



2012 In-Market Research Report



Northern BC



TourismBC

enrg RESEARCH GROUP



Executive Summary - NBC

This report summarizes key highlights for the Northern BC (NBC) region taken from the British Columbia In-Market study conducted in November 2011 and April 2012. A full report on the findings, plus summaries of the other BC tourism regions are available under separate covers.

- *Visitors to any BC region are looking for destinations which offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.*
- *Prince George is the most well-known NBC area to respondents. Residents of 'Other BC' regions have the highest familiarity with this region overall, followed by Lower Mainland residents.*
- *Key activities which motivated trips to Northern BC were visiting friends or relatives followed by sightseeing, nature and wildlife viewing.*
- *Visitors to the region were most likely to participate in sightseeing, nature, wildlife viewing; visiting friends or relatives, shopping, hiking and visiting rural communities on their trip.*
- *Just under four-in-ten (38%) respondents are likely to visit Northern BC in the next two years, most likely for a 'mini-vacation' (3-5 nights) or a 'Vacation' (6+ nights). The majority of future trips are planned for summer. Participating in outdoor recreation activities as well as experiencing scenery and nature are key motivators for future trips.*
- *The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre-trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.*
- *Lack of interest in visiting or returning to the region, as well as preferring to visit a different or international location are key reasons given by respondents who are unlikely to take a trip to Northern BC in the next two years.*
- *Just 36% of respondents familiar with NBC have a positive overall impression of the region, which ranks it 6th out of the 6 British Columbia Tourism regions. Lack of familiarity is a key challenge for the region.*



Background & Methodology

BACKGROUND

This document highlights the results of a two-part In-Market study conducted among residents of British Columbia, Alberta, Western Washington State and Eastern Washington State in late 2011 and early 2012. These surveys were conducted to update similar studies conducted in 2008 and 2006.

The purpose of these ongoing studies is to provide the Ministry and the six tourism regions with market profiles and brand attitudes from key regional markets.

DATA COLLECTION

The surveys were distributed to respondents on-line. Survey programming, hosting and data collection was undertaken by NRG Research, utilizing Research Now's on-line panel. A quota sample was used to ensure that each region had enough responses to create reliable profiles. In total, n=3,051 surveys were conducted in 2011/2012, with n=536 evaluations conducted for the Northern BC (NBC) region.

DATA ANALYSIS

The data was weighted to accurately reflect the population of travellers from each of the markets profiled, based on region, gender, age and education.

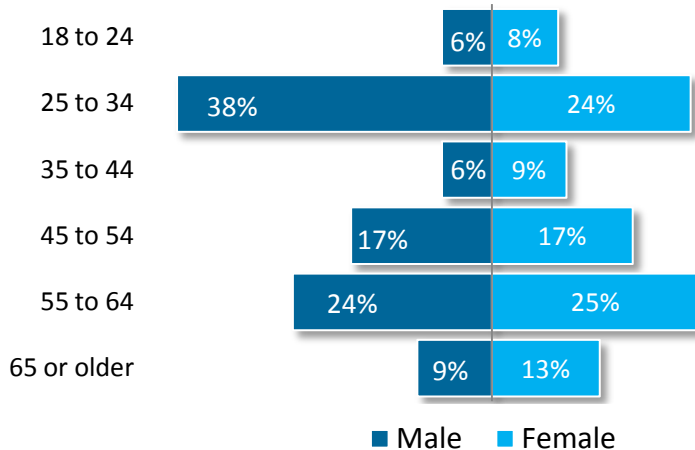


Respondent Characteristics – Northern BC

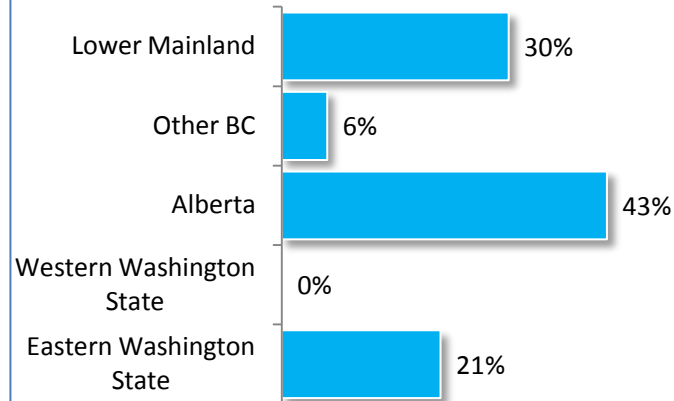
- Respondents who evaluated Northern BC (n=536) were slightly more likely to be male (55% vs. 45% female) and skewed the 25 – 34 age bracket for males. The largest group were from Alberta followed by the Lower Mainland of BC. They were predominantly post-secondary educated and represent a wide range income levels.



Gender & Age

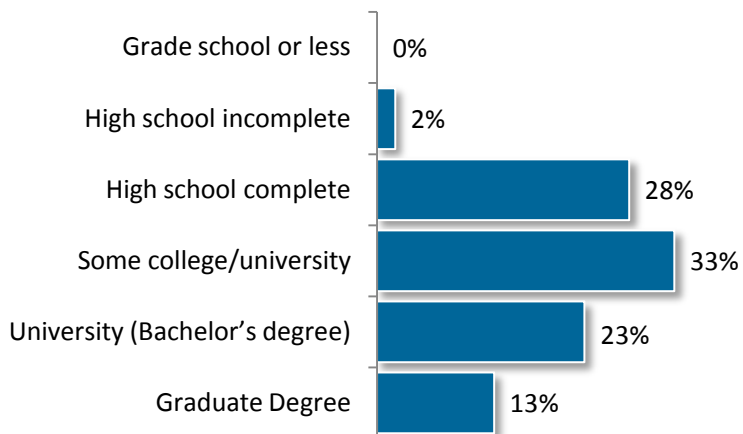


Respondent Origin

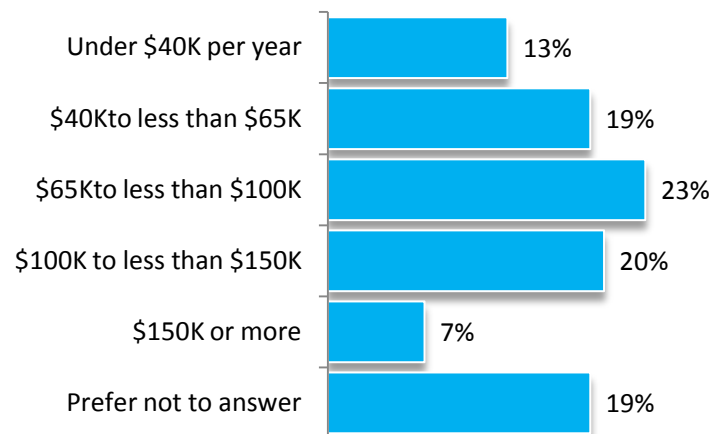


* Western Washington respondents did not evaluate NBC.

Education



Household Income

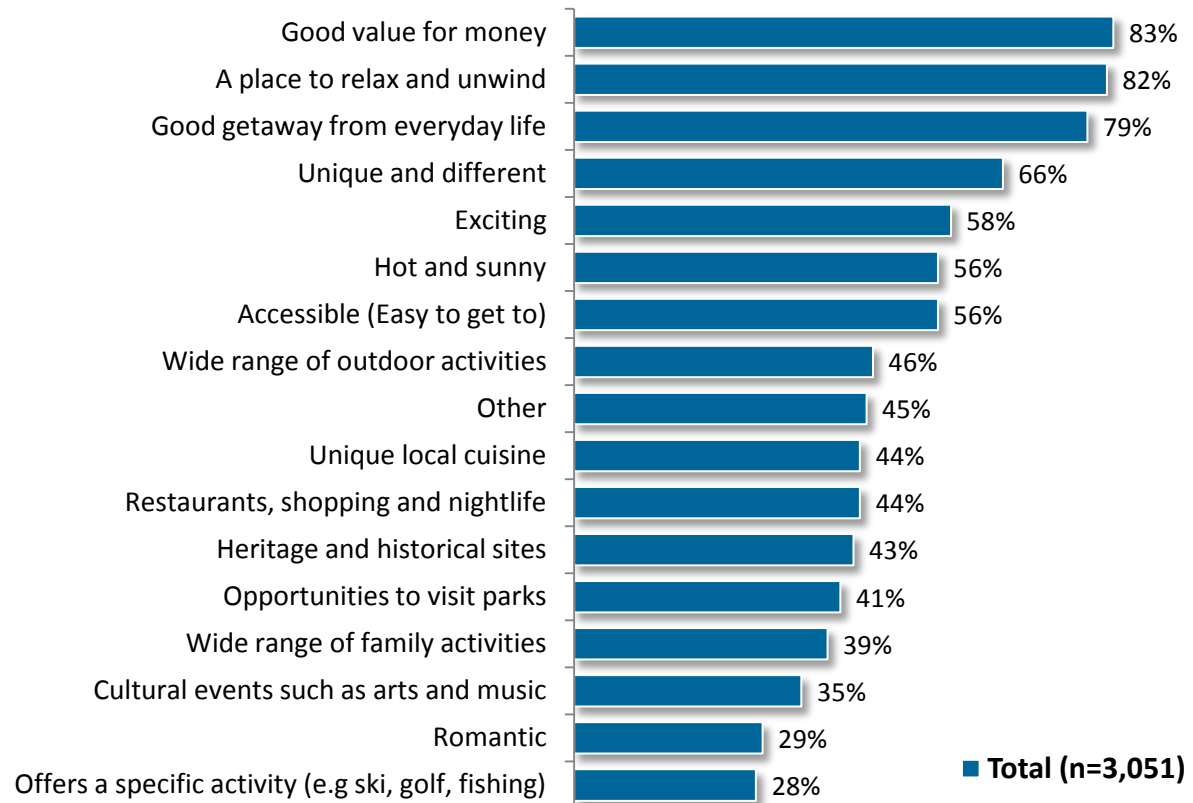


Top Factors in choosing a BC destination

- The most important factors, (top 2 box ratings*), for choosing a BC destination are those which offer good value for money, a place to relax and unwind and serves as a good getaway from everyday life. After the top three factors, there is a significant drop in the proportion of ratings to destinations which are unique and different, exciting and hot and sunny.



Top Factors in choosing a destination

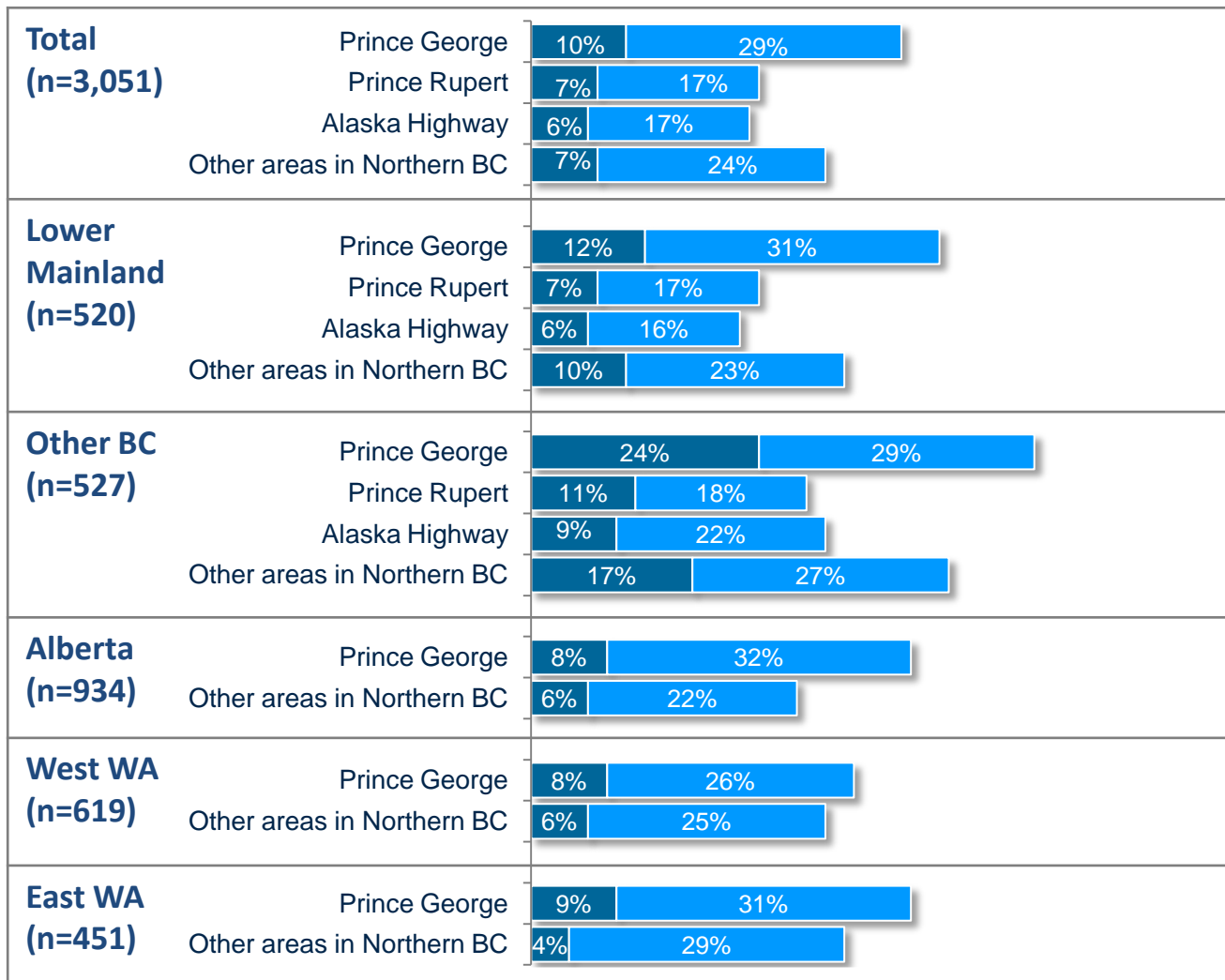


* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.



Familiarity with Northern BC – by Origin

- Prince George is the most well-known Northern BC destination. Respondents from 'Other BC' are the most familiar with the region overall. Fewer than one-in-ten residents of Alberta or Washington State consider that they are very familiar with any Northern BC area.



*Note: Only BC residents rated their familiarity with Prince Rupert & the Alaska Highway.

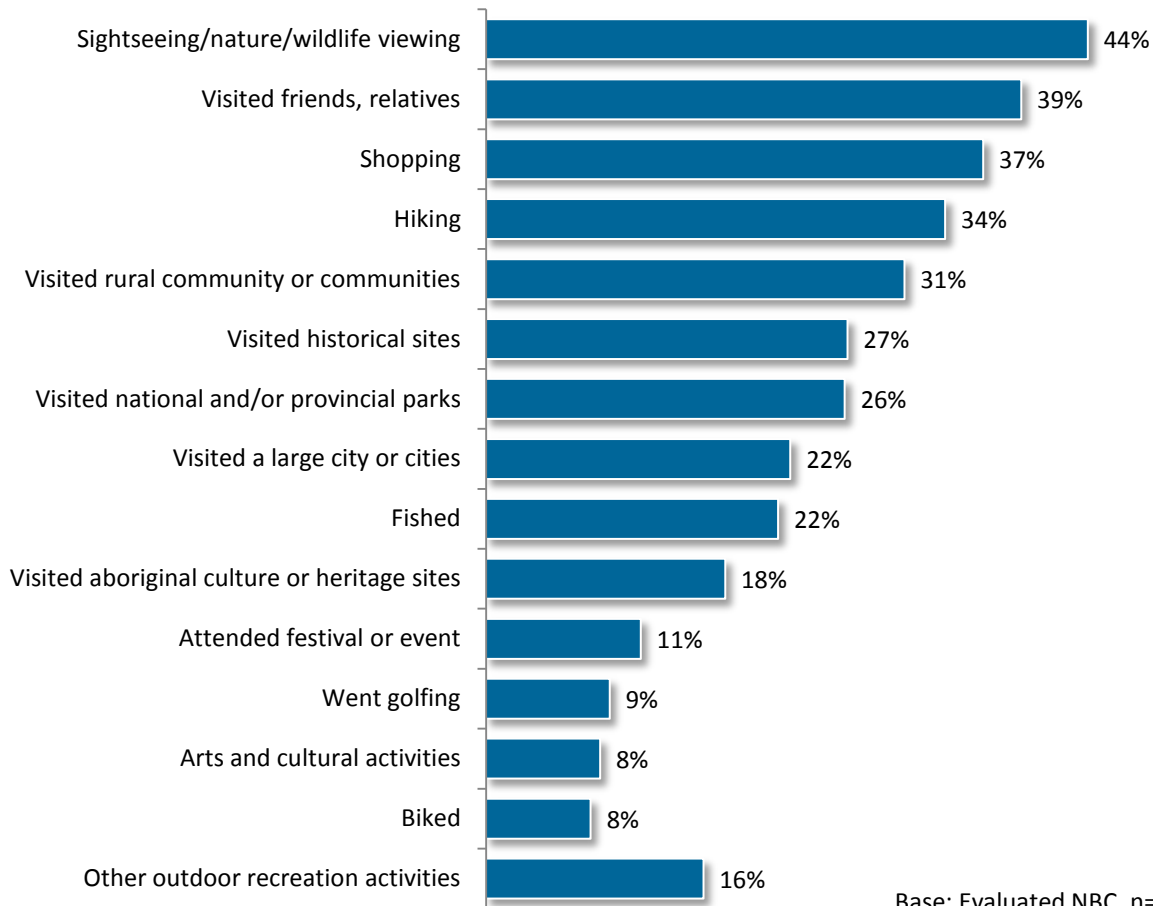
■ Very Familiar

■ Somewhat Familiar

Activities Participated In – Northern BC

- Visitors to Northern BC destinations were most likely to have participated in sightseeing, nature, wildlife viewing, visiting friends and relatives, shopping and hiking. Other key activities included visiting rural communities, visiting historical sites and visiting national/provincial parks.

Top Activities Participated In – Northern BC



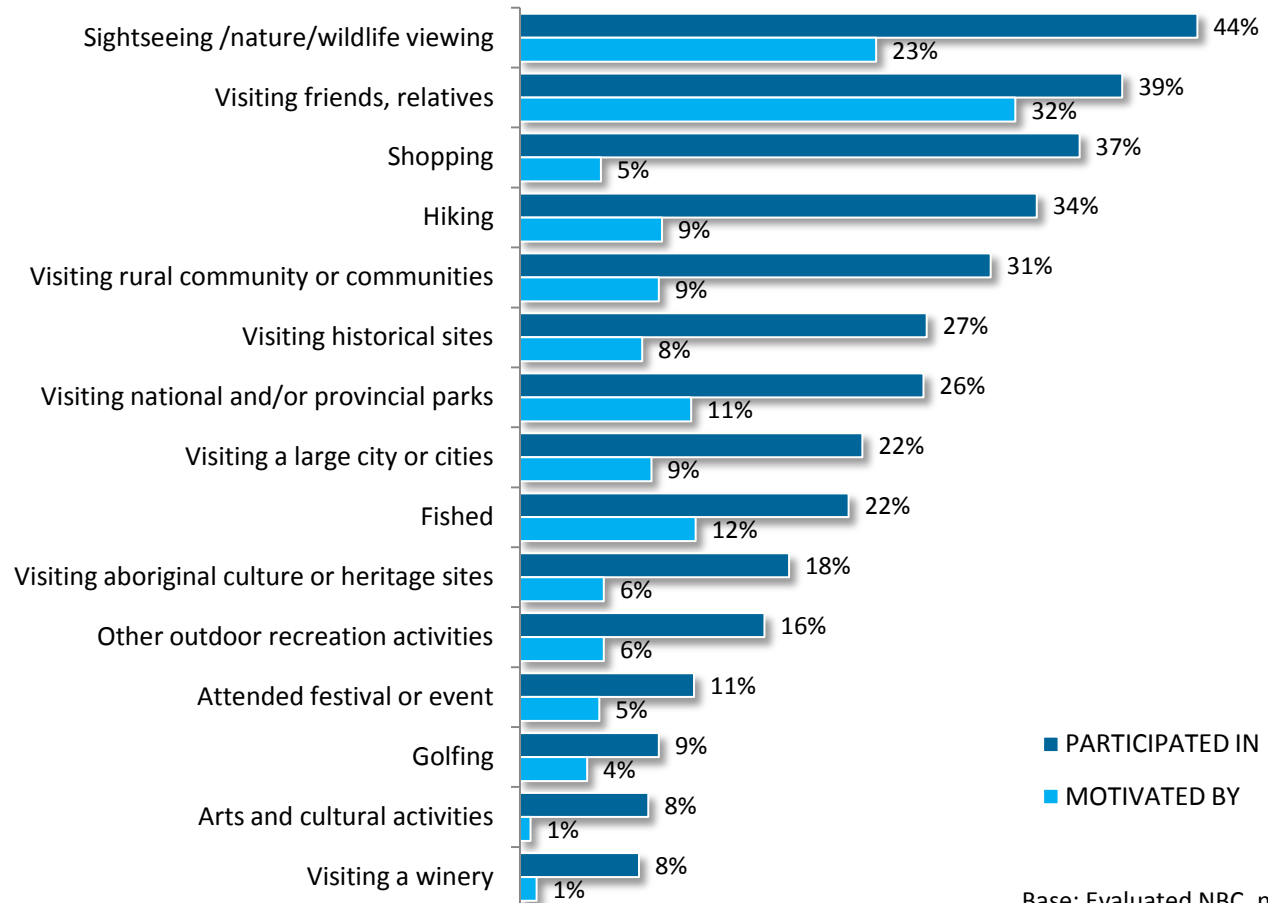
Base: Evaluated NBC, n=536.



Motivating vs. Participating – Northern BC

- Visitors to destinations in Northern BC participated in a far greater range of activities while on their trip than they were originally motivated by. Visiting friends and relatives was the key motivator, followed by sightseeing, nature, wildlife viewing, fishing and visiting national or provincial parks.
- Those activities with the largest gap in motivation vs. participation offer the largest opportunities to differentiate from competing destinations.

Motivating vs. Participating Activities



Base: Evaluated NBC, n=536.

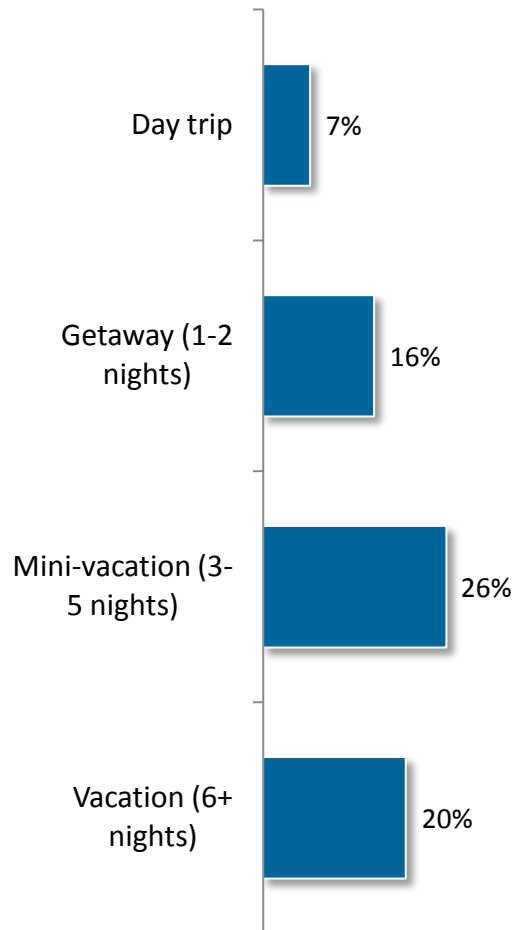




Future Trips to Northern BC

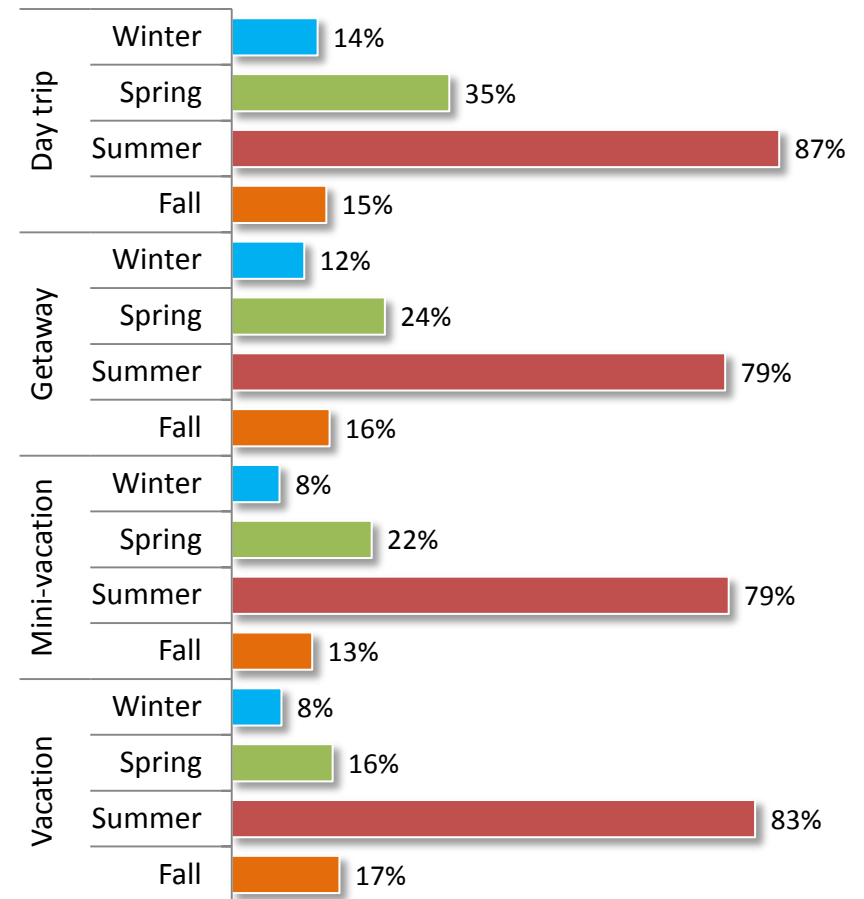
- One-quarter of respondents who evaluated Northern BC are likely to take a 'Mini-vacation' to that region in the next two years, while one-fifth are likely to take a 'vacation'.
- The majority of future trips to Northern BC are planned for summer. Shorter trips are more likely to be taken in spring.

Likelihood to Take Different Trip Durations (% top 2 box)



Base: Evaluated NBC, n=536.

Season of Trip by Trip Type



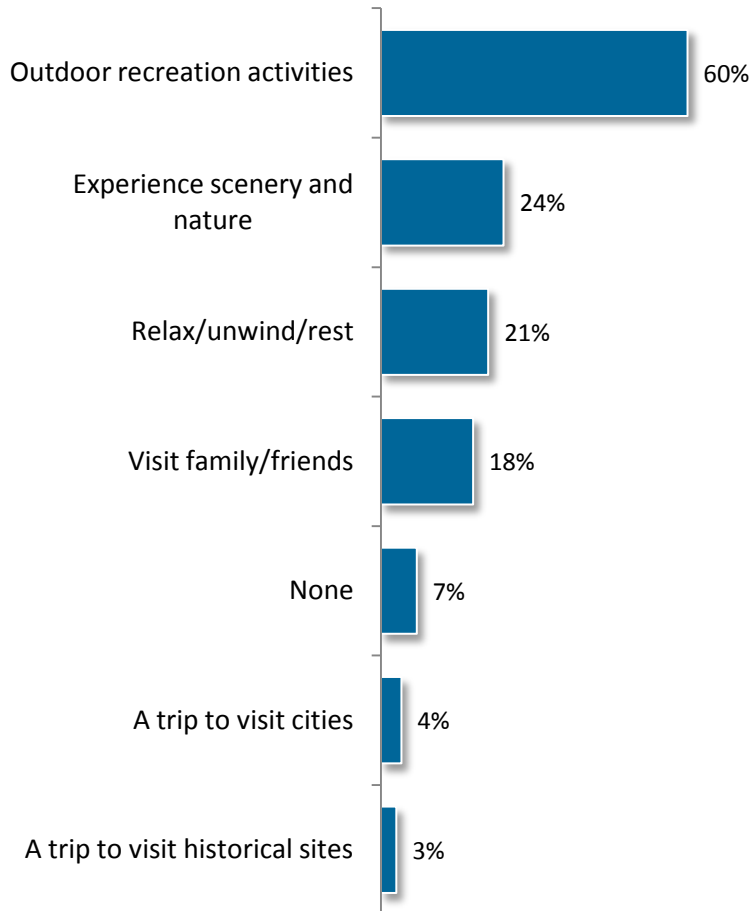
Base: Likely to take trip. Day, n=36, Getaway, n=84, Mini V, n=138, Vacation, n=107.



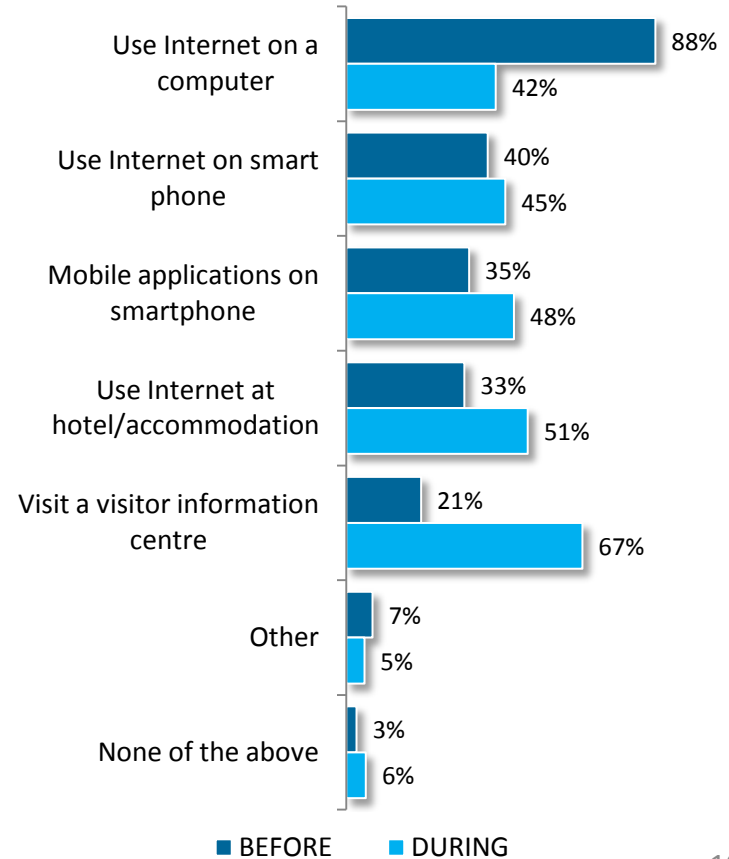
Future Trips to Northern BC

- Outdoor recreation activities are the primary motivator for future trips to Northern BC, as mentioned by six-in-ten of those likely to take a trip in the next 2 years. This is followed by a trip to experience scenery and nature and to relax and unwind.
- The Internet (accessed on a computer) is the key pre-trip information source, while visitor centres, Internet at accommodations and Internet on mobile devices would be used for information during future trips.

Main Activities for future trips



Trip Planning Tools



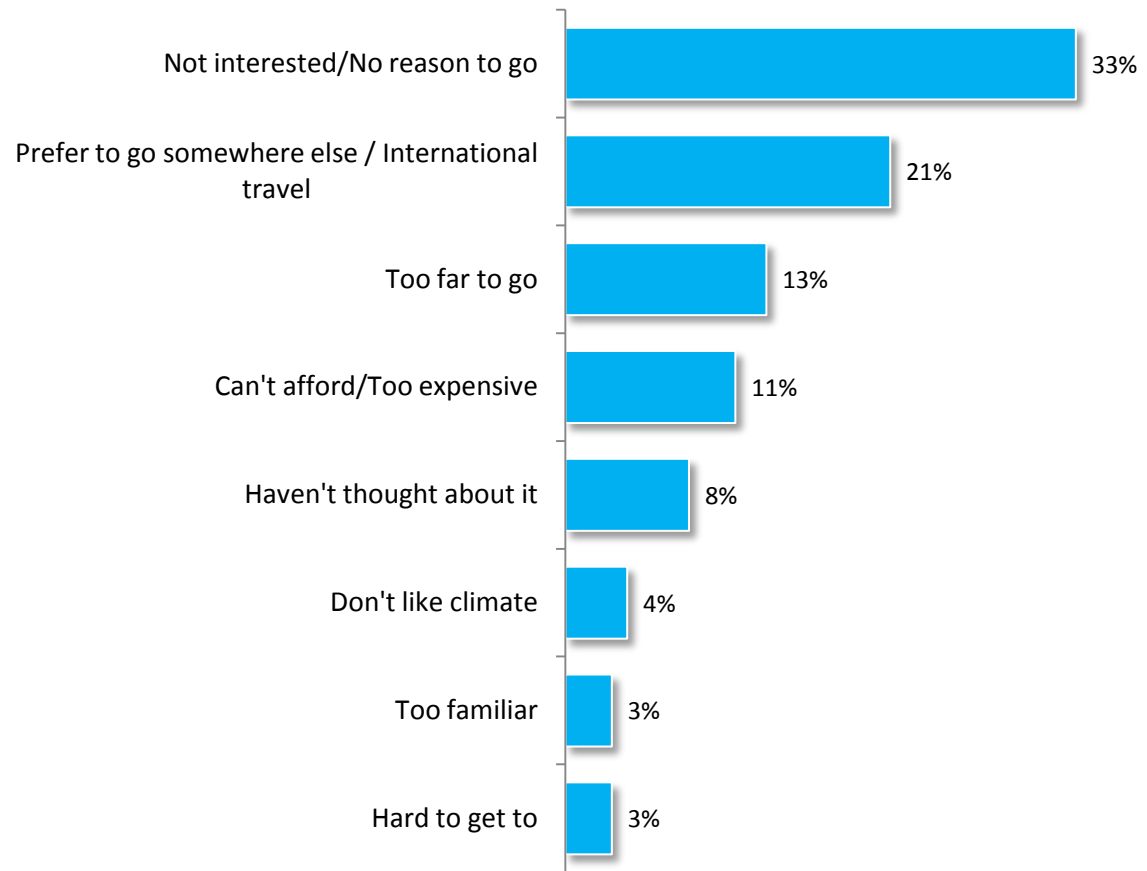
Base (Both charts): Likely to take a trip to NBC, n=202.

Reasons for being unlikely to visit - NBC

- Those not likely to visit Northern BC in the next 2 years mentioned not being interested/no reason to go and preferring to go to a different/international destination as their main reasons, followed by the distance and the cost.



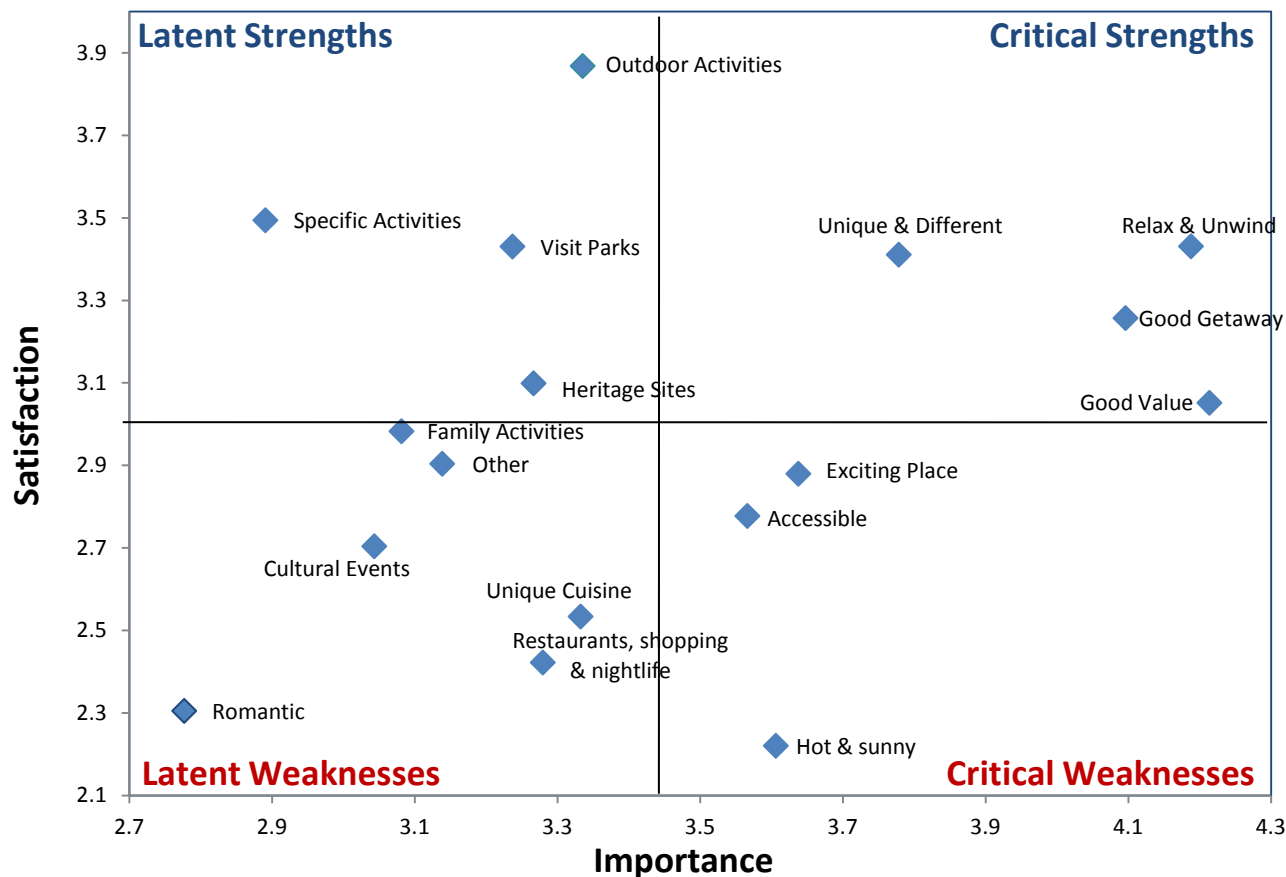
Reasons for being unlikely to visit





Factors Associated with NBC – Importance/Satisfaction Matrix

- The importance/satisfaction matrix divides attributes into four quadrants based on the average importance and satisfaction scores for each attribute. The axis of the matrix shows the overall average importance and satisfaction scores (out of 5) for all attributes.
- Being a place to relax and unwind, a good getaway and being unique and different and accessible are critical strengths for NBC. Good value is very important but receives an average satisfaction rating.
- Outdoor activities, specific activities, visit national/provincial parks, and heritage sites are latent strengths for the region.



Factors Associated with Northern BC



- Respondents from BC (both Lower Mainland and Other BC residents) associate the Northern BC region with heritage and historical sites, being exciting and having unique cuisine.
- For Albertan respondents, Northern BC is associated with offering a range of outdoor activities, family activities, an exciting place to be, romantic and with unique cuisine.
- Eastern Washington residents associate the region with similar factors as Albertans: Outdoor activities, unique cuisine, romantic and offering a specific activity.
- Specific associations are highlighted in the table below:

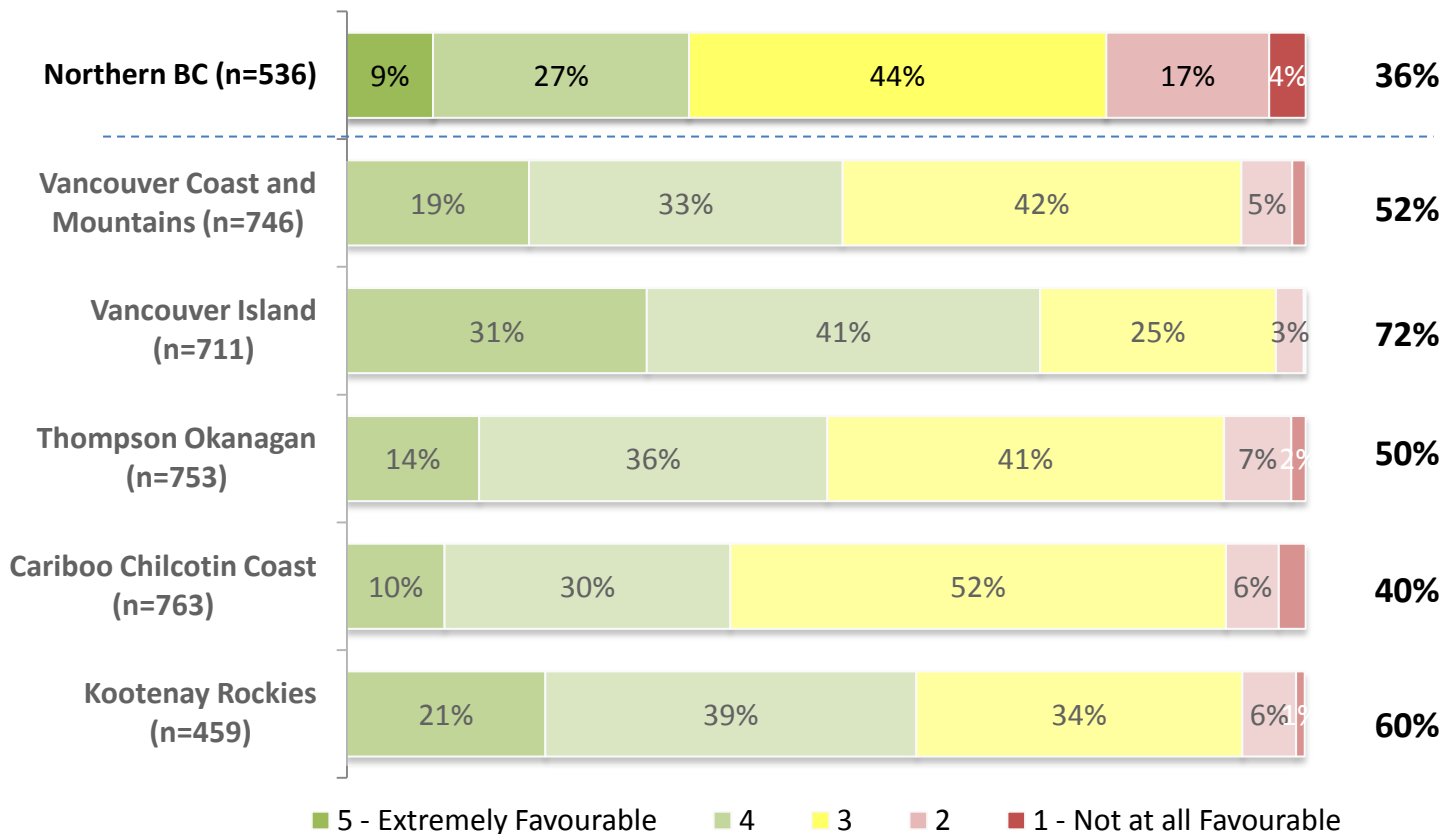
<p>Lower Mainland/ Other BC</p> <ul style="list-style-type: none"> • Heritage and Historical sites • An exciting place to be • Unique Cuisine 	<p>Calgary/ Edmonton/ Other Alberta</p> <ul style="list-style-type: none"> • Offers a range of outdoor activities • An exciting place to be • Offers family activities • Unique Cuisine • Romantic
<p>Eastern Washington</p> <ul style="list-style-type: none"> • Offers a range of outdoor activities • Unique Cuisine • Romantic • Offers a specific activity 	



Overall Impressions

- Just 36% of respondents who are familiar with Northern BC have a very favourable overall impression of the region.
- This region is rated the lowest in overall impressions of the six BC tourism regions.

Overall Impressions of BC Regions as Vacation Destinations **Top 2 Box**



* Main urban centres were omitted from the following regional evaluations:
VCM: Vancouver, Richmond & Whistler. **VI:** Victoria. **TOTA:** Kelowna & Kamloops.

Base: Evaluated Region.



Implications to Consider

- 'Other BC' and Lower Mainland residents offer the largest potential for tourism to NBC. They have both higher levels of familiarity and closer proximity to the region. The relatively lower levels of familiarity (and therefore favourability) in comparison to other BC regions is a key challenge for Northern BC.
- Build the Northern BC brand at a regional level before highlighting the various areas within the region.
- Leverage the association the region has with outdoor recreation activities, scenery and nature to encourage future trips, in particular for sightseeing, hiking, fishing and visiting parks. However this should be tempered with messaging around more passive, comfort-oriented, relaxing activities to ensure that the interests of the wider target market are not overlooked.
- Ensure promotional material also accommodates the interests of the 'North-to-Alaska' driving demographic.
- Highlight shoulder seasons and the available activities during shoulder seasons to grow visitation to the region. This will also help address the key reasons given by those unlikely to visit: not being interested and preferring a different destination.
- Consider using promotional material that targets the different associations the various target populations have with the region. For example, residents from BC are more likely to associate Northern BC with heritage and historical sites and an exciting place to be, while residents of Eastern Washington and Alberta are more likely to consider it a place which offers a range of outdoor activities.
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to NBC tend to have a few activities planned but make most decisions about what to participate in while on their trip, placing high importance on visitor centres and other information sourced during the visit.



Appendix:





Northern British Columbia:

Evaluations by Respondent Origin



Appendix - Regional Evaluations by Respondent Origin



- The tables on the following slides take a more in-depth review of the Northern British Columbia region.
- Responses have been tabulated based on the origin of the respondent who evaluated the region.
- The data in these tables uses the 'WT2' weighting scheme. That is, it accurately reflects the population of travellers from each of the markets profiled, based on region, gender and age.
- Cells that have been highlighted in either blue  (higher) or pink  (lower) represent a difference compared to at least one other region.
- Bases are not weighted. In a few instances, the base size is very low. As such, these results should be interpreted with caution. These cases have been highlighted with an asterisk.

Importance of Factors in Choosing a Destination Among those who have Visited NBC



Destination Attributes – Top 2 Box Importance	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Offers good value for money	85.9%	81.6%	86.6%		84.7%	85.7%
A place to relax and unwind	81.8%	81.3%	74.4%		83.7%	78.7%
Serves as a good getaway from everyday life	83.8%	75.6%	80.6%		76.6%	80.3%
Unique and different, feels quite different from home	66.9%	64.2%	63.4%		68.7%	65.5%
An exciting place to be	72.4%	61.3%	62.7%		37.5%	60.0%
Hot and sunny	62.9%	50.9%	56.7%		67.0%	60.1%
Accessible (Easy to get to)	57.0%	49.6%	53.1%		60.0%	55.3%
Offers wide range of outdoor activities	38.2%	34.8%	40.1%		48.8%	41.0%
Unique local cuisine	45.4%	36.0%	43.5%		52.5%	45.4%
Restaurants, shopping and nightlife	34.4%	56.1%	40.6%		44.4%	40.7%
Heritage and historical sites	33.1%	38.3%	36.8%		48.8%	38.4%
Opportunities to visit national, provincial or state parks	42.1%	34.5%	43.9%		43.6%	42.8%
Offers wide range of activities for the entire family	40.8%	34.3%	25.0%		52.1%	35.4%
Offers cultural events such as arts and music	30.1%	31.4%	38.3%		30.4%	34.0%
Romantic	32.4%	30.4%	29.3%		43.3%	33.1%
Offers a specific activity (like ski, golf, fishing etc.)	33.4%	19.0%	28.7%		34.5%	30.6%
Other	35.0%	37.4%	27.4%		29.1%	31.3%
UNWEIGHTED BASE:	69	78	84		65	296

Activities Participated In – NBC by Origin



Activities Participated In	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	44.2%	41.1%	39.9%		56.6%	44.3%
Shopping	40.5%	39.6%	25.4%		52.9%	36.6%
Hiking	31.5%	28.5%	30.6%		49.2%	33.8%
Visiting friends, relatives	41.4%	57.9%	42.9%		17.2%	39.4%
Visiting national and/or provincial parks	31.0%	24.4%	20.0%		32.5%	26.4%
Visiting rural community or communities	33.8%	31.9%	27.4%		31.4%	30.8%
Visiting historical sites	21.6%	21.4%	26.2%		41.4%	26.6%
Visiting a large city or cities	26.8%	17.4%	15.9%		30.7%	22.4%
Other outdoor recreation activities	15.5%	21.6%	11.9%		24.0%	16.0%
Fishing	20.0%	27.0%	20.7%		23.4%	21.5%
Visiting a winery	7.4%	0.6%	6.3%		15.9%	7.8%
Arts and cultural activities	12.9%	7.3%	3.3%		11.5%	8.4%
Participated in water sports	3.9%	7.0%	4.4%		6.1%	4.7%
Attended festival or event	9.8%	11.3%	13.0%		11.2%	11.4%
Visited aboriginal culture or heritage sites	24.4%	16.6%	8.5%		25.2%	17.6%
Biking	9.7%	6.2%	4.7%		11.2%	7.7%
Golf	11.1%	10.3%	10.6%		0.7%	9.1%
Whale watching	4.4%	2.9%	2.7%		17.0%	5.6%
Watching sporting events	4.4%	6.3%	4.7%		9.6%	5.5%
Skiing or snowboarding	2.4%	4.9%	5.3%		14.3%	5.7%
Participated in sporting events	5.4%	4.4%	3.5%		0.7%	3.8%
None of the above	6.8%	7.8%	0.0%		0.0%	3.1%
UNWEIGHTED BASE:	131	147	103		77	458

Activities Which Motivated Trips – NBC by Origin



Motivating Activities	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	26.3%	17.3%	13.1%		44.1%	23.3%
Shopping	5.8%	5.8%	2.2%		11.7%	5.3%
Hiking	8.1%	9.5%	8.6%		13.4%	9.3%
Visiting friends, relatives	31.5%	52.4%	37.8%		10.6%	32.4%
Visiting national and/or provincial parks	12.4%	6.1%	8.5%		17.8%	11.2%
Visiting rural community or communities	9.3%	8.0%	8.8%		9.9%	9.1%
Visiting historical sites	8.0%	4.9%	8.4%		9.1%	8.0%
Visiting a large city or cities	5.0%	3.6%	8.5%		19.4%	8.6%
Other outdoor recreation activities	5.4%	9.1%	5.5%		4.1%	5.5%
Fishing	8.2%	15.8%	14.2%		10.0%	11.5%
Visiting a winery	1.0%	0.0%	1.0%		2.1%	1.1%
Arts and cultural activities	1.3%	0.6%	0.0%		1.2%	0.7%
Participated in water sports	0.0%	0.6%	0.0%		1.4%	0.3%
Attended festival or event	3.3%	3.0%	8.8%		1.9%	5.2%
Visited aboriginal culture or heritage sites	6.4%	5.0%	1.9%		12.2%	5.5%
Biking	4.1%	1.2%	0.5%		0.6%	1.9%
Golf	2.3%	1.1%	8.7%		0.7%	4.4%
Whale watching	3.8%	0.6%	0.7%		3.3%	2.2%
Watching sporting events	1.0%	1.3%	3.7%		2.8%	2.4%
Skiing or snowboarding	0.7%	0.6%	1.5%		8.9%	2.3%
Participated in sporting events	1.3%	0.5%	2.7%		0.0%	1.6%
None of the above	22.3%	22.0%	0.0%		0.0%	9.9%
UNWEIGHTED BASE:	131	147	103		77	458

Participation vs. Motivation – NBC by Origin

Participation Versus Motivation	Origin of Respondent										Total	
	Lower Mainland		Other BC		Alberta		West WA		East WA			
	P	M	P	M	P	M	P	M	P	M	P	M
Sightseeing/nature/wildlife viewing	44%	26%	41%	17%	40%	13%			57%	44%	44%	23%
Shopping	41%	6%	40%	6%	25%	2%			53%	12%	37%	5%
Hiking	32%	8%	29%	10%	31%	9%			49%	13%	34%	9%
Visiting friends, relatives	41%	32%	58%	52%	43%	38%			17%	11%	39%	32%
Visiting national and/or provincial parks	31%	12%	24%	6%	20%	9%			33%	18%	26%	11%
Visiting rural community or communities	34%	9%	32%	8%	27%	9%			31%	10%	31%	9%
Visiting historical sites	22%	8%	21%	5%	26%	8%			41%	9%	27%	8%
Visiting a large city or cities	27%	5%	17%	4%	16%	9%			31%	19%	22%	9%
Other outdoor recreation activities	16%	5%	22%	9%	12%	6%			24%	4%	16%	6%
Fishing	20%	8%	27%	16%	21%	14%			23%	10%	22%	12%
Visiting a winery	7%	1%	1%	0%	6%	1%			16%	2%	8%	1%
Arts and cultural activities	13%	1%	7%	1%	3%	0%			12%	1%	8%	1%
Participated in water sports	4%	0%	7%	1%	4%	0%			6%	1%	5%	0%
Attended festival or event	10%	3%	11%	3%	13%	9%			11%	2%	11%	5%
Visited aboriginal culture or heritage sites	24%	6%	17%	5%	9%	2%			25%	12%	18%	6%
Biking	10%	4%	6%	1%	5%	1%			11%	1%	8%	2%
Golf	11%	2%	10%	1%	11%	9%			1%	1%	9%	4%
Whale watching	4%	4%	3%	1%	3%	1%			17%	3%	6%	2%
Watching sporting events	4%	1%	6%	1%	5%	4%			10%	3%	6%	2%
Skiing or snowboarding	2%	1%	5%	1%	5%	2%			14%	9%	6%	2%
Participated in sporting events	5%	1%	4%	1%	4%	3%			1%	0%	4%	2%
None of the above	7%	22%	8%	22%	0%	0%			0%	0%	3%	10%
UNWEIGHTED BASE:	131		147		103				77		458	



Likelihood of taking a trip – NBC by Origin



Likelihood to take type of trip (% Probably/Definitely)	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Day trip	2.4%	14.7%	4.5%		14.5%	6.6%
Getaway (1-2 nights)	10.6%	16.0%	11.6%		30.6%	15.6%
Mini-vacation (3-5 nights)	17.6%	23.8%	23.7%		41.8%	25.8%
Vacation (6+ nights)	18.3%	21.3%	15.0%		32.2%	20.1%
UNWEIGHTED BASE:	165	164	160		150	639

Activities Motivating Future Trips – NBC by Origin



Main activities on future trips	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
A trip for outdoor recreation activities.	54.7%	48.8%	67.4%		58.8%	60.3%
A trip to experience scenery and nature	19.9%	21.0%	22.0%		30.8%	24.3%
A trip to relax/unwind/rest	13.7%	10.0%	20.5%		27.7%	20.5%
A trip to visit family/friends	24.7%	36.2%	22.1%		4.0%	17.9%
A trip to visit national and/or provincial parks	4.3%	0.0%	0.0%		3.0%	2.0%
A trip to experience restaurants and night life	1.5%	1.4%	0.0%		6.3%	2.5%
A skiing or snowboarding trip	1.7%	2.6%	0.0%		4.3%	2.0%
A trip to visit historical sites	5.8%	0.0%	0.0%		3.7%	2.6%
A trip to visit cities	2.5%	6.8%	1.6%		7.6%	4.1%
A trip to see arts and cultural activities	1.5%	2.4%	2.5%		2.6%	2.3%
A romantic getaway	1.5%	0.0%	0.0%		0.0%	0.4%
A trip to experience aboriginal culture and heritage	1.5%	1.2%	0.0%		0.6%	0.6%
A trip to experience multi-cultural life	0.0%	0.0%	0.0%		0.0%	0.0%
Other	1.6%	1.2%	0.0%		0.0%	0.5%
None	3.2%	1.2%	0.0%		17.7%	6.6%
UNWEIGHTED BASE:	60	71	60		81	272

Reasons for Being Unlikely to Visit – NBC by Origin



Reasons for being unlikely to visit	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Not interested/No reason to go	42.9%	26.7%	29.2%		28.0%	33.4%
Prefer to go somewhere else / International travel	15.2%	26.3%	27.0%		13.3%	21.0%
Can't afford/Too expensive	9.9%	9.2%	8.4%		22.4%	11.0%
Too far to go	10.3%	17.6%	12.4%		18.7%	12.9%
Don't like climate	6.7%	3.7%	2.4%		6.2%	4.4%
Don't have the time	2.1%	4.6%	1.9%		2.1%	2.1%
Too familiar	2.0%	3.3%	2.9%		2.8%	2.6%
Border/passport hassle	0.0%	0.0%	0.0%		5.1%	0.8%
Haven't thought about it	0.0%	0.0%	17.4%		0.7%	8.2%
Hard to get to	2.7%	0.9%	2.9%		1.5%	2.5%
Health issues	2.1%	2.7%	1.3%		1.1%	1.6%
Already live there	0.0%	8.0%	0.0%		0.0%	0.4%
Other	1.5%	1.8%	0.0%		0.0%	0.6%
Don't know	10.2%	3.7%	2.5%		10.6%	6.3%
UNWEIGHTED BASE:	105	93	100		69	367

Timing of Trip Planning – NBC by Origin



	Timing of trip planning – tools used	Origin of Respondent					Total
		Lower Mainland	Other BC	Alberta	West WA	East WA	
Before	Use Internet on a computer	82.8%	84.5%	93.3%		85.2%	87.6%
	Use Internet on smart phone	39.8%	31.0%	28.9%		54.8%	40.1%
	Use Internet at hotel/accommodation	32.1%	21.4%	32.2%		38.3%	33.4%
	Mobile applications on smartphone	42.0%	23.7%	18.3%		50.5%	34.8%
	Visit a visitor information centre	22.2%	13.4%	16.0%		27.9%	21.2%
	Other	9.5%	4.5%	10.3%		3.2%	7.4%
	None of the above	4.3%	15.5%	1.8%		0.4%	2.9%
During	Visit a visitor information centre	73.0%	51.2%	62.6%		70.3%	66.9%
	Use Internet at hotel/accommodation	49.2%	37.3%	52.1%		55.2%	51.4%
	Mobile applications on smartphone	31.0%	24.8%	49.9%		61.9%	47.5%
	Use Internet on smart phone	37.4%	32.1%	40.3%		58.7%	45.0%
	Use Internet on a computer	49.0%	33.9%	34.0%		48.6%	42.3%
	Other	7.2%	7.3%	6.5%		1.5%	5.1%
	None of the above	9.9%	20.3%	3.9%		1.0%	5.5%
UNWEIGHTED BASE:		60	71	60		81	272