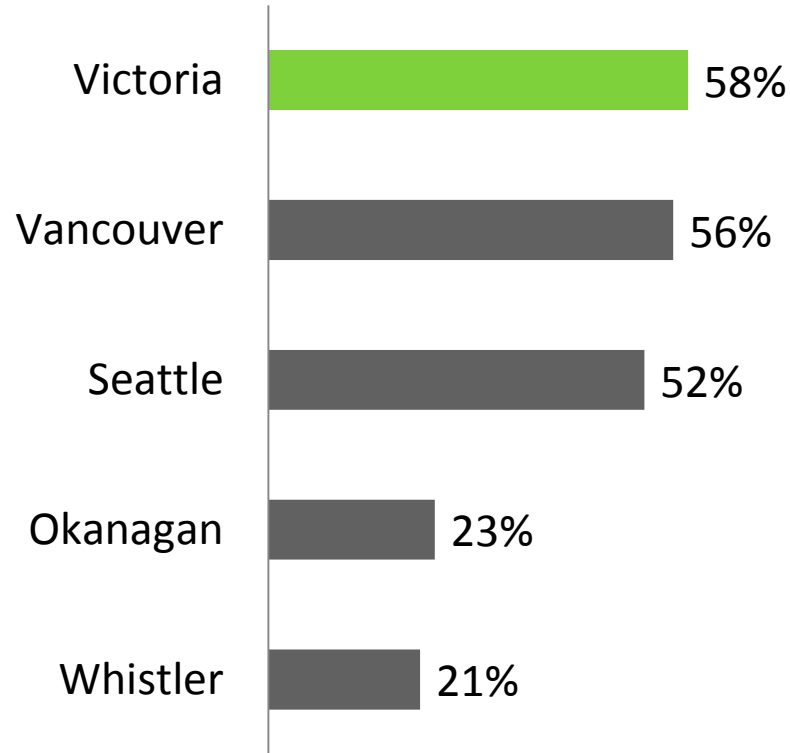
# MARINE WILDLIFE VIEWING ANOTHER POTENTIAL LEVERAGE POINT



# MARINE WILDLIFE VIEWING NOT CRITICAL, BUT A DIFFERENTIATOR



Rated important



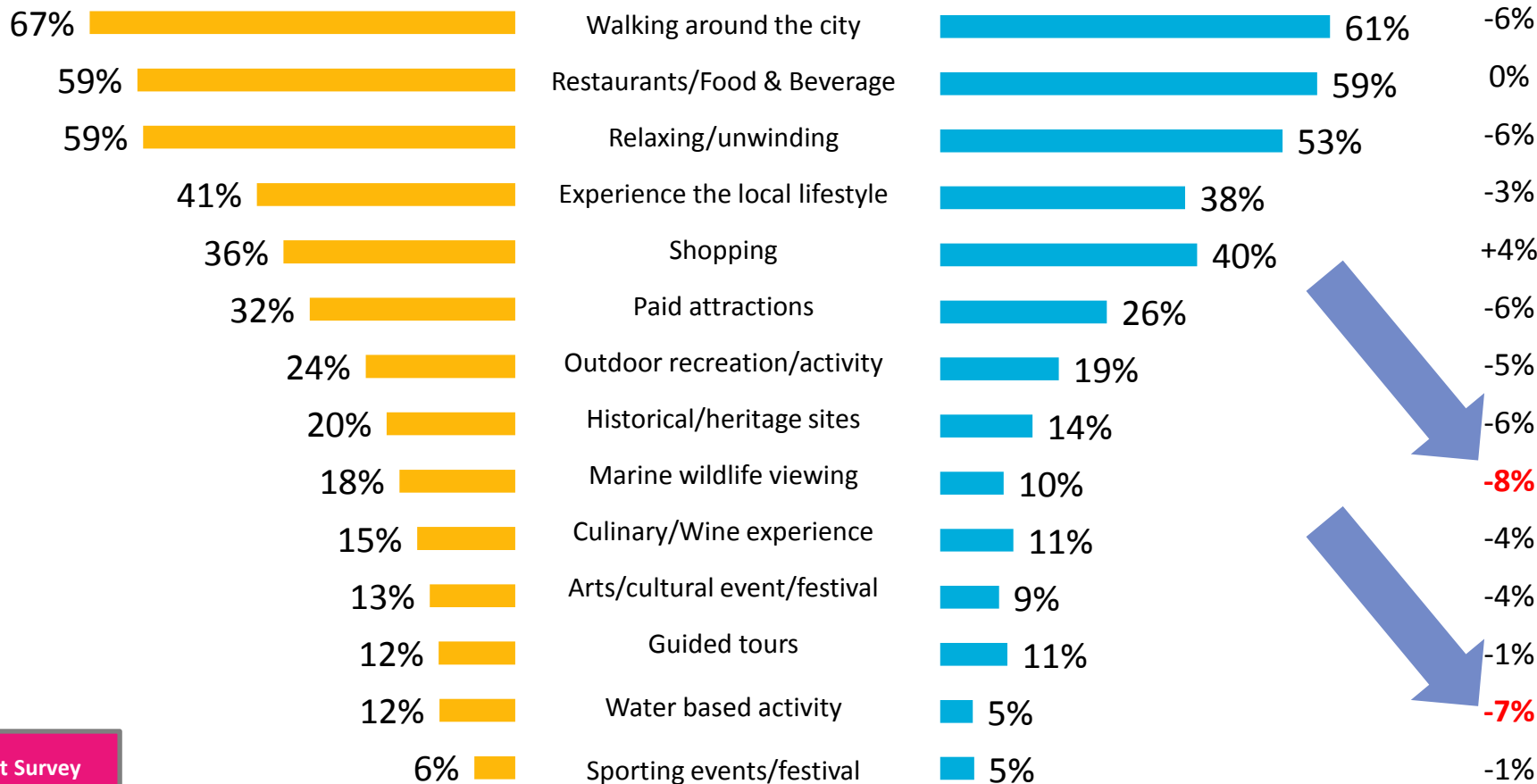
# EXPERIENCES ANTICIPATED AND ACTUALLY DONE

## OCTOBER 2013

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

*What did you actually do?*

+/- from planned and actual



AFFORDABILITY AND ACCESSIBILITY HAVE  
IMPROVED, BUT THERE IS STILL WORK TO BE DONE



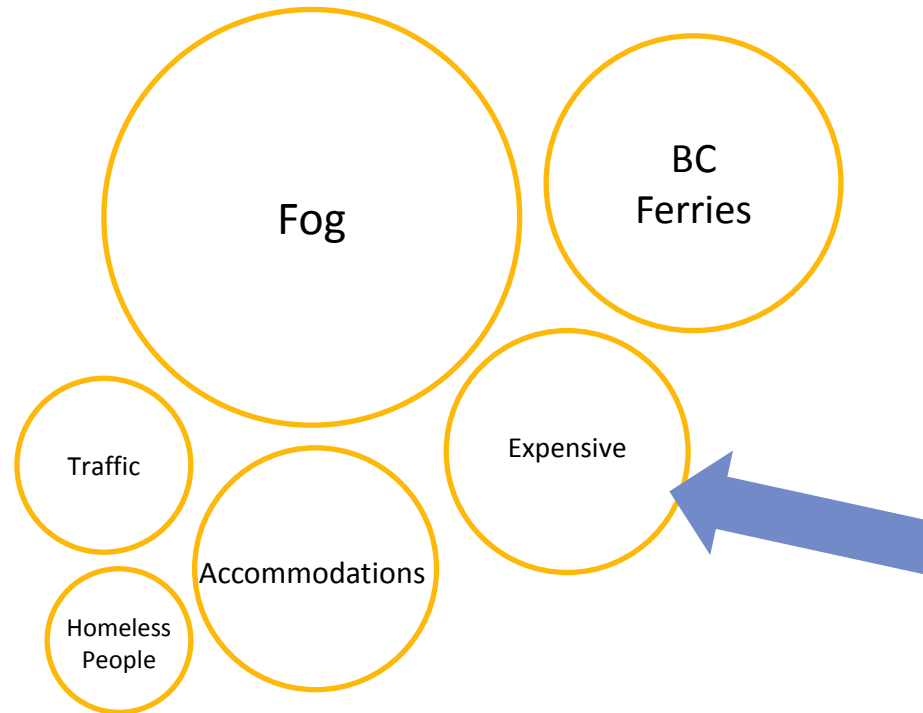
# AFFORDABILITY AND ACCESSIBILITY FOR VICTORIA

Attributes	Importance	Performance	Performance Change Since 2011	Performance Vs. Competitors
Affordable accommodations	81%	38%	+4	-2
Affordable to travel to	77%	41%	+2	-16
Easy for you to get to	74%	52%	+3	-14



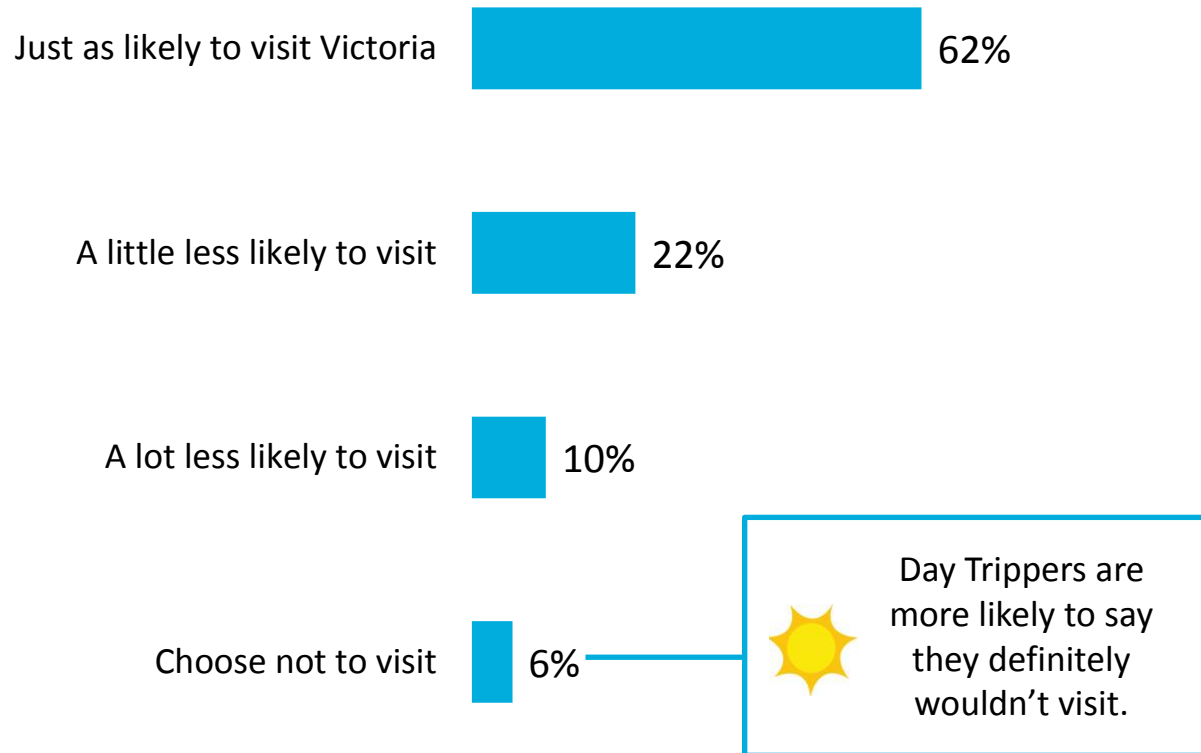
# AREAS OF DISAPPOINTMENT

## OCTOBER 2013

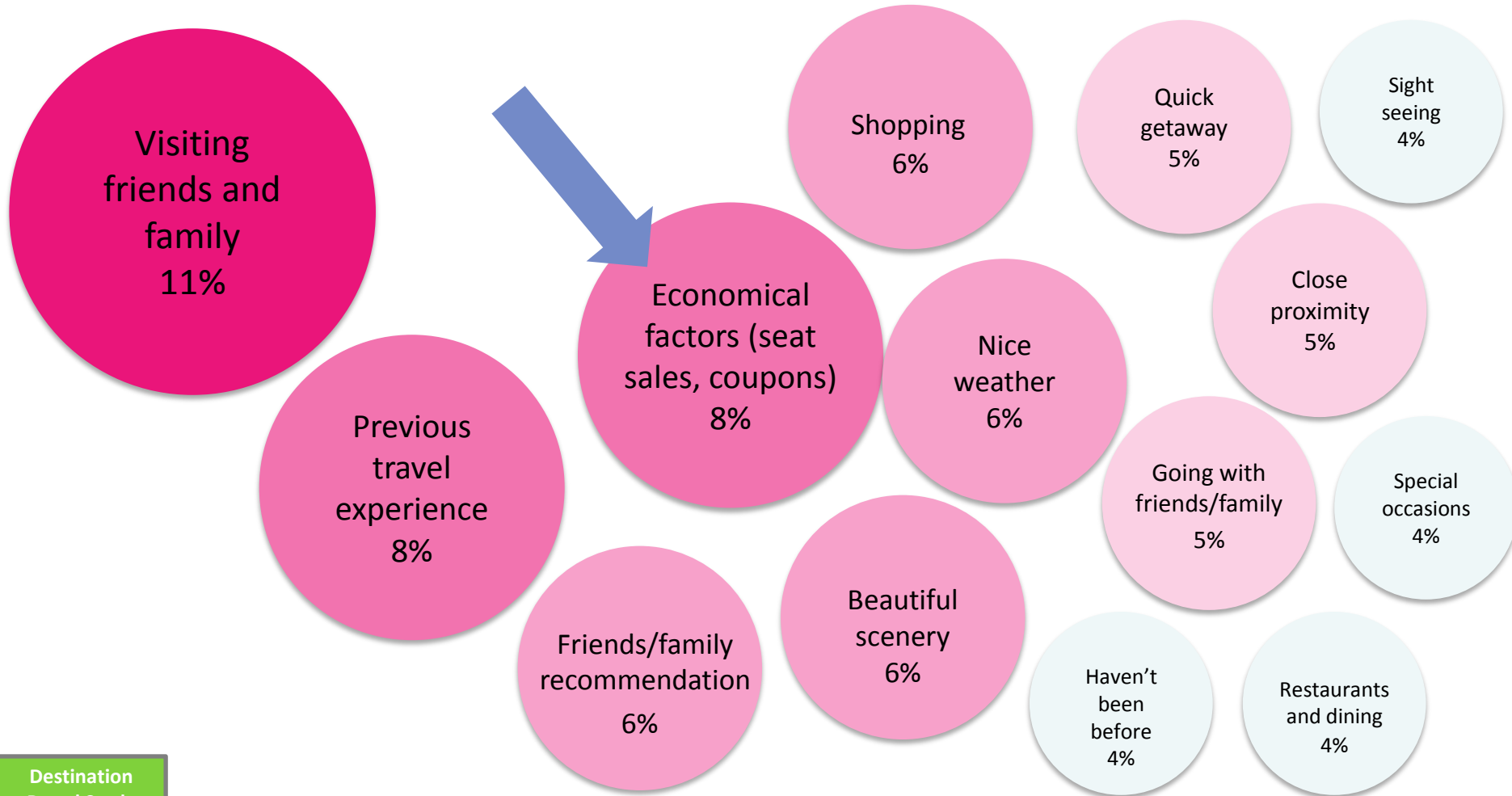


# IMPACT OF WEATHER OCTOBER 2013

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



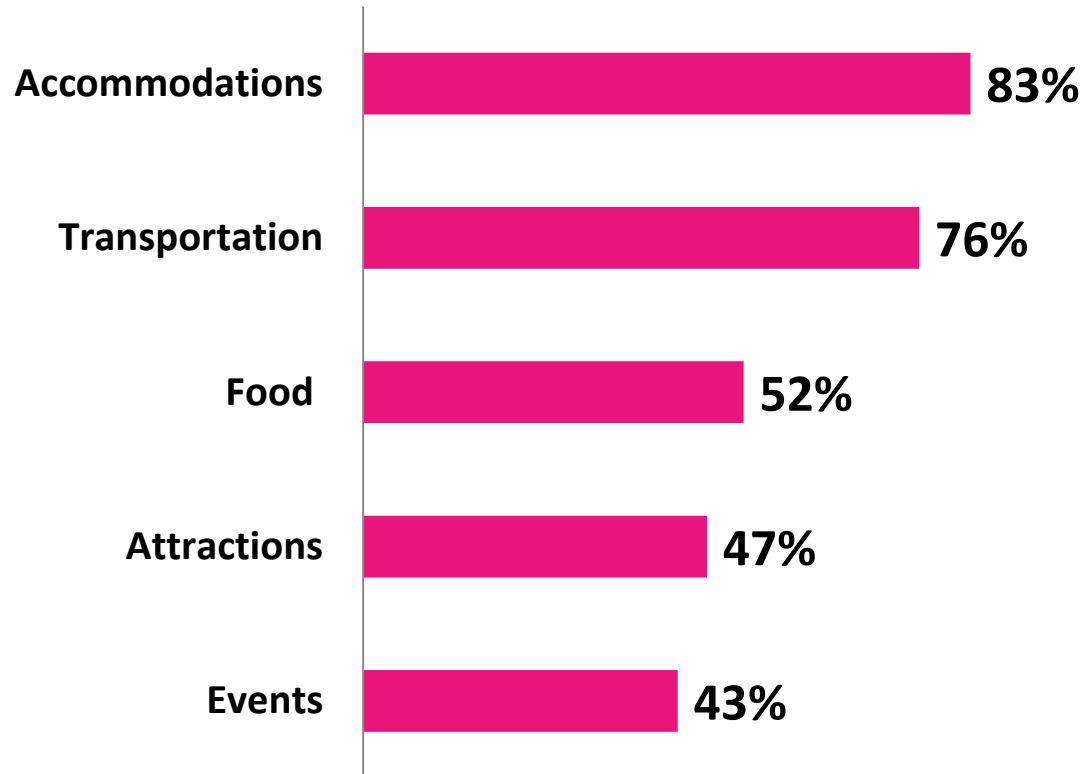
# VACATION INSPIRATION (UNAIDED)



# PRICE DISCOUNTS AND SALES

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

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



# MEMBERS THOUGH, MAY BE OVERLY CONCERNED ABOUT AFFORDABILITY AND ACCESSIBILITY

Attributes	Visitor Rating	Member Rating	Gap
Affordable accommodations	38%	26%	-12
Affordable to travel to	41%	16%	-25
Easy for you to get to	52%	16%	-36



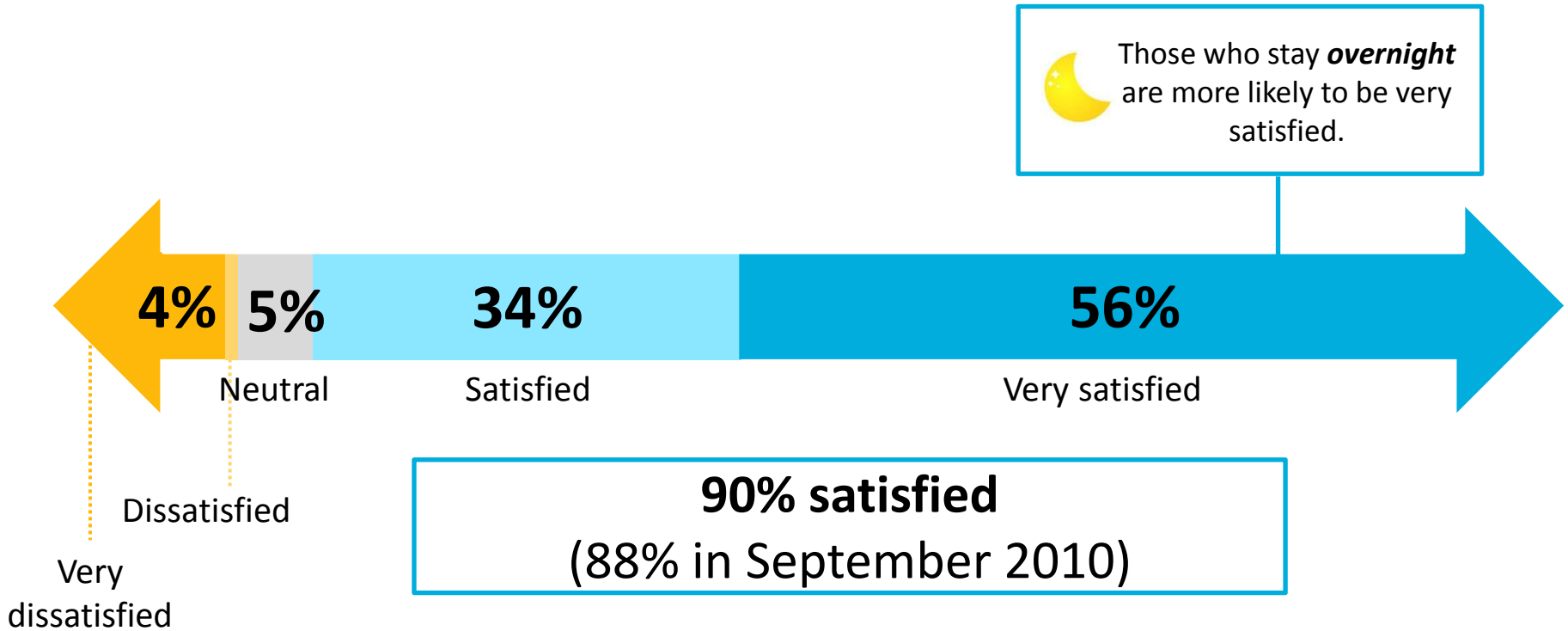
**VISITORS TO VICTORIA LEAVE SATISFIED AND WANTING  
MORE. OPPORTUNITY FOR LONGER STAYS**



# SATISFACTION WITH TRIP

## OCTOBER 2013

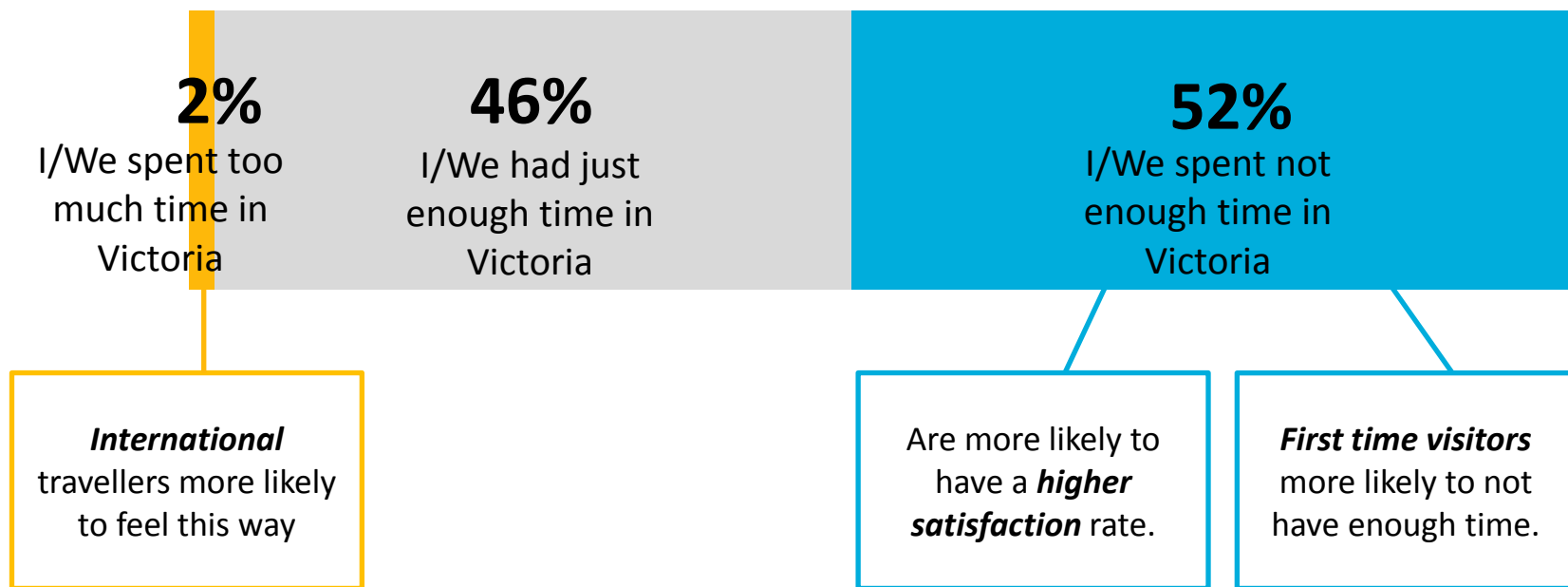
*Overall, how satisfied were you with your trip to Victoria?*



# TIME SPENT IN VICTORIA: ENOUGH/NOT ENOUGH

## OCTOBER 2013

*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

## OCTOBER 2013

	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%

# PREVIOUS VISITATION TO VICTORIA AND APPROACH FOR THIS VISIT – OCTOBER 2013

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

I wanted a mix of new experiences and things I enjoyed before



**60%**

Americans more likely to state this

I wanted to do the same things I enjoyed last time



**33%**



Canadians more likely to state this

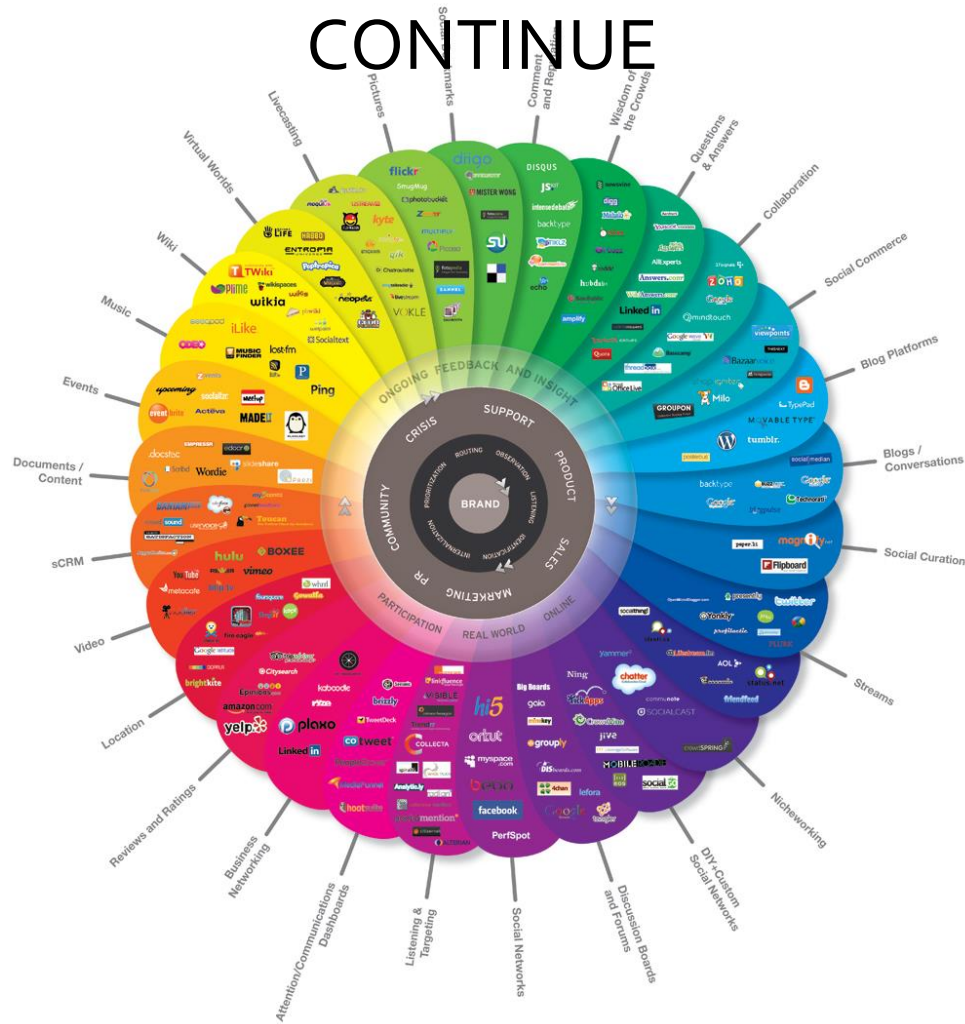
I wanted all new experiences



**8%**



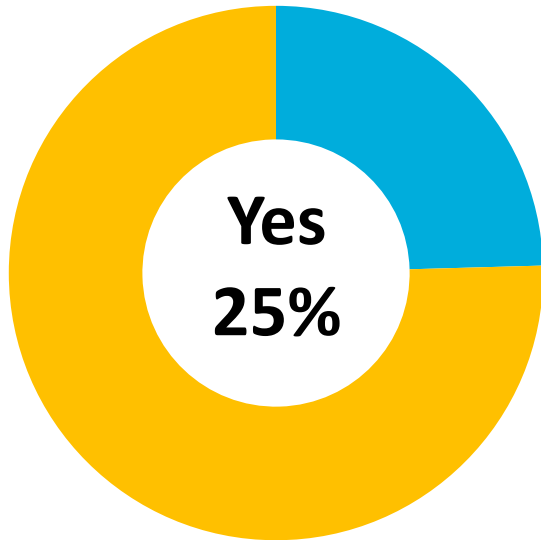
# STRONG, INTEGRATED MARKETING MUST CONTINUE



# MARKETING RECALL

## OCTOBER 2013

*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.)?*



**Recall  
marketing**

**\$785**

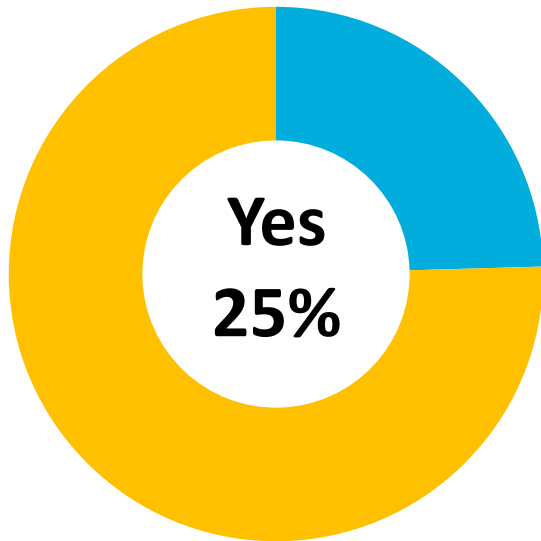
**No recall**

**\$699**

# MARKETING RECALL

## OCTOBER 2013

*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.)?*

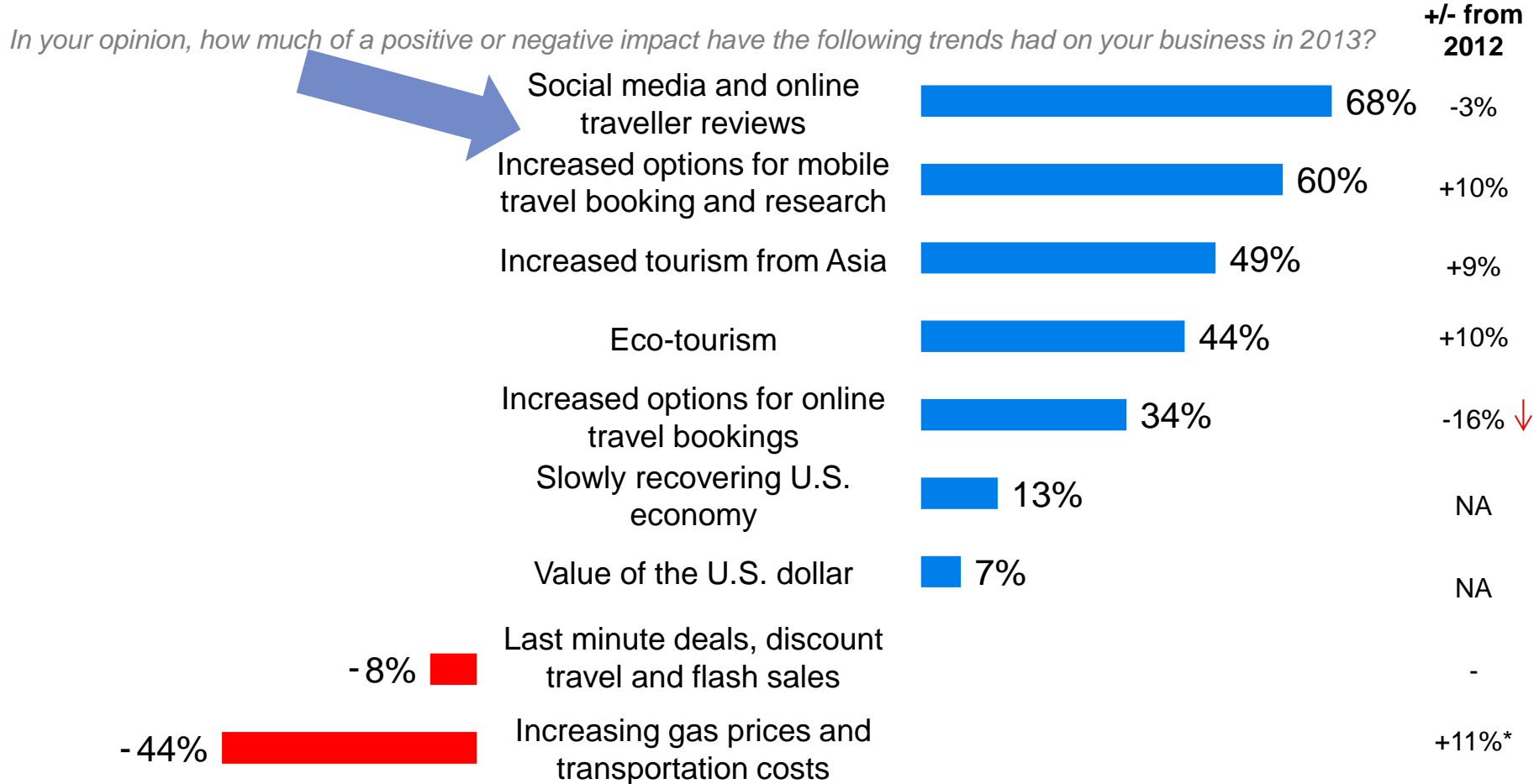


### Visitors with higher marketing recall are more likely to:

- 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

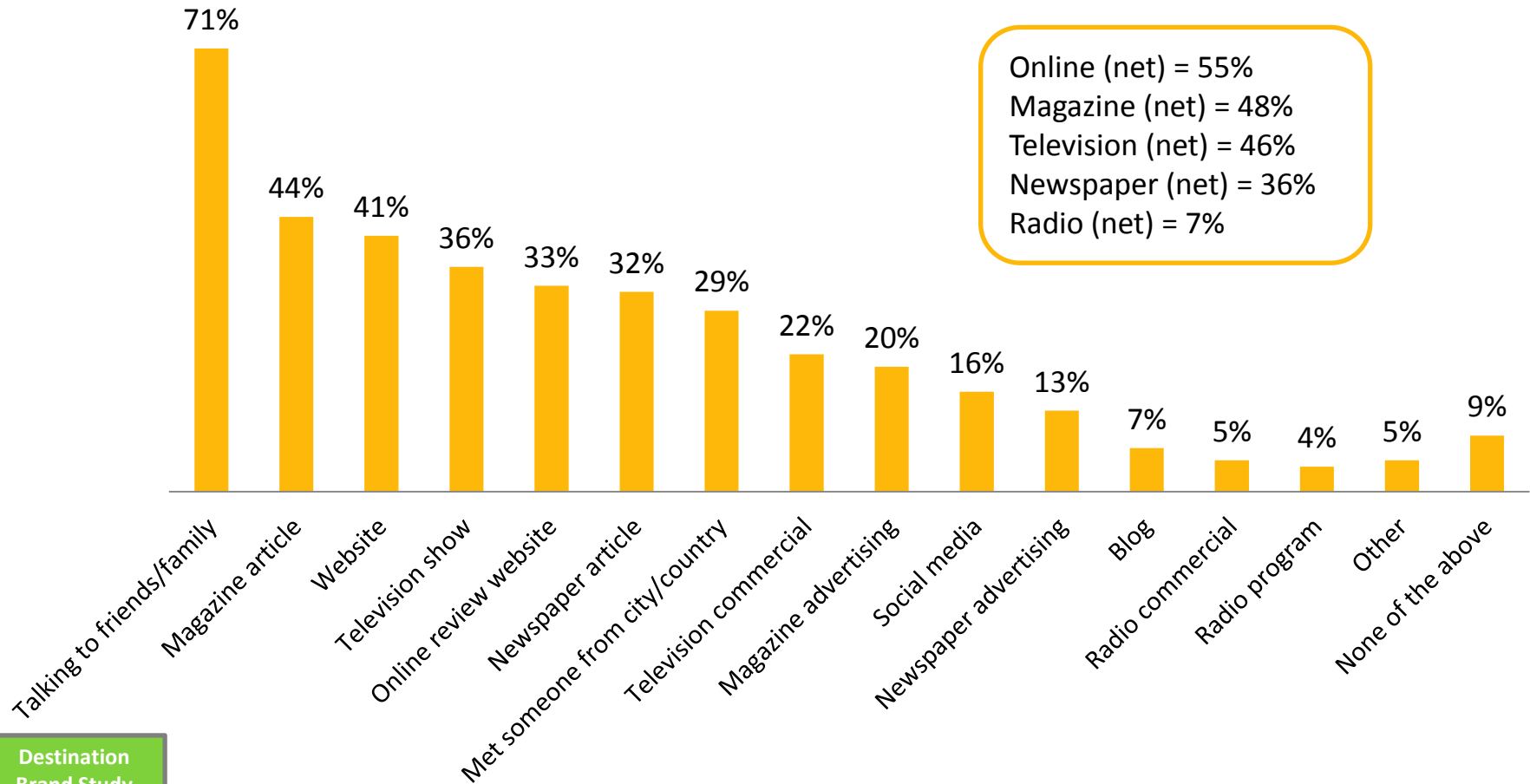
**But less likely to experience Victoria's restaurants/food & beverage establishments.**

# IMPACT ON MEMBERS



# 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?

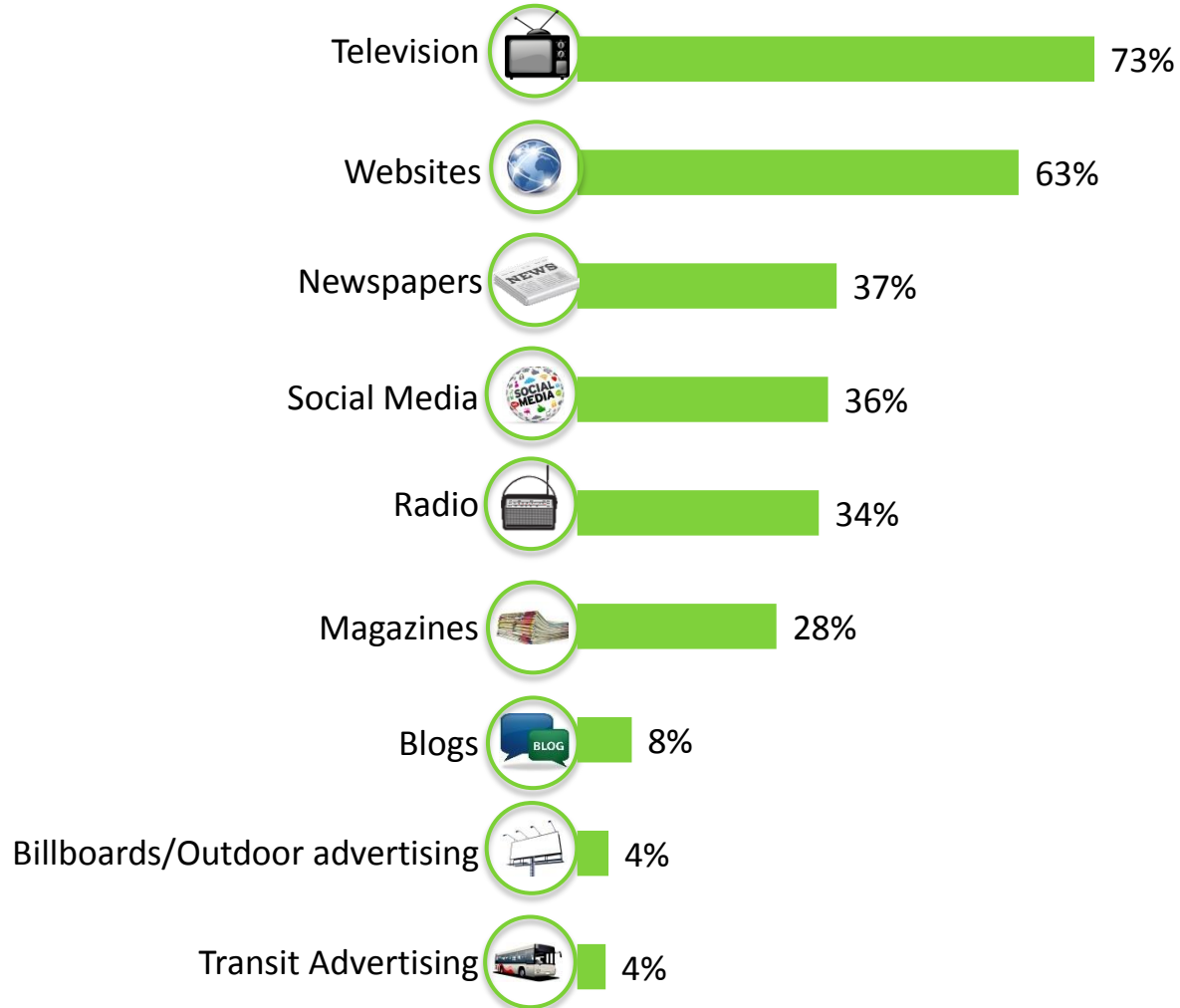


2013: N = 802



# MEDIA CONSUMPTION

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

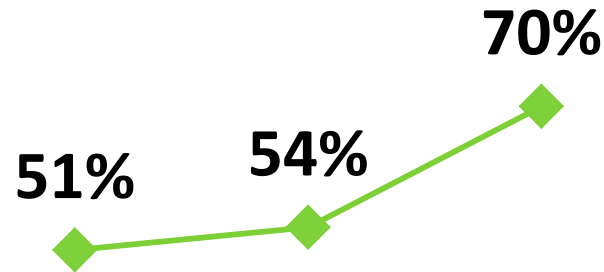


MEMBERS ARE OPTIMISTIC

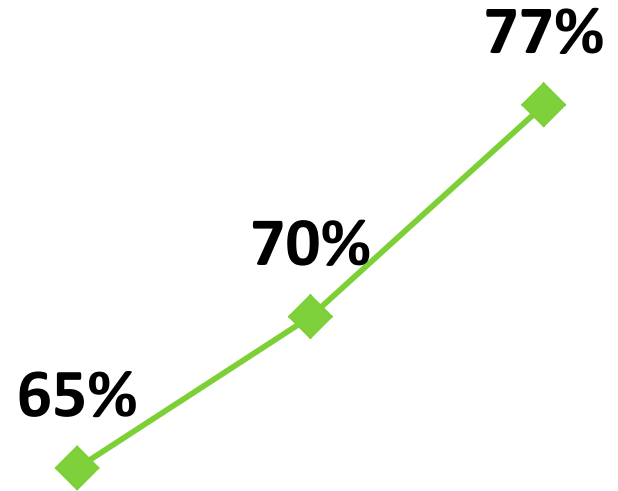


# REVENUES

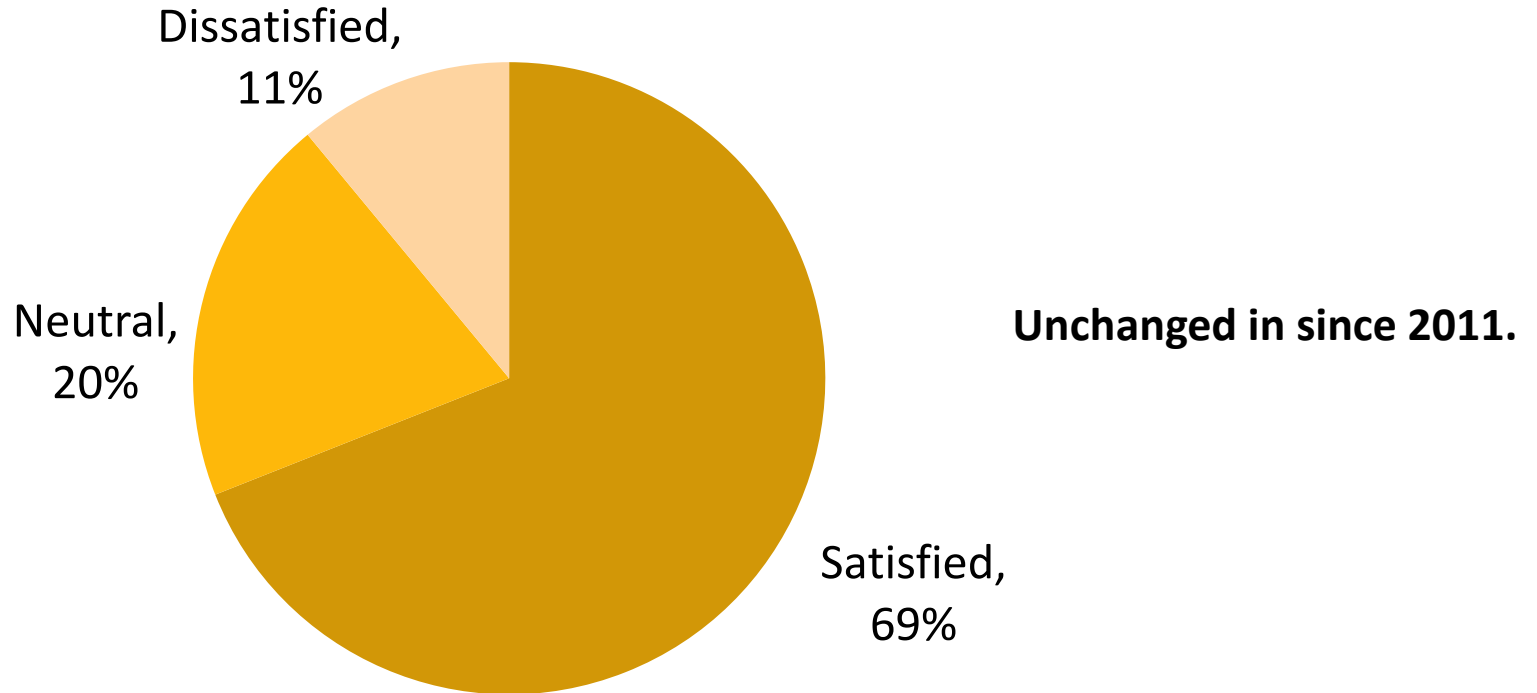
Expect Increase in Revenue  
from Previous Year



Expect Increase in Revenue  
Next Year



# MEMBER SATISFACTION



# RECAP

The market is  
growing

Seattle/WA is  
largest potential  
market

Vancouver  
growing in  
importance

Differentiation is  
essential

# RECAP

Must leverage  
relaxation

Restaurants a  
secondary  
opportunity

Marine  
wildlife/activities  
also offer potential

Must continue to  
improve on  
affordability/  
accessibility



# RECAP

Look for  
opportunities for  
extend stays, plan  
longer future stays

Strong, integrated  
marketing a must

Members are  
optimistic

# THANK YOU!

