Research Insights on Visitors to Greater Victoria

DESTINATION GREATER
VICTORIA

Overview

1. Welcome and Introductions
2. Aims for the Workshop
3. Overview of Research Tools and Resources
4. Destination Greater Victoria's 2019 Visitor Survey
5. Summary Insights about Visitors to Greater Victoria
6. Questions

Presentation and Visitor Survey Report will be provided to workshop participants.

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Research Tools and Resources

- Chemistry Consulting Victoria Tourism Bulletins
- STR Trend Reports
- Destinations International Event Impact Calculator
- Statistics Canada Overnight Visitor Surveys

Chemistry Consulting Victoria Tourism Bulletins

Report key monthly and year-to-date statistics for Victoria's tourism industry, for the current year and previous year:

- Average Occupancy – commercial accommodation
- Average Daily Room Rate (ADR) – commercial accommodation
- Revenue per Available Room (RevPAR) – commercial accommodation
- BC Ferries Traffic – Route 1 passengers, vehicles and buses
- Victoria International Airport – passenger arrivals
- Victoria Conference Centre – delegate days
- Cruise Business – number of ships, passengers and crew

Bulletins are available at:

https://chemistryconsulting.ca/newsletters/victoria-tourism-bulletins

Victoria Tourism Bulletin October 2019

TOURISM STATISTICS	October 2019	October 2018	Variance	Year to Date 2019	Year to Date 2018	Variance
Average Occupancy	73.76%	75.53%	(1.77%)	76.32%	78.37%	(2.05%)
Average Daily Room Rate	$168.53	$161.00	$7.53	$195.57	$190.29	$5.28
Revenue Per Available Room **(RevPAR)**	$124.30	$121.60	$2.70	$149.27	$149.14	$0.13
BC Ferries (Tsawwassen - Swartz Bay)						
Vehicles	159,432	160,623	(0.74%)	1,745,914	1,735,214	0.62%
Passengers	491,140	506,603	(3.05%)	5,507,516	5,565,550	(1.04%)
Buses	2,077	2,493	(16.69%)	18,111	21,175	(14.47%)
Victoria International Airport	159,369	174,227	(8.53%)	1,627,040	1,732,495	(6.09%)
Victoria Conference Centre **(Delegate Days)**	36,975	29,822	23.99%	108,248	109,342	(1.00%)
Victoria Cruise Ships						
Ships	8	7		256	258	(0.78%)
Passengers	21,519	13,386		709,042	698,297	1.54%
Crew	9,948	7,390		294,956	289,231	1.98%

Victoria Tourism Bulletin October 2019

OCCUPANCY RATE %					
Lodging Type	Number of Rooms	October 2019	October 2018	YTD 2019	YTD 2018
Number of Rooms					
Greater than 150	2,114	72.81%	75.60%	73.39%	76.75%
100 - 150	797	77.57%	77.35%	80.21%	80.41%
50 - 99	1,167	72.71%	73.99%	77.26%	79.07%
Less than 50	335	74.29%	76.34%	82.70%	81.60%
Location	4,413				
Downtown/Inner Harbour	3,103	75.48%	77.09%	77.31%	79.57%
Suburban	884	69.51%	70.37%	72.25%	74.45%
Saanich Peninsula/Sidney	426	70.00%	74.74%	77.33%	77.45%
Tier	4,413				
Upper	1,913	75.49%	78.63%	74.63%	78.09%
Mid	1,418	75.04%	75.93%	79.41%	80.90%
Lower	1,082	69.00%	69.42%	75.09%	75.44%
Lodging Type	4,413				
Hotels	3,933	74.83%	77.18%	76.66%	79.04%
Motels	480	64.97%	60.57%	73.11%	72.38%
Total Rooms	**4,413**				
Average Occupancy		73.76%	75.53%	76.32%	78.37%

Victoria Tourism Bulletin October 2019

ROOM RATE					
Lodging Type	Number of Rooms	October 2019	October 2018	YTD 2019	YTD 2018
Number of Rooms					
Greater than 150	2,114	$191.67	$184.29	$223.89	$219.14
100 - 150	797	$139.59	$125.74	$159.04	$154.22
50 - 99	1,167	$154.42	$146.05	$177.18	$169.59
Less than 50	335	$145.62	$153.09	$182.60	$175.04
Location					
Downtown/Inner Harbour	3,103	$176.87	$169.57	$206.42	$201.90
Suburban	884	$149.40	$143.76	$172.75	$167.03
Saanich Peninsula/Sidney	426	$142.16	$130.58	$156.57	$147.87
Tier					
Upper	1,913	$209.90	$200.21	$245.86	$239.75
Mid	1,418	$148.76	$143.81	$175.74	$170.14
Lower	1,082	$116.42	$106.96	$133.04	$127.40
Lodging Type					
Hotels	3,933	$174.00	$166.33	$201.67	$197.22
Motels	480	$116.85	$99.57	$134.06	$121.76
Total Rooms	4,413				
Average Room Rate		$168.53	$161.00	$195.57	$190.29

Victoria Tourism Bulletin October 2019

REVENUE PER AVAILABLE ROOM (REVPAR)					
Lodging Type	Number of Rooms	October 2019	October 2018	YTD 2019	YTD 2018
Number of Rooms					
Greater than 150	2,114	$139.55	$139.32	$164.32	$168.18
100 - 150	797	$108.28	$97.26	$127.57	$124.01
50 - 99	1,167	$112.27	$108.06	$136.89	$134.09
Less than 50	335	$108.19	$116.87	$151.00	$142.83
Location					
Downtown/Inner Harbour	3,103	$133.50	$130.71	$159.58	$160.66
Suburban	884	$103.85	$101.16	$124.81	$124.35
Saanich Peninsula/Sidney	426	$99.51	$97.60	$121.07	$114.53
Tier					
Upper	1,913	$158.46	$157.42	$183.49	$187.21
Mid	1,418	$111.63	$109.19	$139.56	$137.64
Lower	1,082	$80.32	$74.25	$99.90	$96.12
Lodging Type					
Hotels	3,933	$130.20	$128.37	$154.60	$155.88
Motels	480	$75.91	$60.31	$98.00	$88.14
Total Rooms	4,413				
Average REVPAR		$124.30	$121.60	$149.27	$149.14

STR Trend Reports

Provide current and previous year monthly, year-to-date and rolling 12 months statistics for commercial accommodation providers in Greater Victoria.

Metrics include:

- Occupancy Rate (%)
- Average Daily Room Rate ($)
- RevPAR ($)
- Room Supply and Demand (n)
- Revenue ($)

Large and broad sample, although varies month to month.

Statistics supplement Chemistry Consulting's Victoria Tourism Bulletins.

Industry-standard proprietary reports by subscription only.

Destinations International Event Impact Calculator

- Measures the economic impact of an event held in Greater Victoria.
- Required <u>inputs</u> are the main parameters of the event as well as organizer spending.
- Key <u>outputs</u> (results) are:
  - ➢ Business sales generated by event
  - ➢ Jobs supported by the event, including annual FTEs
  - ➢ Contributions to federal, provincial and local taxes
  - ➢ Return on investment

Economic Impact	=	Business Sales	Employment Impact	Contribution to Taxes	Return on Investment

- Platform based on models developed by Tourism Economics, part of Oxford Economics.
- Analysis is based on city-specific data.
- Tool for assessing the value and contribution of events to Greater Victoria’s economy.

Four Event Impact Calculator Modules

Meetings

- Trade Shows
- Conventions
- Business Meetings

Sports

- Youth Amateur
- Adult Amateur
- College
- Professional
- Championships

Festivals & Cultural Events

- Performing Arts
- Food and Drink
- Film and Award Ceremonies
- Visual Arts
- Other Cultural

Local & Public Events

- Public and Consumer Shows
- Community Events
- Testing and Education Events
- Food and Beverage Functions

Example: ABC Festival

Event Parameters

- Start Date: 21/02/2019
- End Date: 23/02/2019
- Event Type: Festivals & Cultural Events
- 1,000 total event attendees
- Out-of-town attendees: 85%
- Overnight in paid accommodation: 75%
- Length of stay: 2 nights
- Room rate per night: $140

Organizer Spending

- Space Rental: $3,500
- Food and Beverage: $16,500
- Audio/Visual: $1,000
- Other Services: $5,000

ABC Festival Event Impact Summary

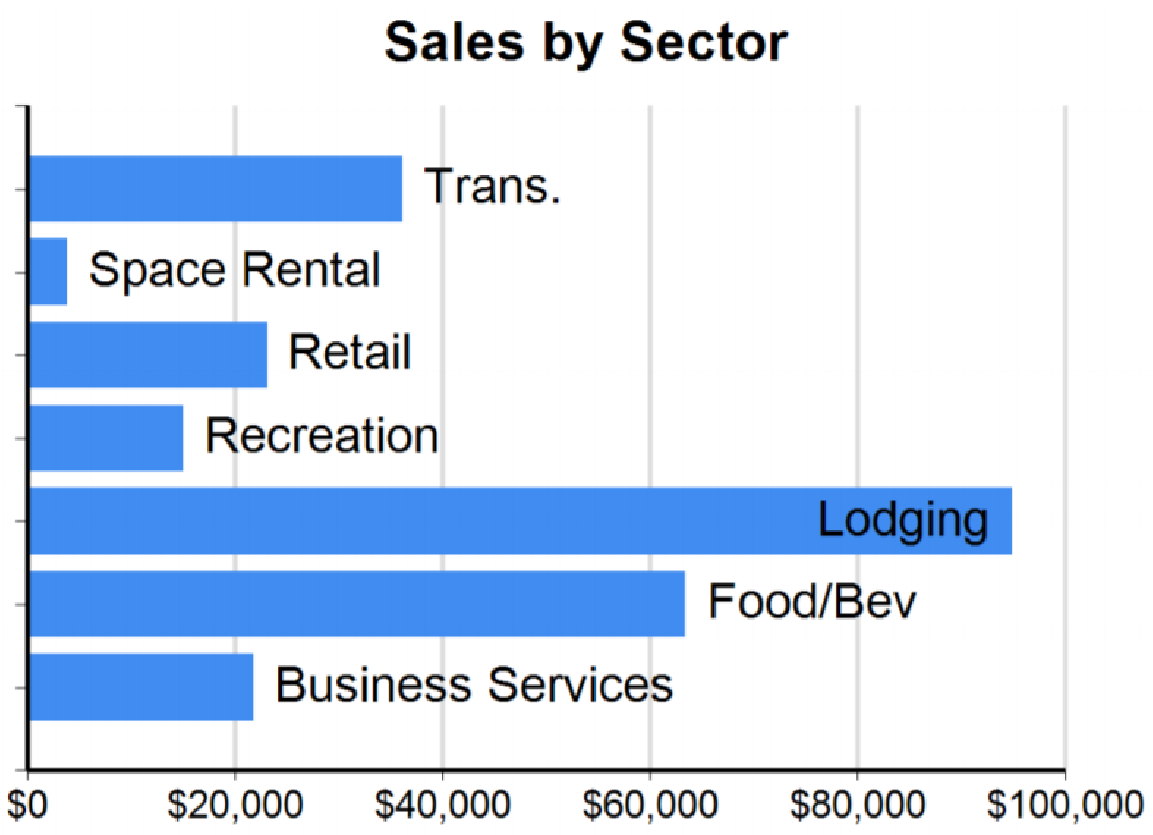
Key Results	
Business Sales (Direct)	$257,940
Business Sales (Total)	$386,557
Jobs Supported (Direct)	115
Jobs Supported (Total)	143
Contribution to Federal Taxes (Total)	$26,200
Contribution to Provincial Taxes (Total)	$39,950
Contribution to Local Taxes (Total)	$6,082

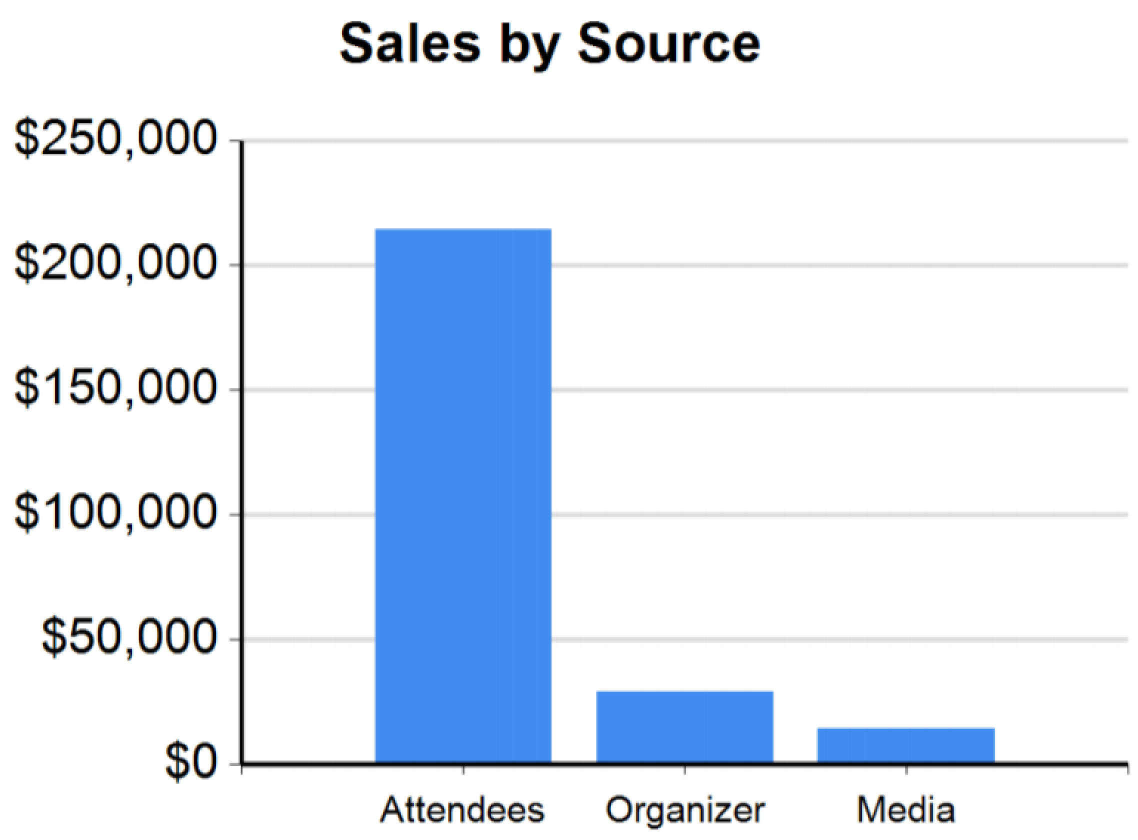
Total impacts = Direct impacts + Indirect impacts + Induced impacts

Direct Business Sales Impact per Sector

Industry Sector	Attendees	Organizer	Media/Sponsors	Total
Lodging	$93,843	$1,011	$0	$94,854
Transportation	$35,908	$97	$62	$36,067
Food & Beverage	$46,778	$16,500	$35	$63,313
Retail	$23,137	$0	$0	$23,137
Recreation	$14,969	$0	$0	$14,969
Space Rental	$0	$3,500	$281	$3,781
Business Services	$0	$7,960	$13,858	$21,818
Total	**$214,635**	**$29,068**	**$14,237**	**$257,940**

Direct Business Sales by Sector and by Source





Statistics Canada Overnight Visitor Surveys

- The *National Travel Survey* (NTS) collects information about overnight travel by Canadian residents, both within Canada and outside Canada.
- The *Visitor Travel Survey* (VTS) collects information about overnight travel to Canada by United States and International residents.
- Jointly these reports show
  - ➢ Total <u>number of visitors</u> from each origin
  - ➢ Total <u>expenditure by visitors</u> from each origin
- Results for both surveys are published quarterly and verified annually, with up to 12-months lag. 2019 data are expected in late 2020.

Number of Visitors to Greater Victoria in 2018

Year / Quarter	Canada	USA	International	All
2018 Q1	677,000	71,000	59,000	807,000
2018 Q2	722,000	279,000	155,000	1,156,000
2018 Q3	785,000	448,000	256,000	1,489,000
2018 Q4	561,000	127,000	50,000	738,000
2018 Total	**2,745,000**	**925,000**	**520,000**	**4,190,000**
2018 %	**65.5%**	**22.1%**	**12.4%**	**100%**

Province of Origin	n	% of Visitors to Victoria
British Columbia	2,352,000	56.1
Alberta	190,000	4.5
Ontario	113,000	2.7
Other	90,000	2.2
Total	**2,745,000**	**65.5**

Expenditure by Visitors to Greater Victoria in 2018

Year / Quarter	Canada		USA		International	
	Total Expenditure	Per Visitor	Total Expenditure	Per Visitor	Total Expenditure	Per Visitor
2018 Q1	$148,308	$219	$32,632	$460	$29,082	$493
2018 Q2	$169,072	$234	$108,704	$388	$112,167	$724
2018 Q3	$278,940	$355	$224,227	$501	$153,791	$601
2018 Q4	$144,052	$257	$54,225	$427	$31,450	$641
2018 Total	**$740,372**	**$270**	**$419,788**	**$440**	**$326,490**	**$628**

Province of Origin	Total Expenditure	Per Visitor
British Columbia	$486,863	$207
Alberta	$125,468	$660
Ontario	$56,512	$500
Other	$71,529	$794
Total	**$740,372**	**$270**

Other Sources of Information

- Industry and sector reports from Destination Canada and Destination BC.

- Industry and sector reports from tourism research organizations and consultancies:
  - Travel and Tourism Research Association (TTRA)

    DGV is TTRA member. Victoria hosting TTRA International Conference June 16-18, 2020.
  - Destinations International, Skift, McKinsey, CBRE

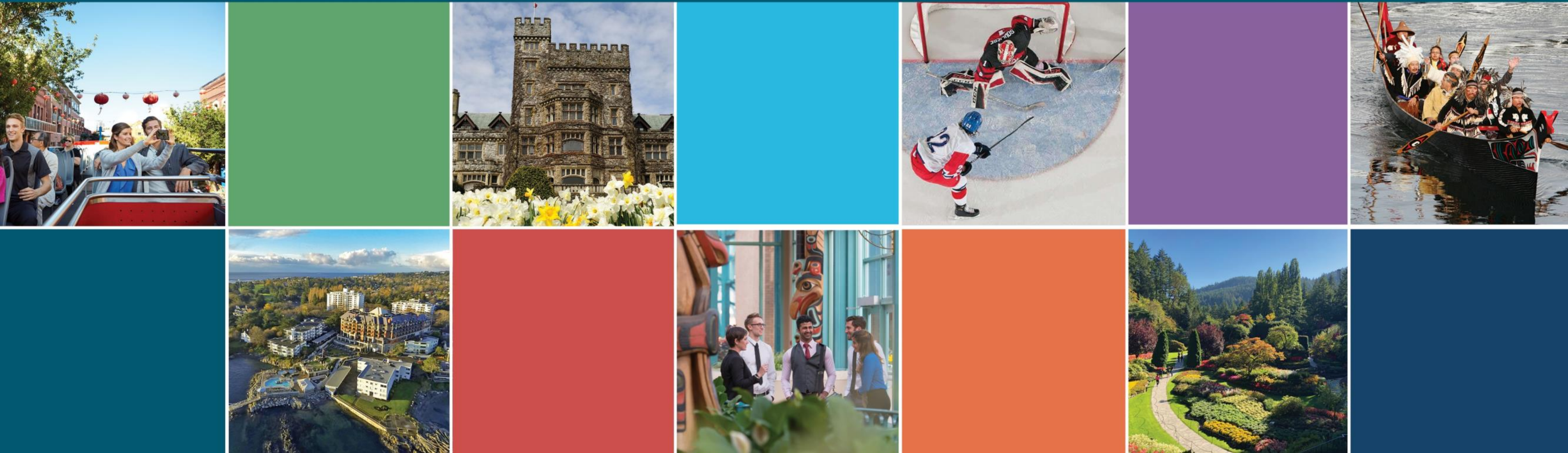
- Articles in research journals:

  Journal of Travel Research *International Journal of Tourism Research* *Tourism Management*

  Annals of Tourism Research *Journal of Travel & Tourism Marketing*

- Economic impact studies
  - DGV and InterVISTAS 2018: *Economic Impact of Tourism in Greater Victoria, BC*

Destination Greater Victoria's 2019 Visitor Survey



Aims and Objectives

Destination Greater Victoria partnered with Align Consulting on a full-year study of overnight visitors to Greater Victoria.

Aims: (1) understand overnight visitation <u>each season</u>, unlike previous studies.

(2) produce a large, multivariate dataset to inform decision making.

Core objectives for the research were to:

- Identify visitor and trip characteristics each season and across the year
- Understand visitation patterns and visitor preferences
- Measure visitor expenditure and the visitor experience
- Use best-practice methods that are repeatable over time

Data Collection 1 – Intercept Survey

- **4,002** semi-structured in-person interviews with overnight visitors.
- 10 to 15 minutes to complete.
- Up to 25 questions about:

Gender, age and advance planning	Purpose of visit and previous visitation	Market origin (province, state or country)	Travel party size and composition
Duration of visit	Accommodation and booking method	Mode of arrival	Activities during visit

Data Collection 1 – Intercept Survey

Four interview locations within or near Victoria's downtown core:

- Inner Harbour and Visitor Centre 41%
- Downtown Shopping Area 9%
- Royal BC Museum Forecourt 40%
- Fisherman's Wharf 10%

Data collected in four waves, each corresponding to a season within the tourism calendar:

Wave	Data Collection	Season	Months of Season
1	October 2018	Fall	September, October, November
2	January 2019	Winter	December, January, February
3	April 2019	Spring	March, April, May
4	July 2019	Summer	June, July, August

Data Collection 2 – Online Follow-Up Survey

Online questionnaire sent to interview respondents 2 to 3 weeks after interview when returned home. Response rate 41%. **986** surveys completed.

15 to 20 minutes to complete.

Up to 24 questions about:

Main trip destination and locations visited	Activities and tours during visit	Age, gender and relationship of travel party	Expenditure while visiting Greater Victoria
Annual household income	Highlights and shortcomings of visit	Satisfaction with various aspects of visit	Suggestions to enhance visitor experience

Data Weightings and Seasonal Sample Sizes

- To minimise potential skew from over or under sampling each season, data were weighted to reflect Statistics Canada's seasonal visitor volume benchmarks:

  Winter = 18.0% Spring = 24.5% Summer = 39.0% Fall = 18.5%

- Seasonal sample sizes after weighting were:

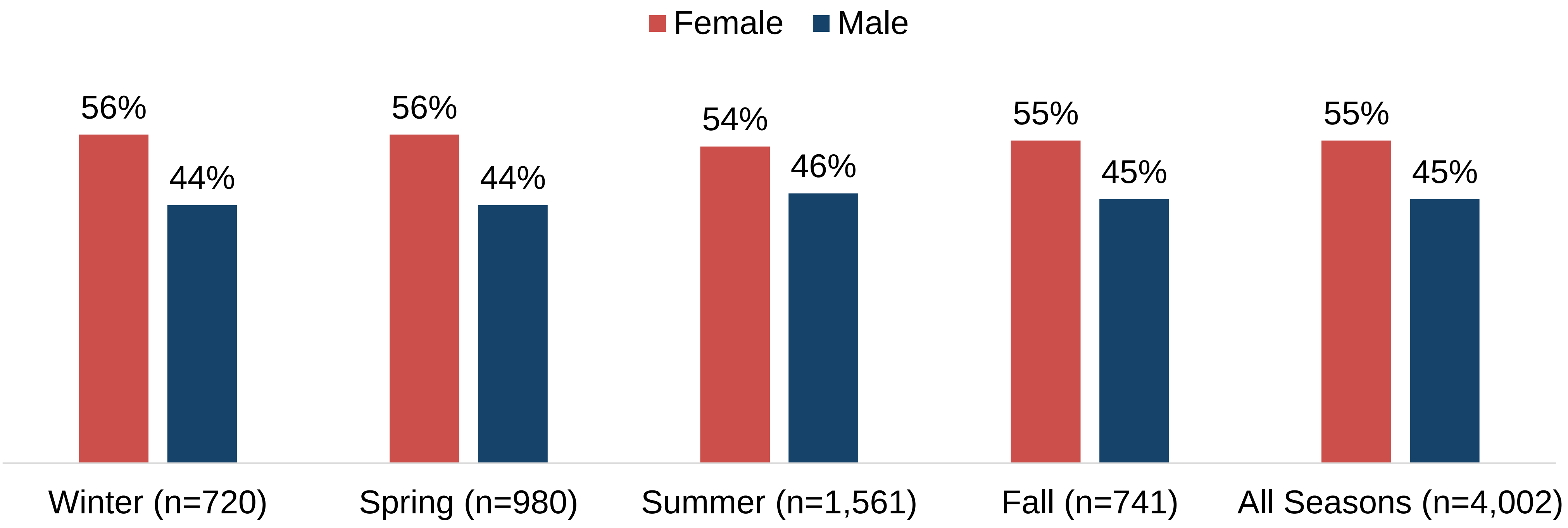
Survey	Winter	Spring	Summer	Fall	All Seasons
Intercept Interview Surveys	720	980	1,561	741	4,002
Online Follow-Up Surveys	177	242	385	182	986

Profile of Sample

Gender Distribution

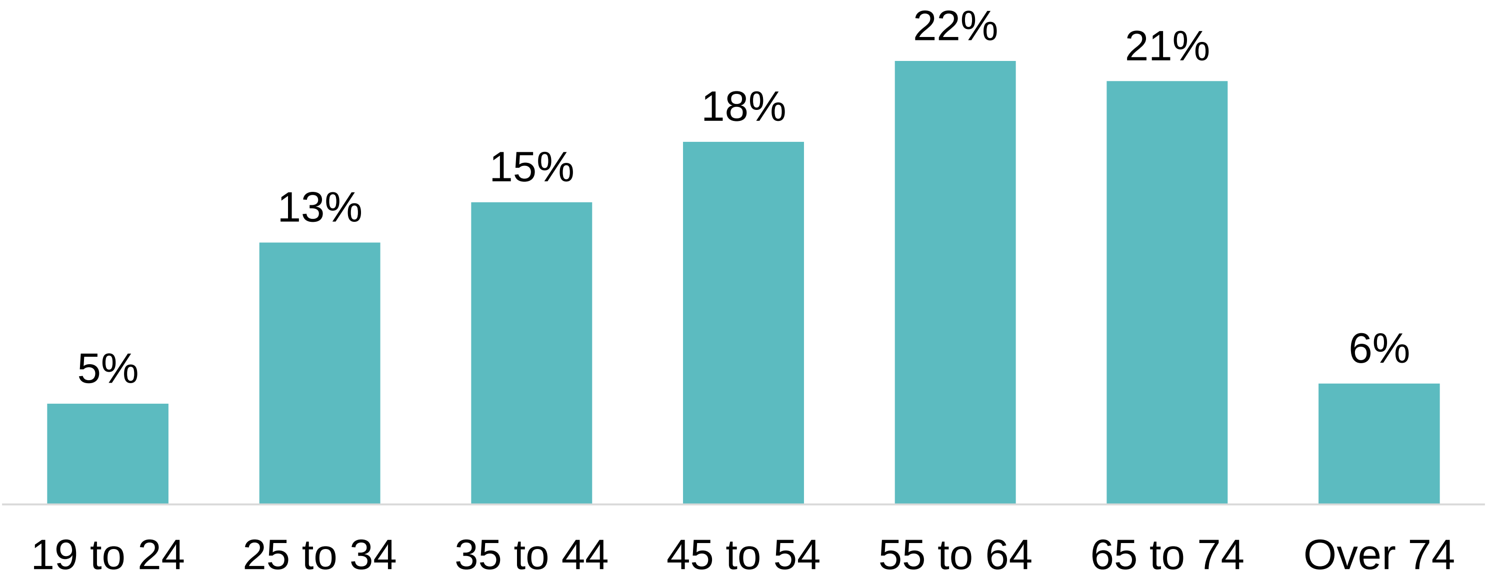
Across all seasons, 55% of visitors surveyed were female and 45% were male.

Proportions were consistent each season.



Age Distribution

The most frequent age category of visitors was **55 to 64 years** (22%), followed by **65 to 74 years** (21%) and **45 to 54 years** (18%).



Two thirds of visitors were more than 44 years of age.

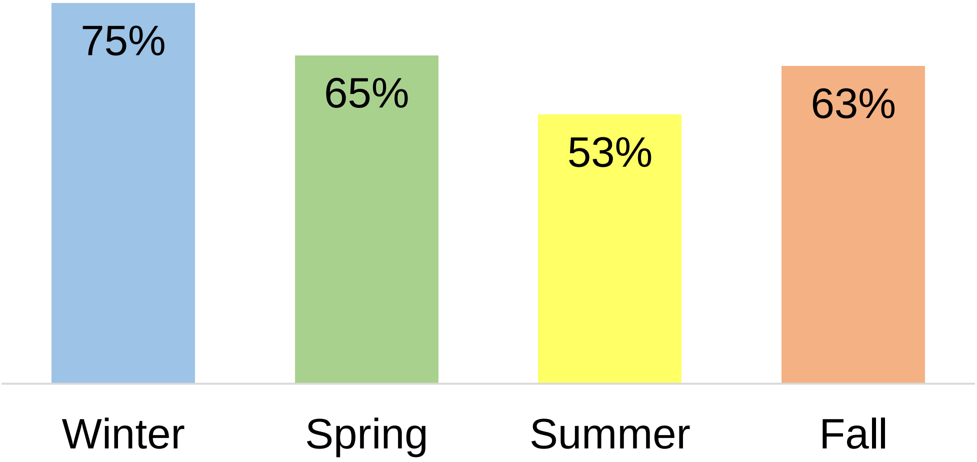
Age distributions were broadly consistent each season.

Visitor Characteristics

Previous Visitation

63% of visitors surveyed had visited Greater Victoria previously.

Previous visitation differed seasonally:



Two-thirds of previous visitors had visited overnight at least once in the past 2 years.

Visitors in winter and fall had more overnight visits in the past 2 years (median: 2 visits) than those in spring or summer (median: 1 visit).

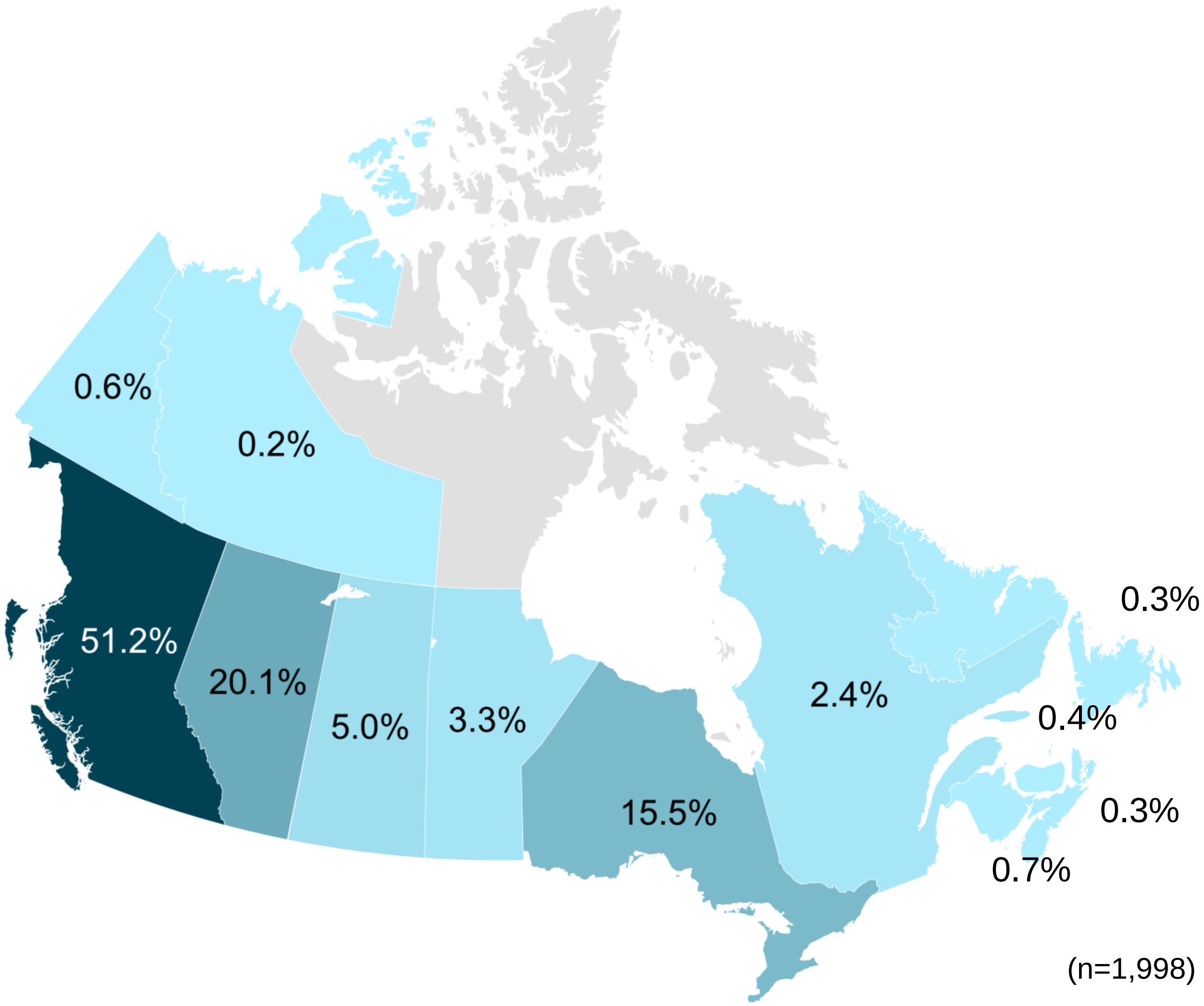
Visitor Origin

Most visitors to Greater Victoria were from within Canada (50%), followed by the USA (31%) and International locations (19%).

Visitor origins varied seasonally:

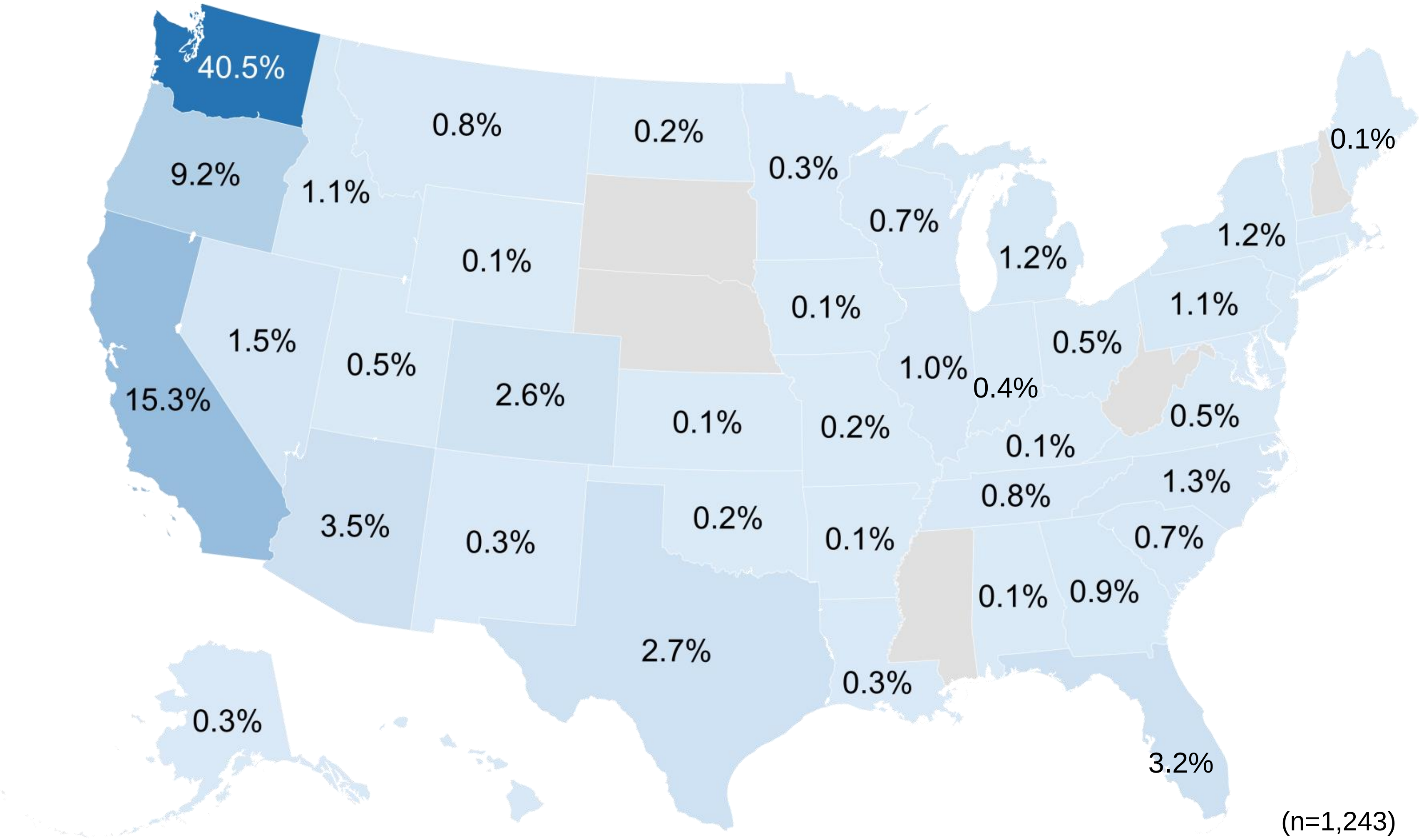
Market Origin	Winter (n=720)	Spring (n=980)	Summer (n=1,561)	Fall (n=741)	All Seasons (n=4,002)
Canada	72%	56%	36%	49%	50%
USA	16%	28%	40%	31%	31%
International	12%	16%	24%	20%	19%

Origin of Visitors from within Canada



(n=1,998)

Origin of Visitors from the USA



(n=1,243)

Top 10 Market Origins

Market Origin	Winter (n=720)	Spring (n=980)	Summer (n=1,561)	Fall (n=741)	All Seasons (n=4,002)
Greater Vancouver	21%	16%	8%	11%	13%
Washington	9%	16%	11%	14%	13%
Alberta	10%	12%	8%	10%	10%
Ontario	11%	7%	7%	8%	8%
Other BC	7%	7%	6%	9%	7%
Vancouver Island	10%	5%	2%	7%	5%
California	2%	3%	7%	4%	5%
United Kingdom	1%	5%	7%	4%	5%
Oregon	1%	2%	4%	3%	3%
Australia	2%	2%	3%	3%	3%

Travel Party Size and Characteristics

Median travel party size was **2**. This was also the case each season.

Larger party sizes were most common during summer and least frequent in winter.

Solo travellers were:

- More likely to be female and in older age categories
- Often visiting family or friends, or for business or a conference
- Least likely to have travelled from the USA

- 86% of visitors were travelling with family or friends – similar each season.
- Only 4% of visitors were part of a group tour – usually international visitors.

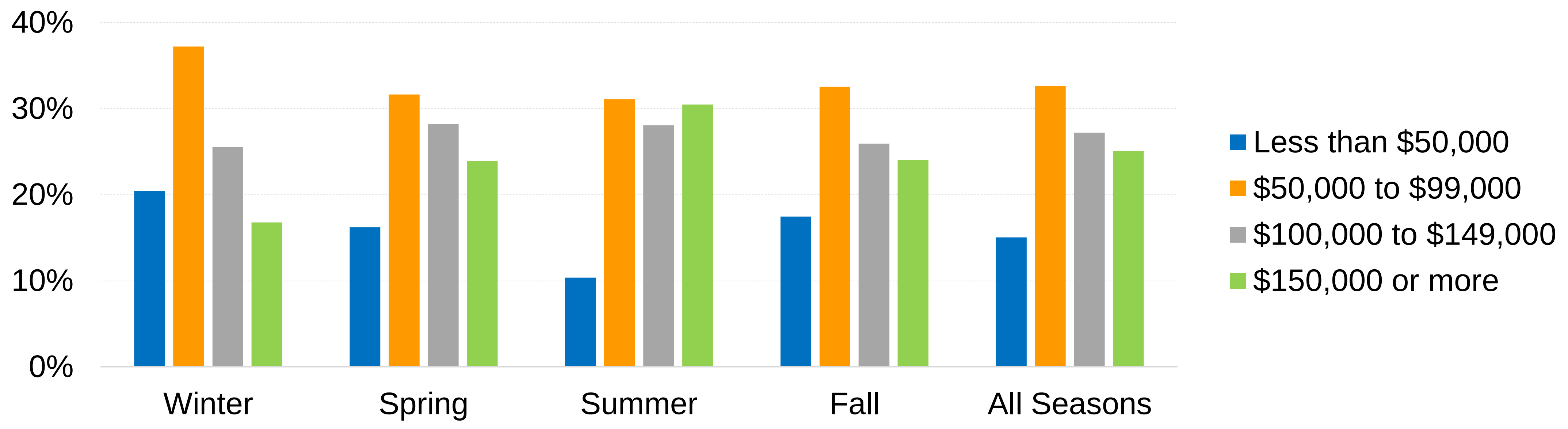
Travel Party Composition

Travel Party Composition	Winter (n=177)	Spring (n=238)	Summer (n=374)	Fall (n=180)	All Seasons (n=969)
Spouse or Partner	62%	56%	46%	59%	54%
Immediate Family	20%	24%	28%	21%	24%
Extended Family	5%	5%	8%	3%	6%
Friends	5%	9%	12%	11%	10%
Work Colleagues	4%	3%	2%	3%	3%
Other	4%	3%	4%	3%	3%

Household Income

Annual before-tax household income was converted into Canadian dollars for analysis.

Most common annual household income (**33%** of visitors) is CAD **$50,000 to $99,999**.

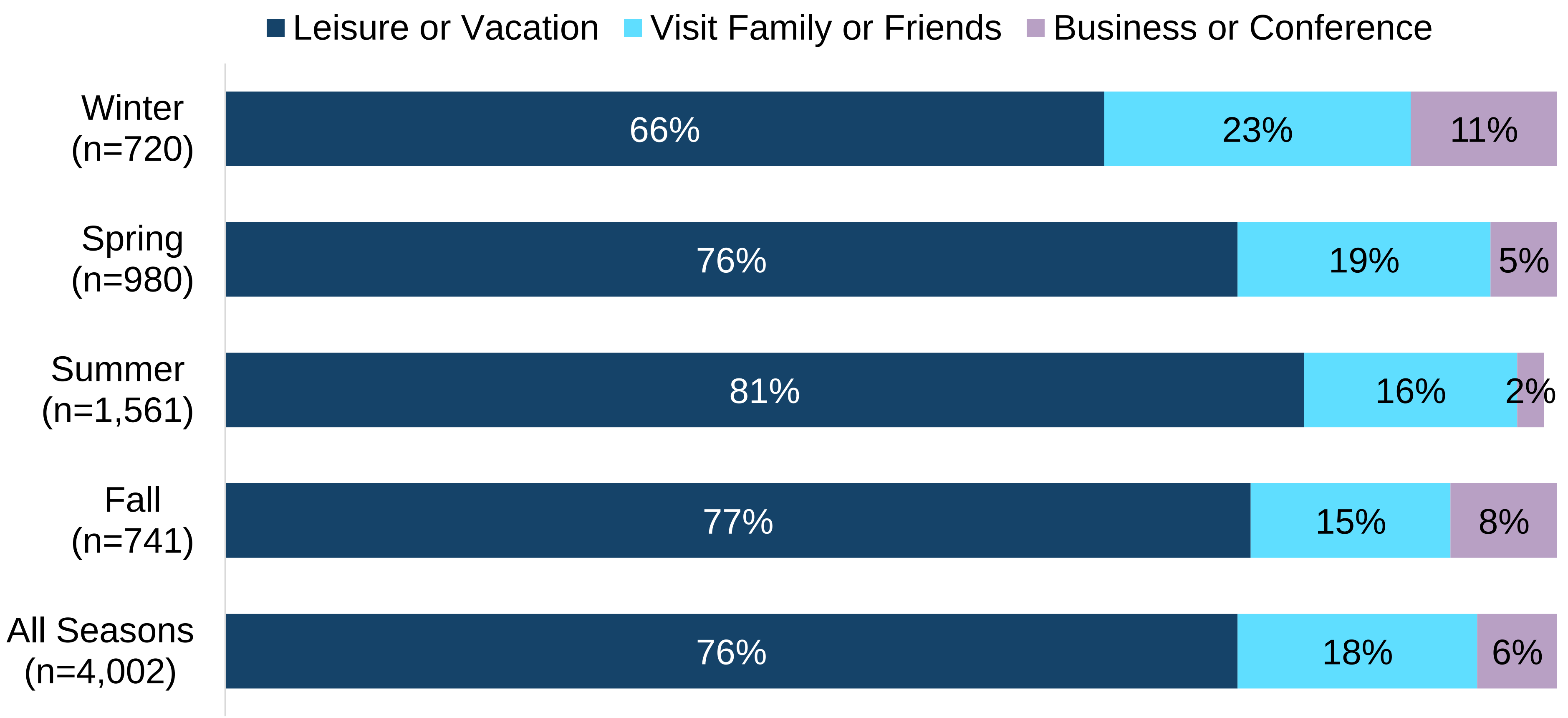


Visitors with household income of $150,000 or more were most common in summer, as expected (given exchange rates) with more US and international visitors at that time.

Visit Characteristics

Purpose of Visit

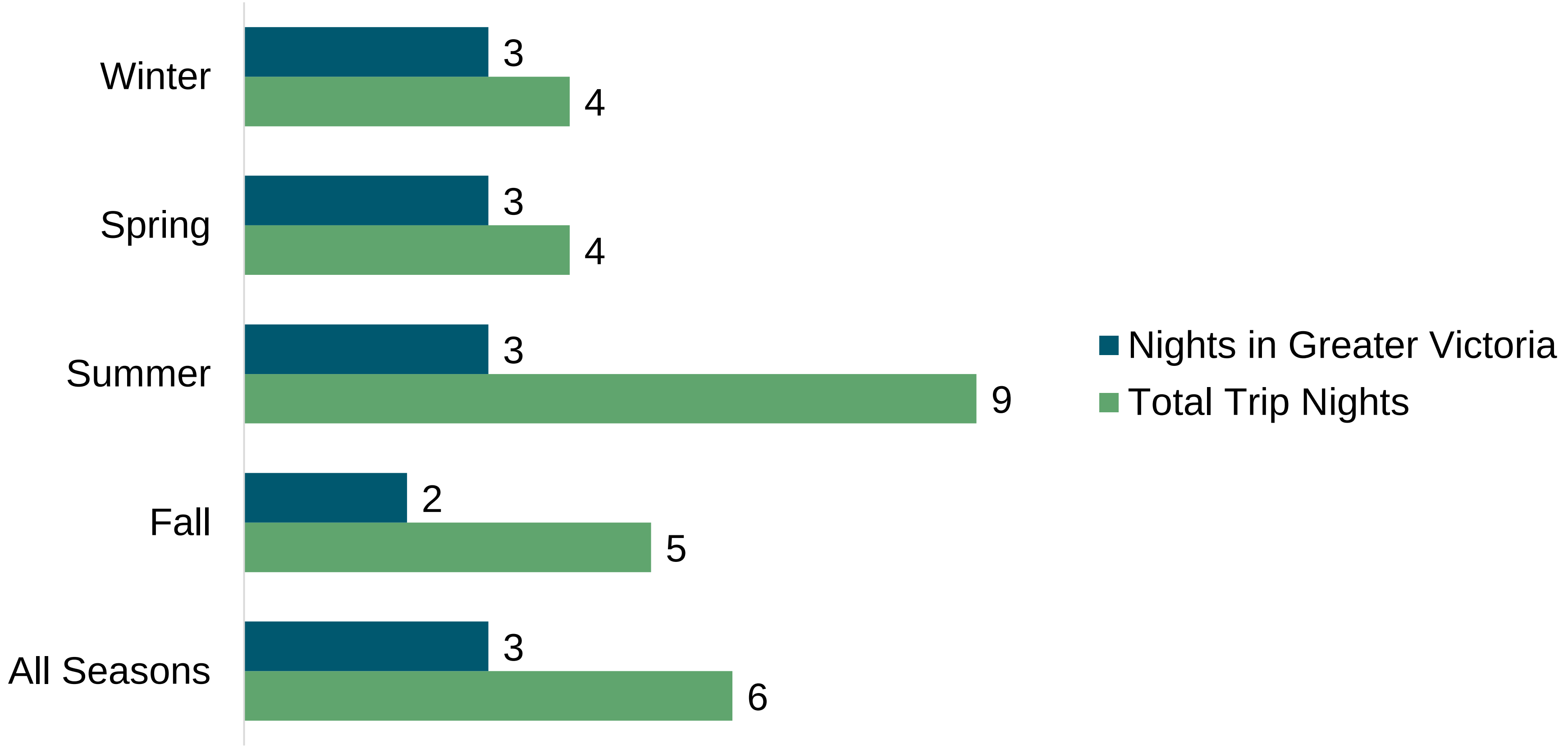
Leisure is the most common trip purpose across all seasons, particularly during summer as expected given the relatively greater presence of travellers from outside Canada.



Duration of Stay and Trip Duration

Visitors average **3** nights in Greater Victoria.

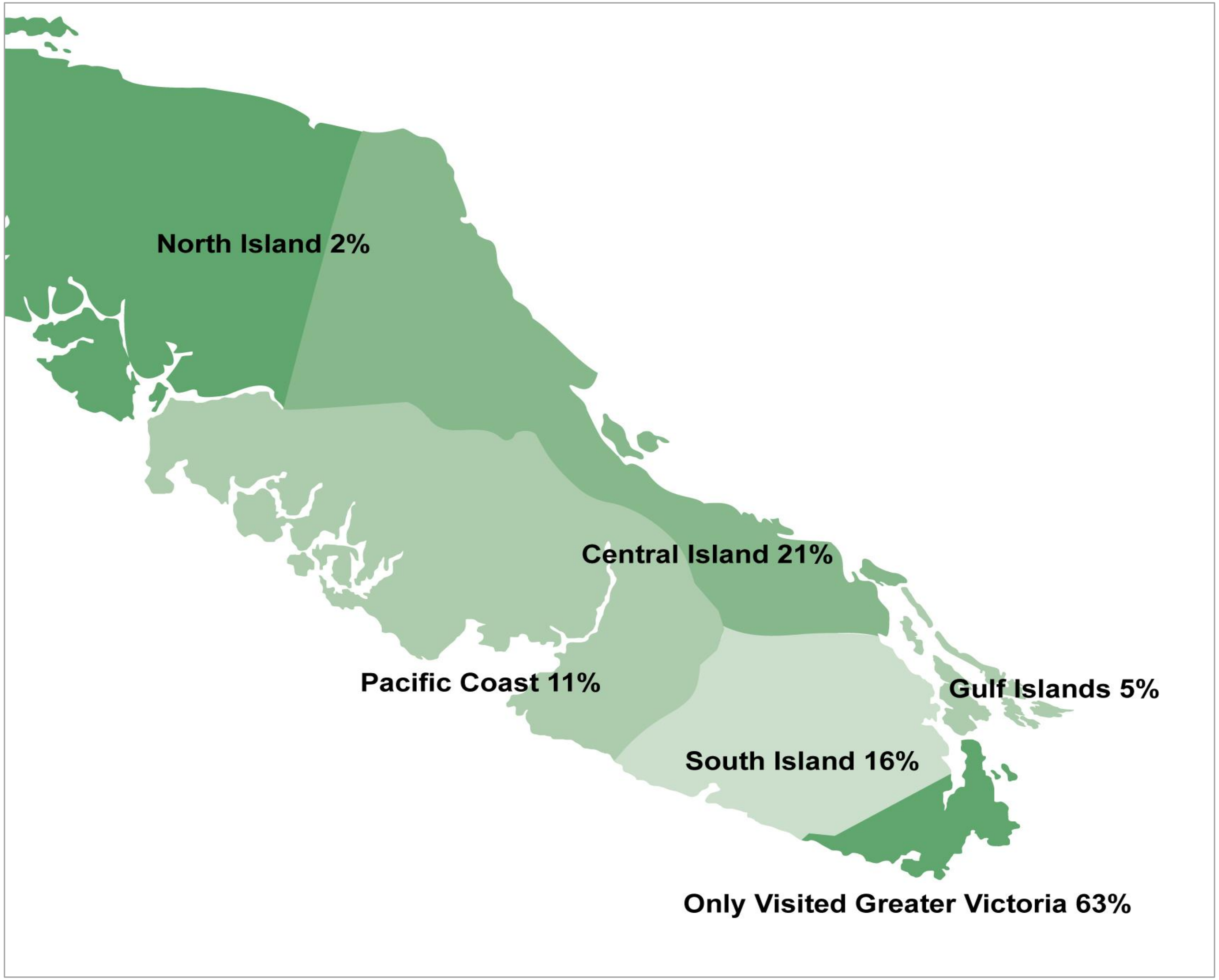
Average trip duration away from home is **6** nights.



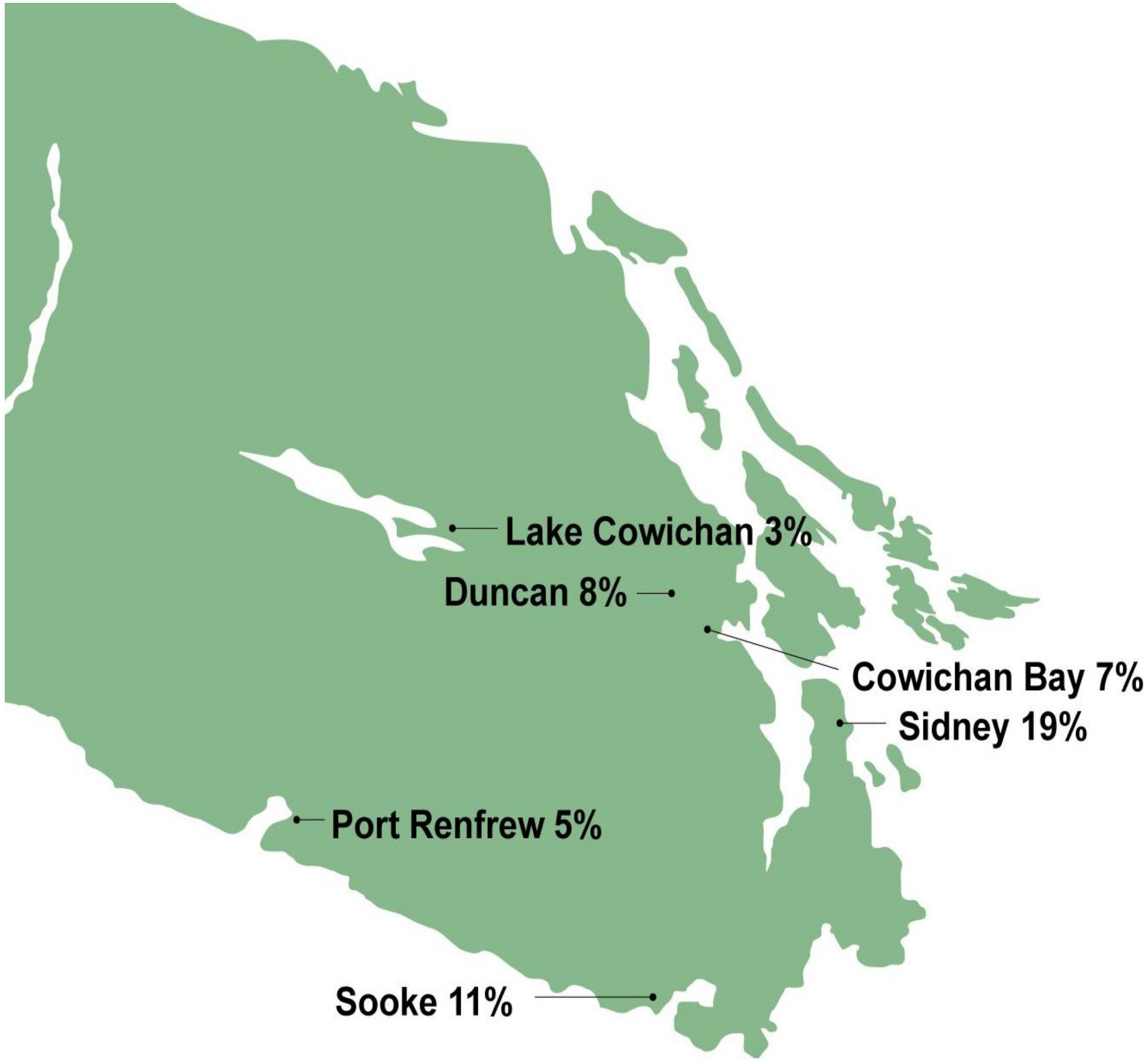
Advance Planning and Areas Visited

- Median advance planning window for visitors was **2 months**.
- Advance planning was longest for visitors in summer (median: 3 months),which reflects a relatively larger proportion of international and US visitors at that time as well as longer trip durations.
- Advance planning was shortest (median: 1.5 months) for visitors in winter, who were mainly from within Canada and likely to be more familiar with Victoria.
- Leisure or vacation visitors planned further in advance than those visiting for a conference or business or visiting family and friends.
- Greater Victoria was the primary destination for **71%** of visitors overall, ranging from 58% during summer to 85% in winter.
- Across all seasons, **63%** of visitors only visited Greater Victoria while they were on Vancouver Island.

Proportion visiting areas of Vancouver Island



Proportion visiting Pacific Marine Circle Route locations



Arrival and Accommodation

Mode of Arrival

Across all seasons, visitors most frequently arrived in Greater Victoria

- on BC Ferries (43%),
- by airline into Victoria International Airport (26%), or
- by ferry from Washington State – MV Coho, Clipper or WSF (21%).

Of visitors arriving in Greater Victoria on BC Ferries:

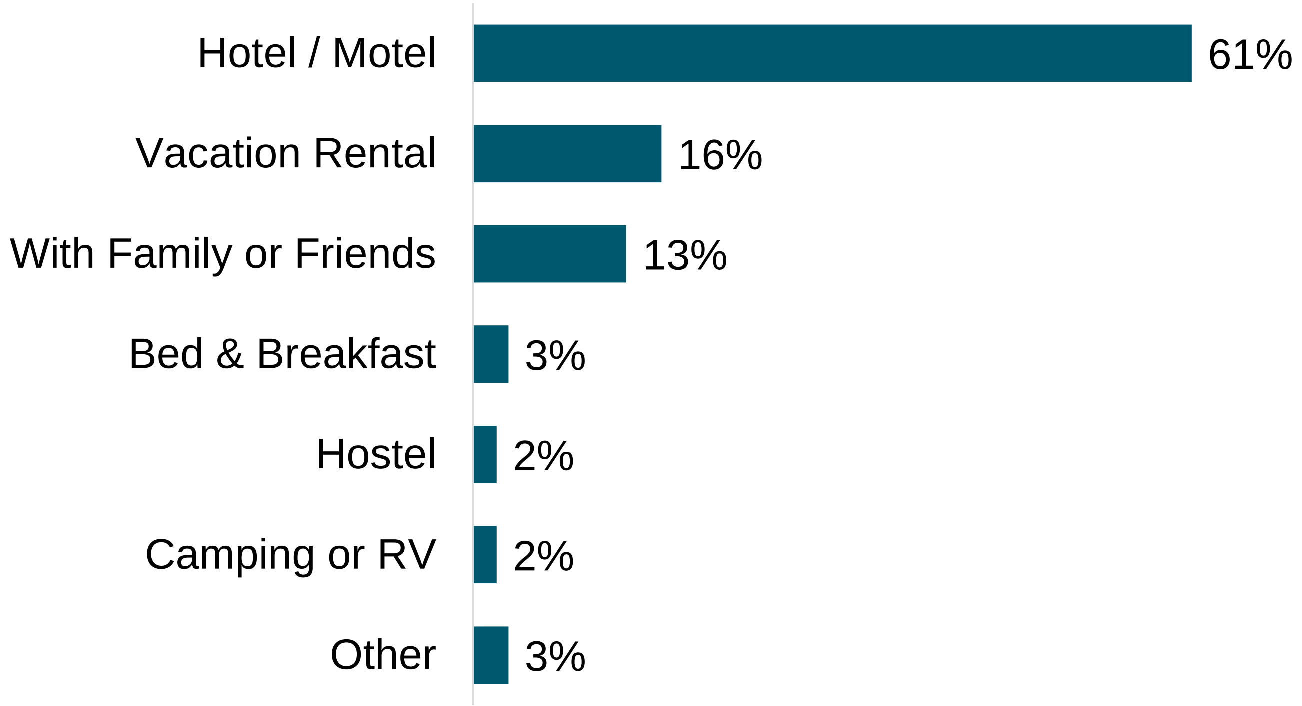
69% travelled with a vehicle

19% travelled as a walk-on passenger

12% travelled on a coach bus

Type of Accommodation

Two-thirds of visitors stay in a hotel, motel, bed & breakfast or hostel.



The mix was similar each season, except that camping or RV accommodation was used more frequently during summer and rarely in winter, as expected.

Travellers from within Canada were much more likely than other visitors to stay with family or friends.

Travellers from the USA were more likely than other visitors to stay in a vacation rental, bed & breakfast or timeshare, and least likely to stay with family or friends or in hostel, camping or RV accommodation.

International travellers were more likely than other visitors to use camping or RV accommodation or a hostel, while a notable proportion stayed with family or friends.

Accommodation Booking Method

- **68%** of visitors who stayed in commercial accommodation (i.e. not with family or friends) booked their accommodation online themselves**.**
- Of those who stayed in commercial accommodation and booked their accommodation themselves online:

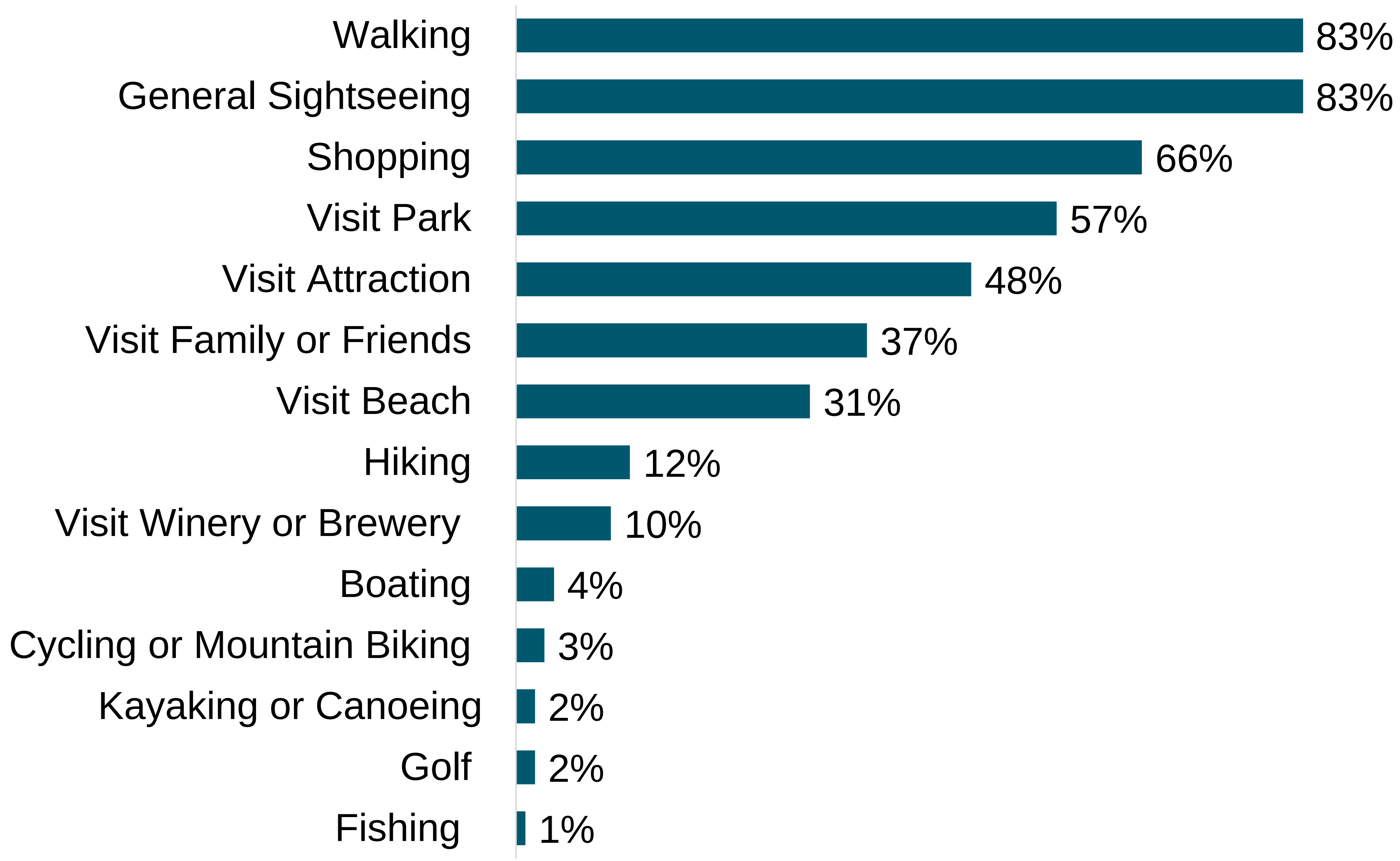
44% booked through an OTA or Travel Booking Website

34% booked direct through the Property Website

22% booked through a Short-Term Vacation Rental Website

Activities and Tours

Activities



Walking
83%
General Sightseeing
83%
Shopping
66%
Visit Park
57%
Visit Attraction
48%
Visit Family or Friends
37%
Visit Beach
31%
Hiking
12%
Visit Winery or Brewery
10%
Boating
4%
Cycling or Mountain Biking
3%
Kayaking or Canoeing
2%
Golf
2%
Fishing
1%

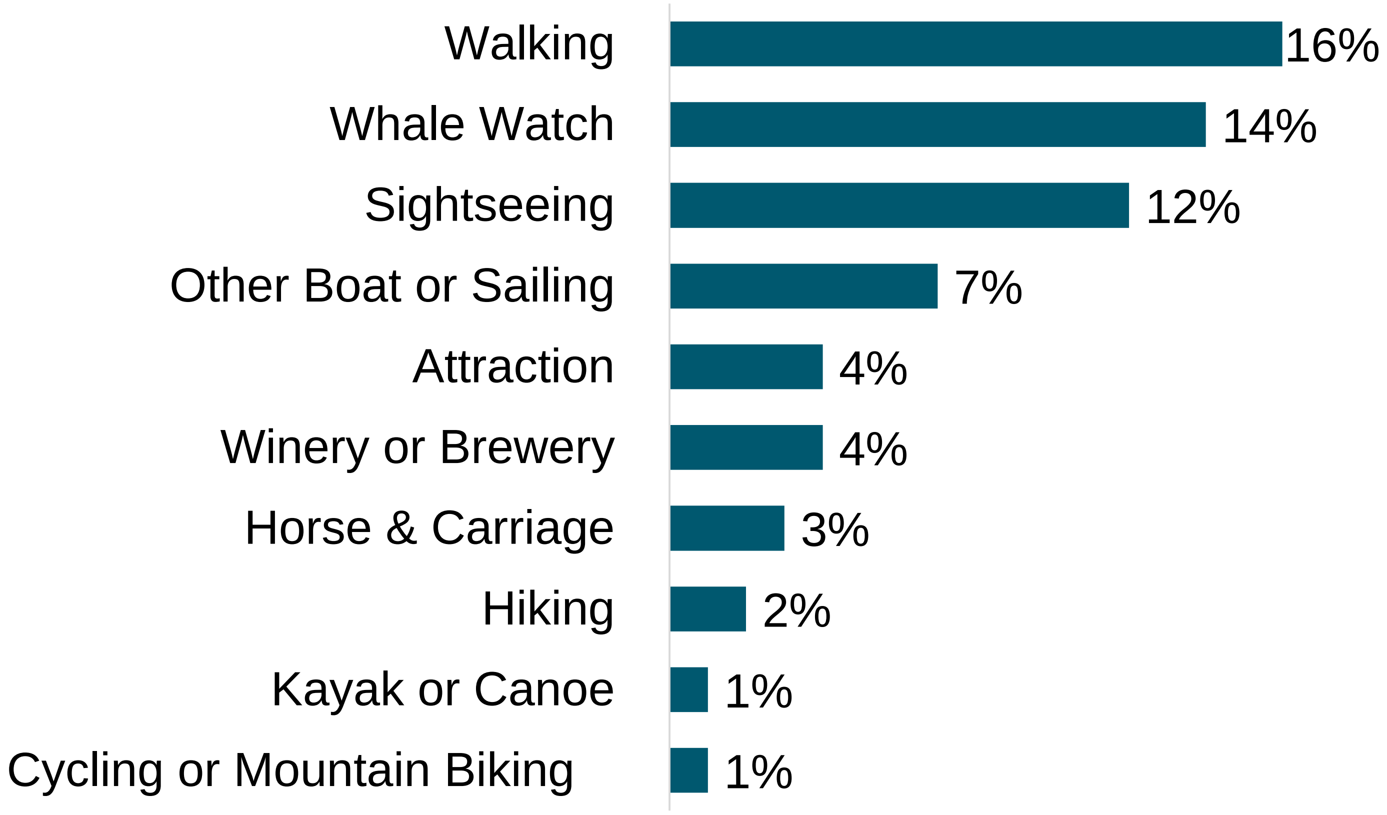
Top 5 Attractions Visited

Attraction Visited	Winter (n=80)	Spring (n=112)	Summer (n=191)	Fall (n=89)	All Seasons (n=472)
Royal BC Museum	76%	63%	51%	64%	61%
The Butchart Gardens	13%	37%	51%	31%	38%
Parliament Buildings	13%	11%	16%	17%	14%
IMAX Theatre	12%	11%	7%	5%	9%
Craigdarroch Castle	5%	5%	6%	3%	5%

Tours

41% of visitors participated in at least one tour while in Greater Victoria.

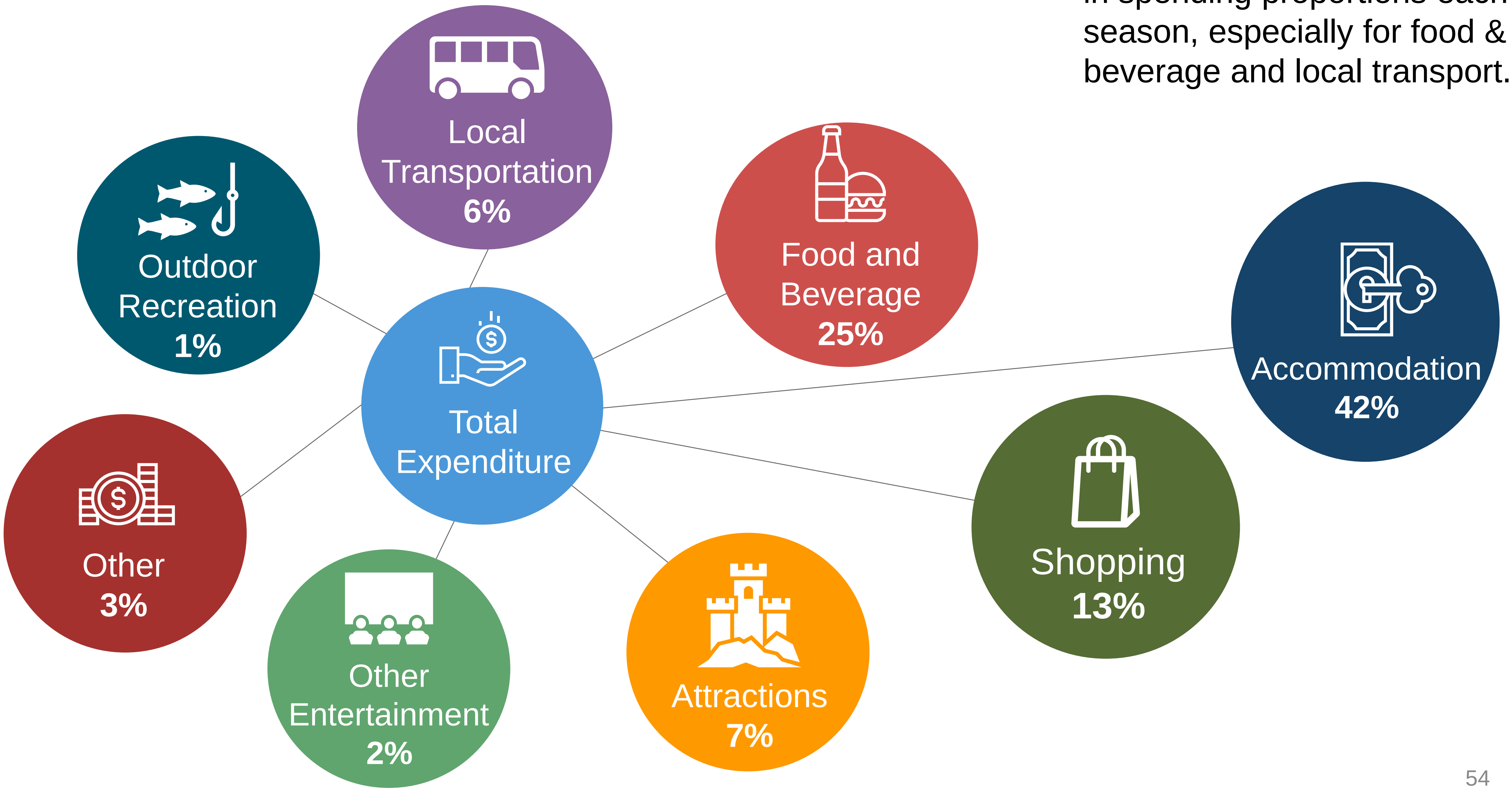
Range was from 39% in winter to 47% in summer.



Visitor Expenditure

Apportioning Visitor Spending

There was minimal variation in spending proportions each season, especially for food & beverage and local transport.



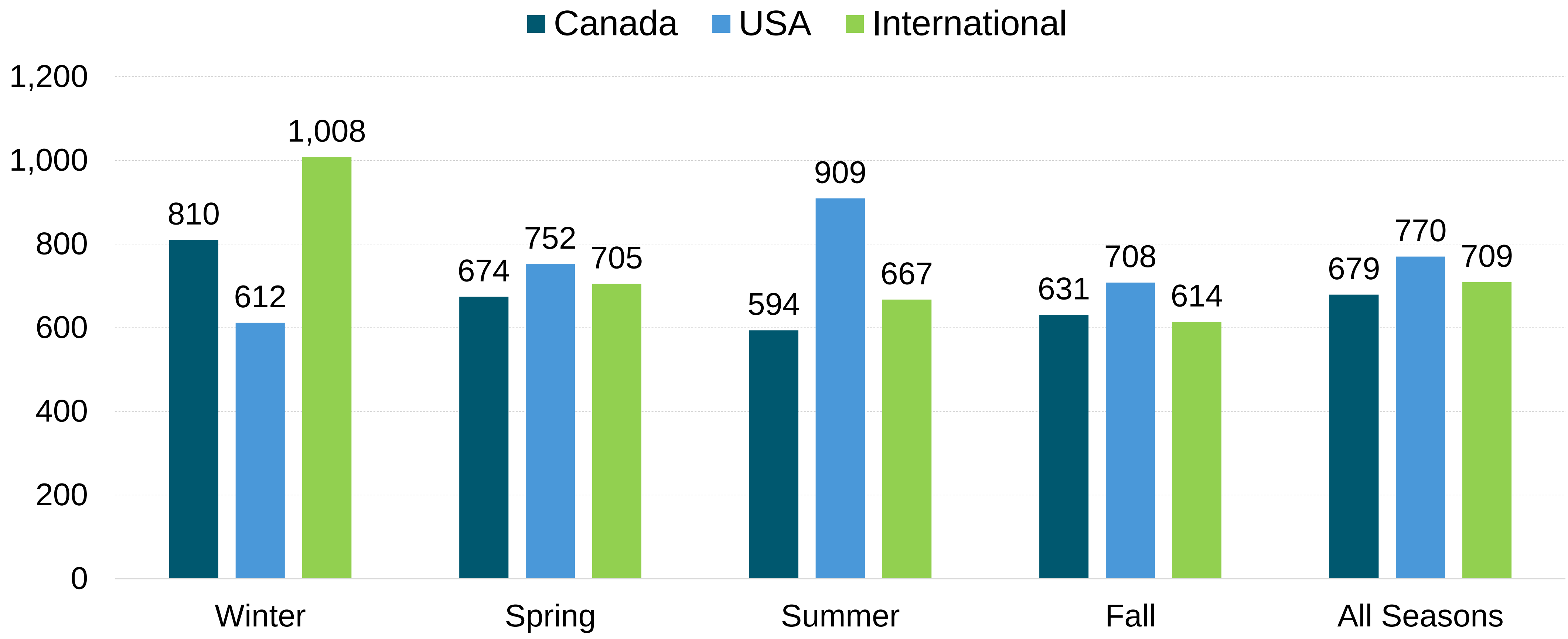
Visitor Expenditure

Expenditure Category (CAD$ Per Person)	Winter *(n = 131)*	Spring *(n = 256)*	Summer *(n = 184)*	Fall *(n = 222)*	All Seasons *(n = 793)*
Accommodation	$425	$275	$308	$244	$299
Food and Beverage	$212	$184	$167	$168	$180
Shopping	$102	$93	$77	$101	$93
Attractions	$36	$49	$65	$48	$50
Local Transportation	$50	$40	$43	$42	$43
Outdoor Recreation	$7	$9	$10	$5	$8
Other Entertainment	$19	$14	$5	$21	$15
Other	$37	$17	$21	$24	$23
Expenditure Per Person	**$888**	**$680**	**$697**	**$652**	**$710**
Expenditure Per Person Per Night	**$296**	**$227**	**$232**	**$326**	**$237**

Previous visitors to Greater Victoria spent an average of **4% more** than first-time visitors, confirming the value of repeat visitation.

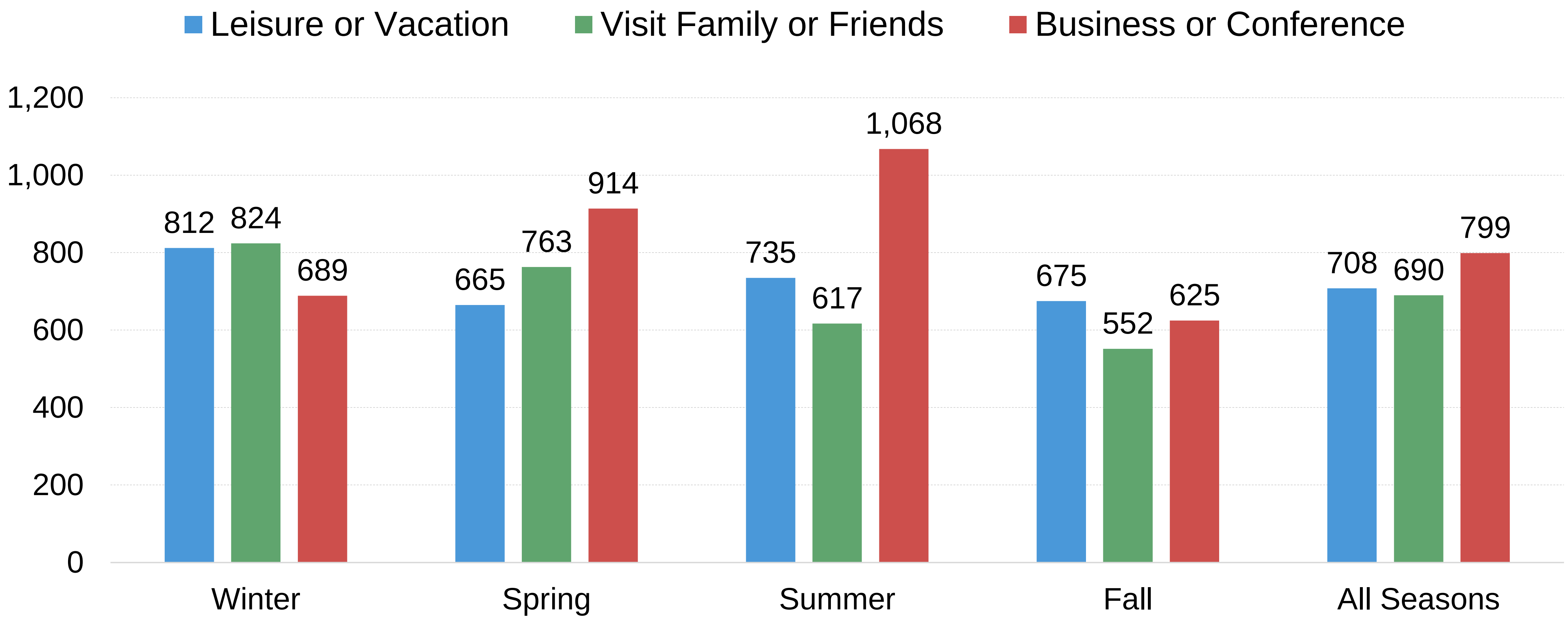
Expenditure Based on Market Origin

Average expenditure per person (CAD$) varied according to market origin



Expenditure Based on Purpose of Visit

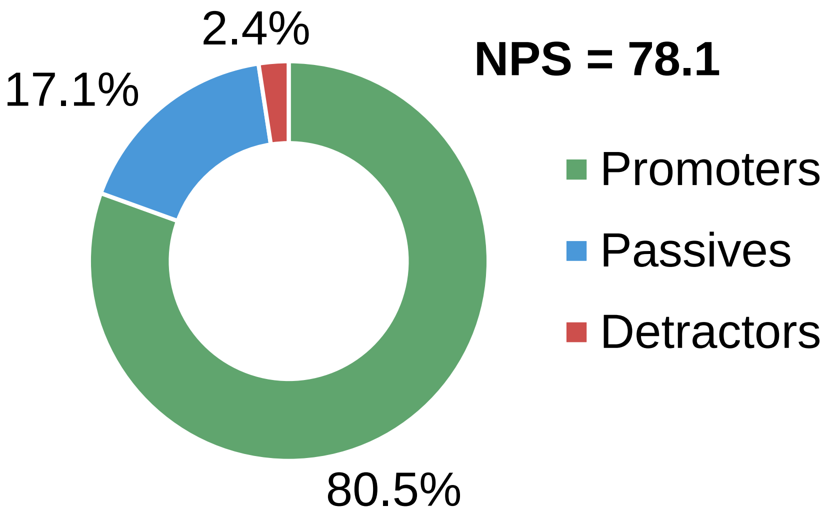
Average expenditure per person (CAD$) varied according to purpose of visit



Visitor Experience

Visitor Satisfaction

- Mean overall trip satisfaction was **4.9** out of 5.
- Accommodation (affordability and/or quality) had the most “very dissatisfied” and “dissatisfied” scores, followed by shopping, culinary and local transport.
- Average likelihood of recommend Greater Victoria as a travel destination to visit is **9.4** out of 10.
- Net promoter score (NPS) was based on scores for likelihood of recommending Greater Victoria. Visitors who scored 9 or 10 are “promoters”, those who scored 7 or 8 are “passives” and those who scored 6 or less are considered “detractors”.



Highlights of Visit

Rank	Winter (n=177)	Spring (n=242)	Summer (n=385)	Fall (n=182)	All Seasons (n=986)
1	Royal BC Museum	Royal BC Museum	Butchart Gardens	Royal BC Museum	Royal BC Museum
2	Food & Beverage	Food & Beverage	Royal BC Museum	Food & Beverage	Food & Beverage
3	Mild Weather	Butchart Gardens	Inner Harbour	Inner Harbour	Butchart Gardens
4	Ease of Walking	Inner Harbour	Food & Beverage	Butchart Gardens	Inner Harbour
5	Inner Harbour	Outdoors & Nature	Outdoors & Nature	Outdoors & Nature	Outdoors & Nature
6	Shopping	Ease of Walking	Whale Watching	Scenery	Ease of Walking
7	Scenery	Scenery	Attractions	Ease of Walking	Scenery

Shortcomings of Visit

Shortcomings were listed considerably less often than highlights, which is consistent with the high visitor satisfaction scores.

Shortcomings included:

- High levels of traffic congestion
- Lack of parking (mainly downtown)
- High nightly hotel rates
- Few options for public transit and inconvenient transit scheduling
- Poor quality of customer service
- High ferry fares

Closure of some tourism businesses and tours in winter was considered a main seasonal shortcoming.

Suggestions to Enhance Visits

Lower accommodation rates	More attractions or tour options	More food or entertainment options	Better hotel or restaurant service
More hotel options	More year-round travel options from the USA	Longer retail or restaurant hours	Improved accessibility to facilities
More businesses operating in slower seasons	Less construction and congestion, and more parking	More information about attractions and tours	More high-end shopping options

Key Insights

- Each season there are more female than male visitors to Greater Victoria. Approximately 1.2 females per male.
- Two-thirds of overnight visitors are more than 44 years of age. Almost half are from 55 to 74.
- Almost two-thirds of overnight visitors have stayed in Greater Victoria previously. 40% have stayed at least once, usually twice, within the past two years.
- Overall, half of all overnight visitors to Greater Victoria are from within Canada (mainly BC, Alberta or Ontario), one-third are from the USA (mainly Washington, California or Oregon) and one in five are from international locations (mostly the United Kingdom, Australia or Germany).
- Mix of visitors from within Canada, the USA and international locations varies seasonally. This reflects in differences in accommodation used, modes of arrival, activities engaged in and visitor expenditure per season.
- Across all seasons, Greater Victoria is primarily a short-haul destination. Core markets are Vancouver, Seattle, Calgary and San Francisco.
- Average travel party size is 2, usually spouses / partners or immediate family.

- Average duration of stay in Greater Victoria is 3 nights, or 2 nights in fall.
- Greater Victoria is primarily a leisure and vacation destination.
  Relatively few visitors are part of an organized group or tour.
- Most overnight visitors have annual household income of CAD $50,000 to $150,000.
- Most overnight visitors plan their visit 2 months in advance.
- Two-thirds of visitors arrive on BC Ferries or by flight into YYJ.
- Two-thirds of visitors stay in a hotel, motel, bed. & breakfast or hostel.
- Almost 70% of visitors book their accommodation themselves online.
- Visitors engage in a wide range of activities.
  Most frequent activities are walking, general sightseeing and shopping.
  Although activities vary seasonally, many are outdoors or attractions oriented.
- Almost 50% of visitors visit an attraction independently rather than on a tour.
- Two-thirds of visitor spending is on accommodation and food and beverage.
  Spending varies seasonally according to visitor origin and purpose of visit.

- Repeat visitors spend more than first-time visitors.
- Greater Victoria delivers a very positive visitor experience across many attributes. Visitors are very likely to recommend Greater Victoria to others as a travel destination.
- Visit highlights are mentioned much more often than shortcomings.
- Affordability may be an increasingly important factor influencing duration of visits, particularly in terms of accommodation, food and beverage, attractions, tours and local transportation.
- Affordability may be partly mitigated by adding further value to the visitor experience.

Thank You!

Questions?