



2012 In-Market Research Report



Cariboo Chilcotin Coast



TourismBC

enrg RESEARCH GROUP





Executive Summary

This report summarizes key highlights for the Cariboo Chilcotin Coast (CCC) 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.*
- *Williams Lake/Quesnel is the CCC region with the highest familiarity. Residents of 'Other BC' are the most familiar with this region, followed by Lower Mainland residents. The region is relatively unknown to residents of Alberta and Washington State.*
- *Key activities which motivated trips to CCC were visiting friends or relatives, sightseeing, nature, wildlife viewing and fishing.*
- *It therefore follows that visitors to CCC are most likely to participate in sightseeing, nature, wildlife viewing and hiking on their trip.*
- *Four-in-ten (38%) respondents are likely to visit the Cariboo Chilcotin Coast in the next two years, most likely for a 'getaway' (1-2 nights) or a 'mini-vacation' (3-5 nights) during the summer. Spring is also a relatively popular season to visit the region for daytrips, getaways and mini-vacations. Outdoor recreation activities are the primary motivator for future trips to the Cariboo Chilcotin Coast.*
- *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 the Cariboo Chilcotin Coast in the next two years.*
- *Four-in-ten (40%) respondents familiar with CCC have a positive overall impression of the region, which ranks it 5th out of the 6 British Columbia Tourism regions, ahead of NBC.*

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=763 evaluations conducted for the Cariboo Chilcotin Coast (CCC) 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.

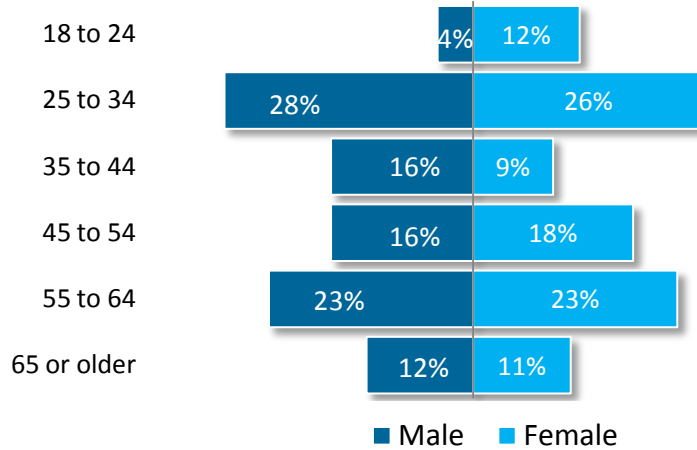




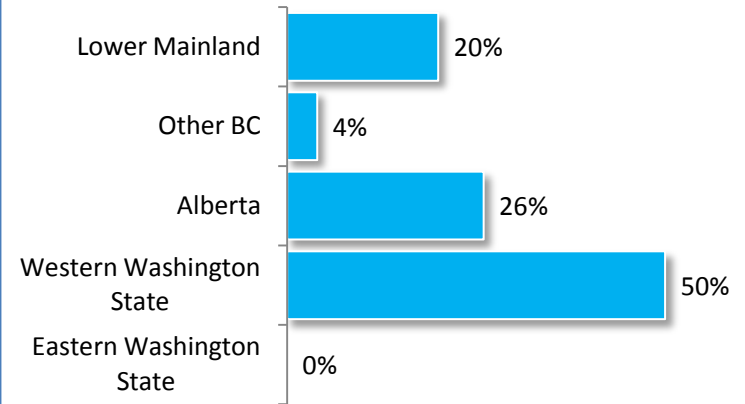
Respondent Characteristics - CCC

- Respondents who evaluated the Cariboo Chilcotin Coast (n=763) were slightly more likely to be male (54% vs. 46% female) and more likely to be in the 25 to 34 age bracket. The largest group were from Western Washington, followed by Alberta and the Lower Mainland of BC. They were mostly post-secondary educated and slightly skewed towards lower income levels.

Gender & Age

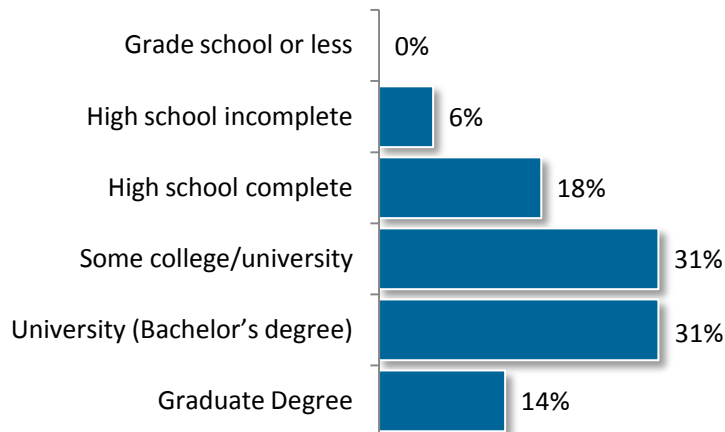


Respondent Origin

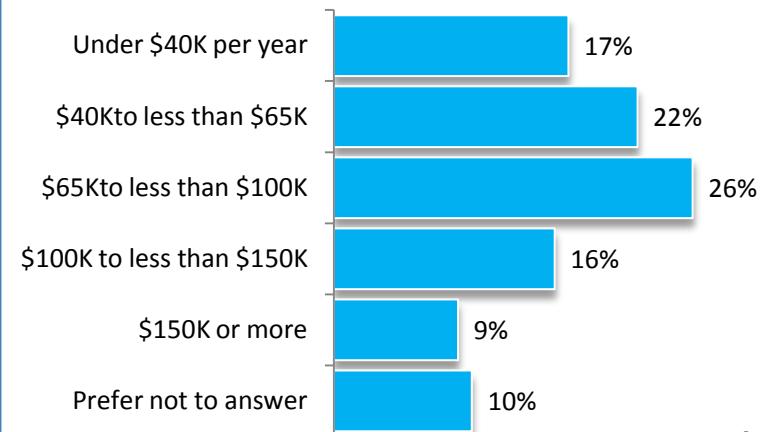


* Eastern Washington respondents did not evaluate CCC.

Education



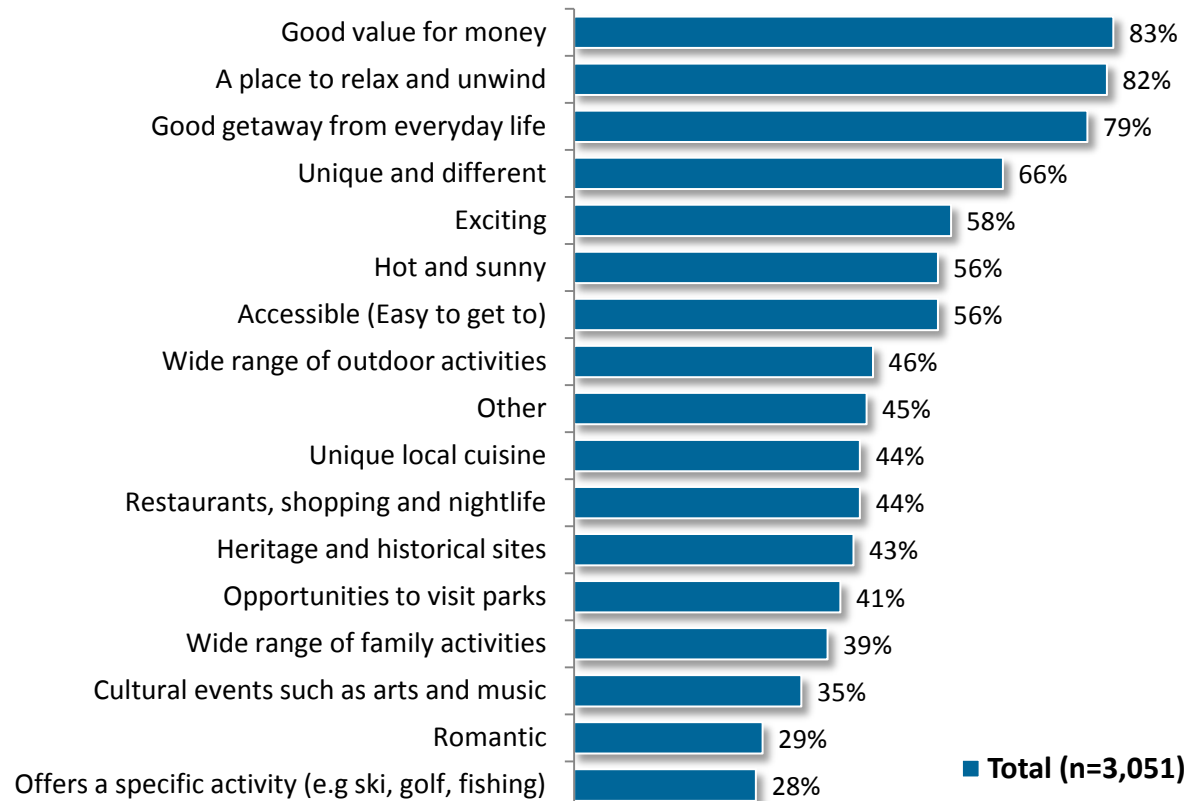
Household Income



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

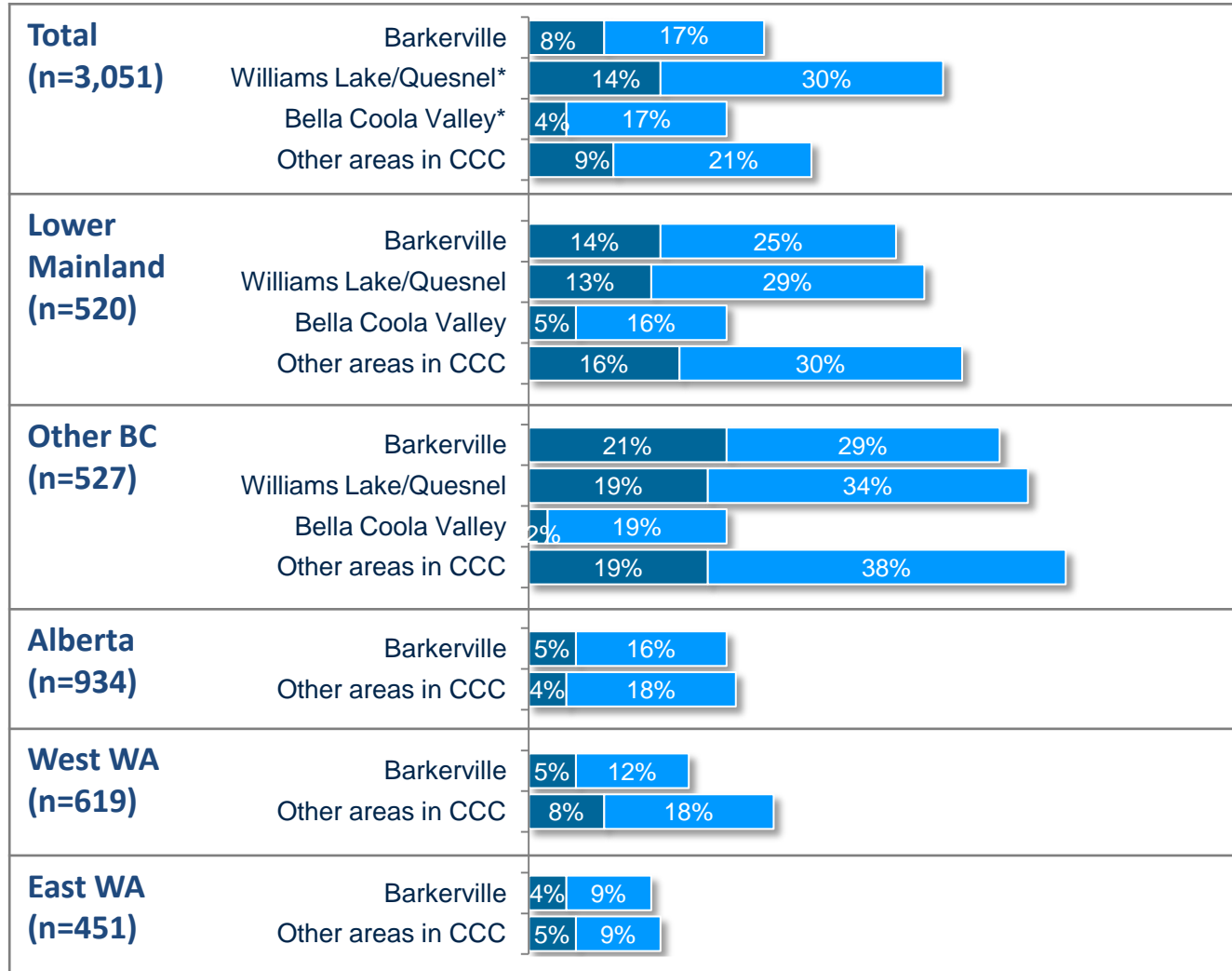


* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.



Familiarity with CCC – by Origin

- Among BC residents, Williams Lake/Quesnel and the Bella Coola Valley are the most well-known Cariboo Chilcotin Coast destinations. Relatively few Albertan or Washington State respondents were familiar with the region.



*Note: Only BC residents rated their familiarity with Williams Lake/Quesnel & the Bella Coola Valley.

■ Very Familiar

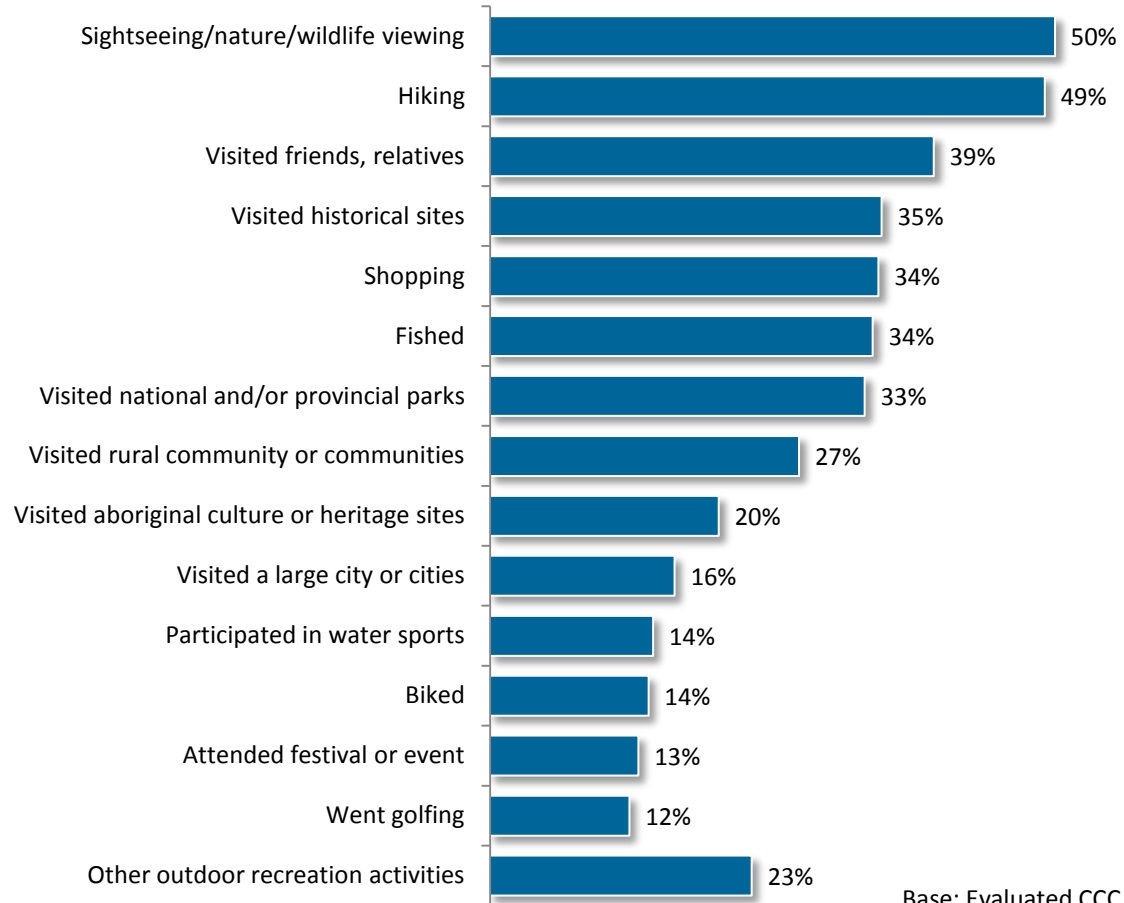
■ Somewhat Familiar



Activities Participated In - CCC

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

Top Activities Participated In - CCC



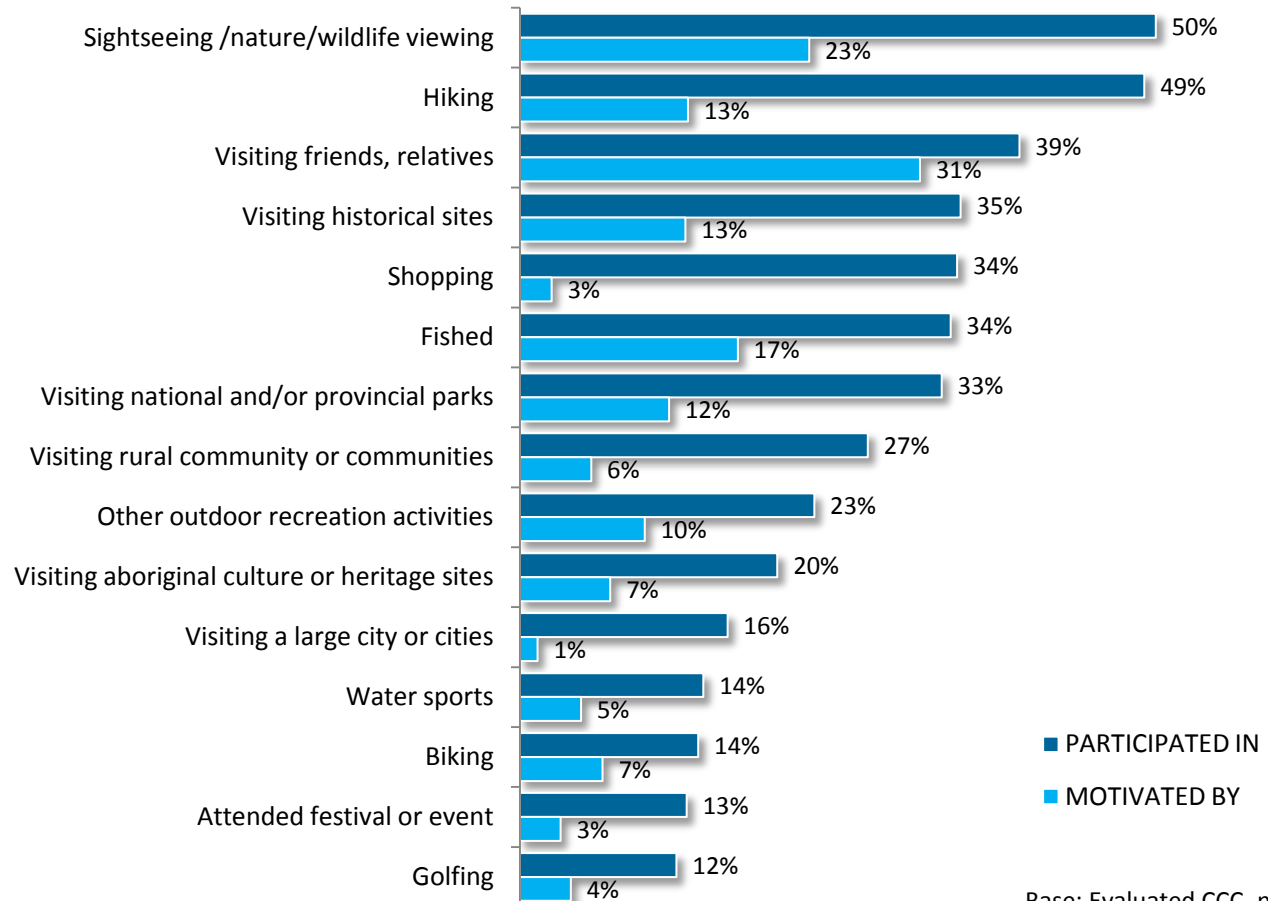
Base: Evaluated CCC, n=763.



Motivating vs. Participating - CCC

- Visitors to destinations in the Cariboo Chilcotin Coast participated in a far greater range of activities while on their trip than they were originally motivated by. Visiting friends and relatives, sightseeing, nature, wildlife viewing, fishing, hiking and visiting historical sites were the most common trip motivators.
- Those activities with the largest gap in motivation vs. participation offer the largest opportunities to differentiate from competing destinations.

Motivating vs. Participating Activities

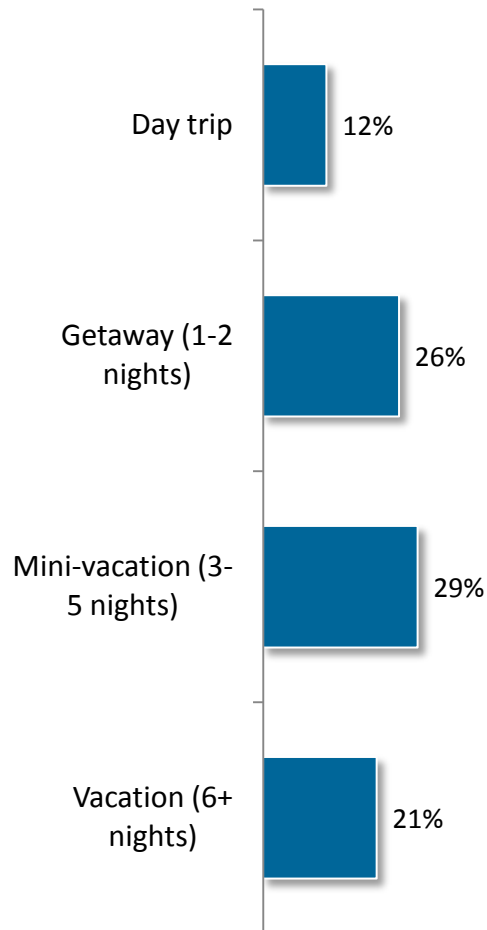


Base: Evaluated CCC, n=763.

Future Trips to the Cariboo Chilcotin Coast

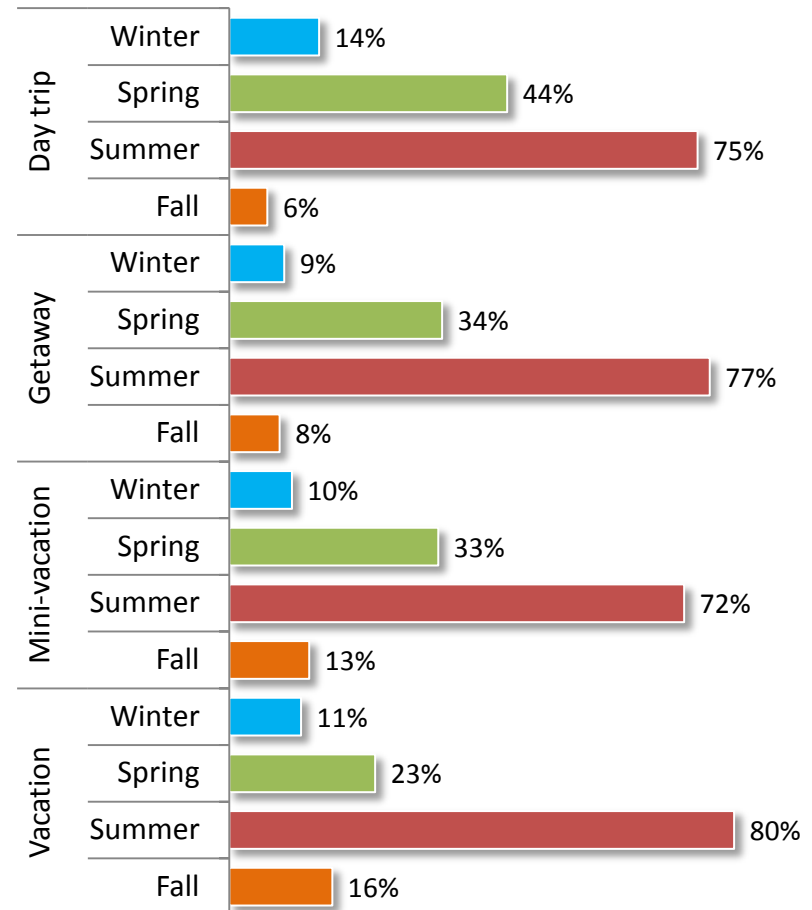
- Just under three-in-ten respondents who evaluated CCC are likely to take a 'Mini-vacation' to that region in the next two years, while 26% are likely to take a 'getaway', and 21% a vacation of 6 or more nights.
- Most future trips to CCC are planned for the summer, however spring is also a relatively popular season to visit for daytrips, getaways and mini-vacations.

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



Base: Evaluated CCC, n=763.

Season of Trip by Trip Type



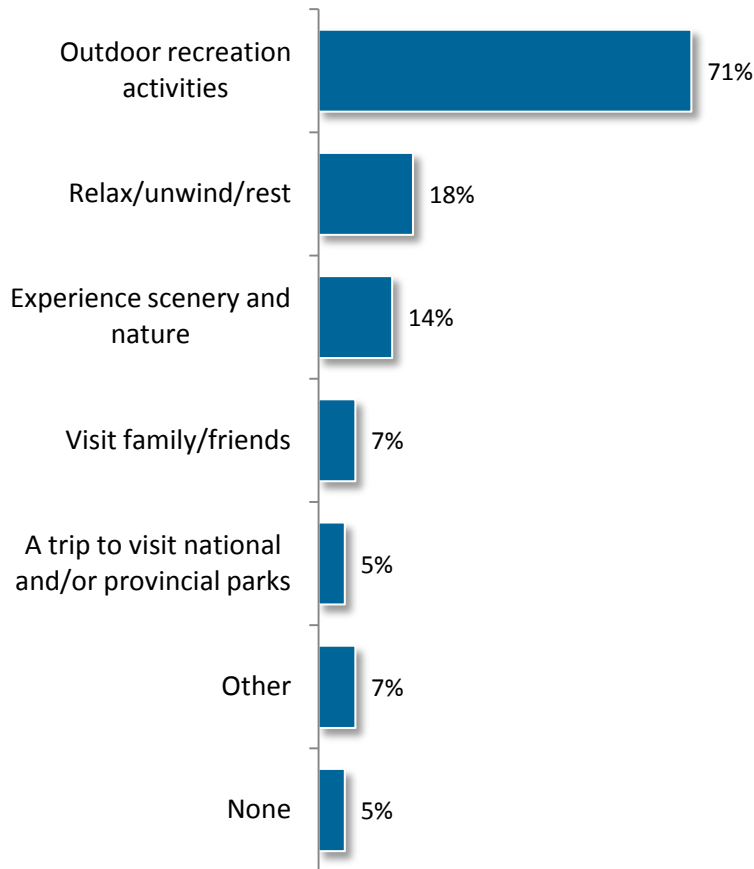
Base: Likely to take trip. Day, n=91, Getaway, n=195, Mini V, n=221, Vacation, n=162.



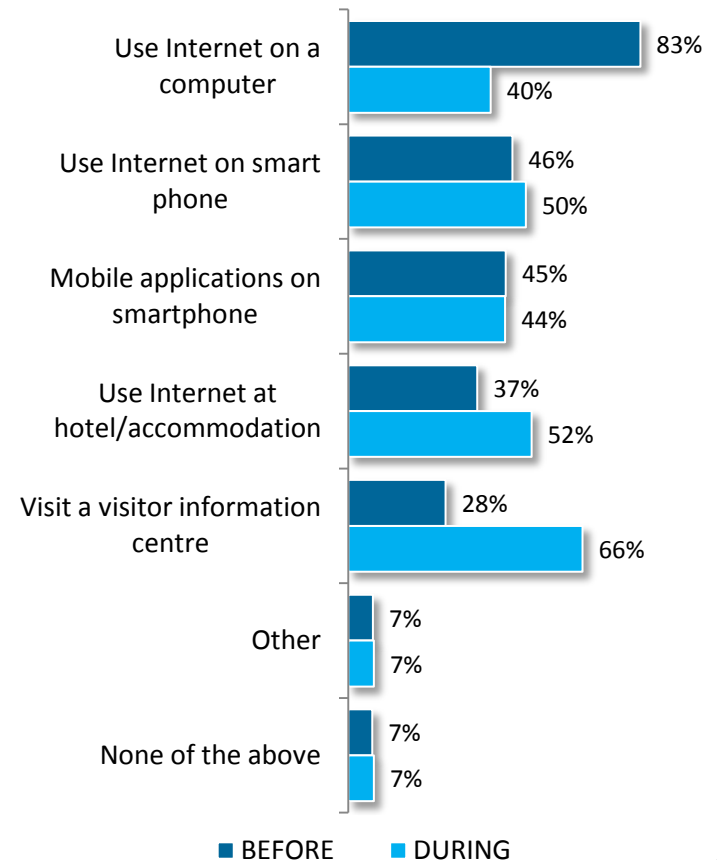
Future Trips to the Cariboo Chilcotin Coast

- Outdoor recreation activities are the primary motivator for trips to CCC, with over seven-in-ten mentioning this as a motivator. This is followed by a trip to relax and unwind and to experience scenery and nature.
- 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



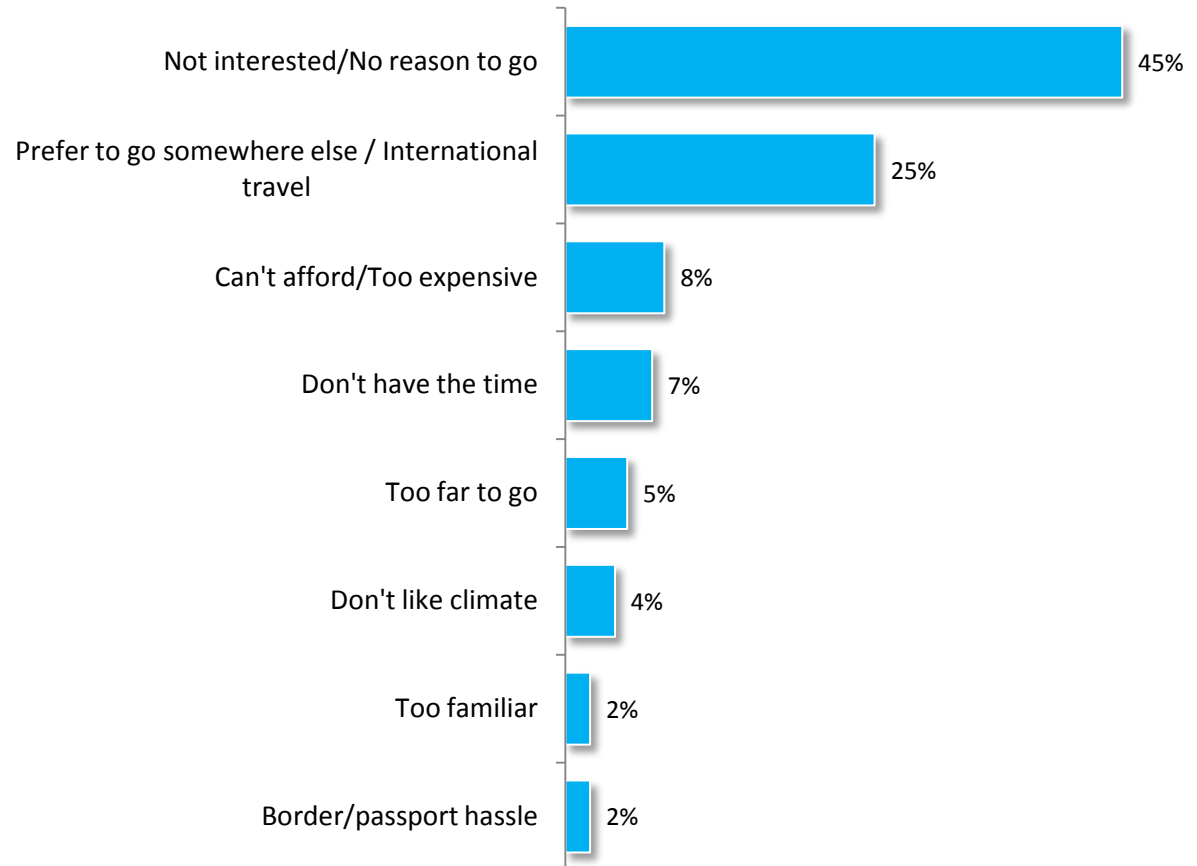
Base (Both charts): Likely to take a trip to CCC, n=378.

Reasons for being unlikely to visit - CCC

- Those not likely to visit the Cariboo Chilcotin Coast in the next 2 years cited not being interested/having no reason to go as their main reason, followed by preferring to go to a different/international destination (25%).



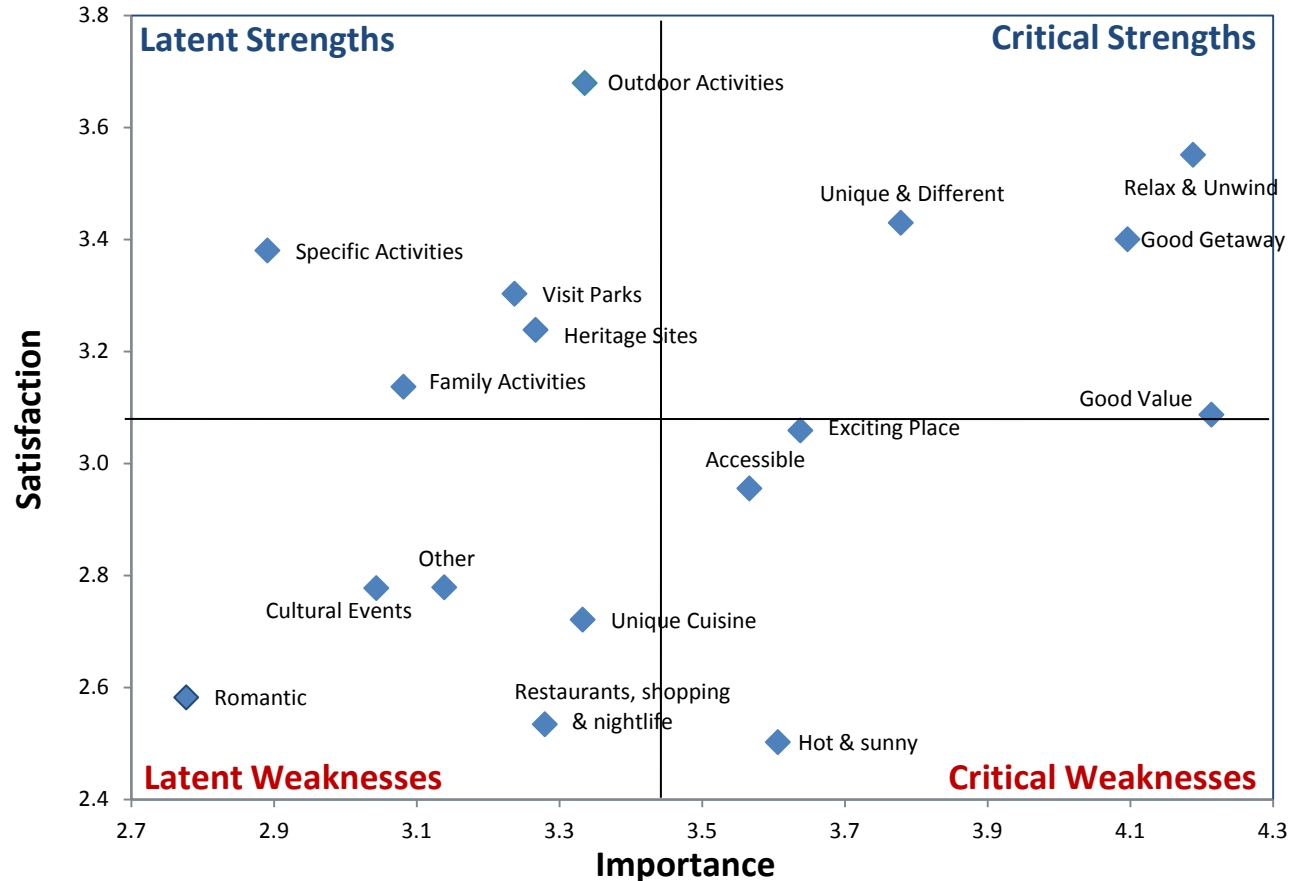
Reasons for being unlikely to visit





Factors Associated with CCC – 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 are critical strengths for CCC. Good value is very important but receives an average satisfaction rating.
- Outdoor activities, specific activities, visit national/provincial parks, heritage sites and family activities are latent strengths for the region.



Factors Associated with Cariboo Chilcotin Coast

- Respondents from BC (both Lower Mainland and Other BC residents) associate the Cariboo Chilcotin Coast region with having heritage and historical sites, for offering a specific activity and good value for money.
- Residents of Calgary, Edmonton and other Albertan regions also associate CCC with offering a specific activity, having heritage and historical sites and a range of outdoor activities.
- Greater Seattle residents are the most likely to consider CCC an exciting place to be that offers value for money, unique cuisine and is romantic.
- In contrast, other Western Washington residents are most likely to associate the region with offering a specific activity. The Cariboo Chilcotin Coast is also seen as being a place for historical sites that offers a range of outdoor activities in the eyes of these respondents.
- Specific associations are highlighted in the table below:

<p>Lower Mainland/ Other BC</p> <ul style="list-style-type: none"> • Heritage and Historical Sites • Offers a specific activity • Offers good value for money 	<p>Calgary/ Edmonton/ Other Alberta</p> <ul style="list-style-type: none"> • Offers a specific activity • Heritage and Historical Sites • Offers a range of outdoor activities
<p>Greater Seattle</p> <ul style="list-style-type: none"> • An exciting place to be • Restaurants, Shopping and Nightlife • Unique Cuisine • Romantic 	<p>Western Washington</p> <ul style="list-style-type: none"> • Offers a specific activity • Heritage and Historical Sites • Offers a range of outdoor activities

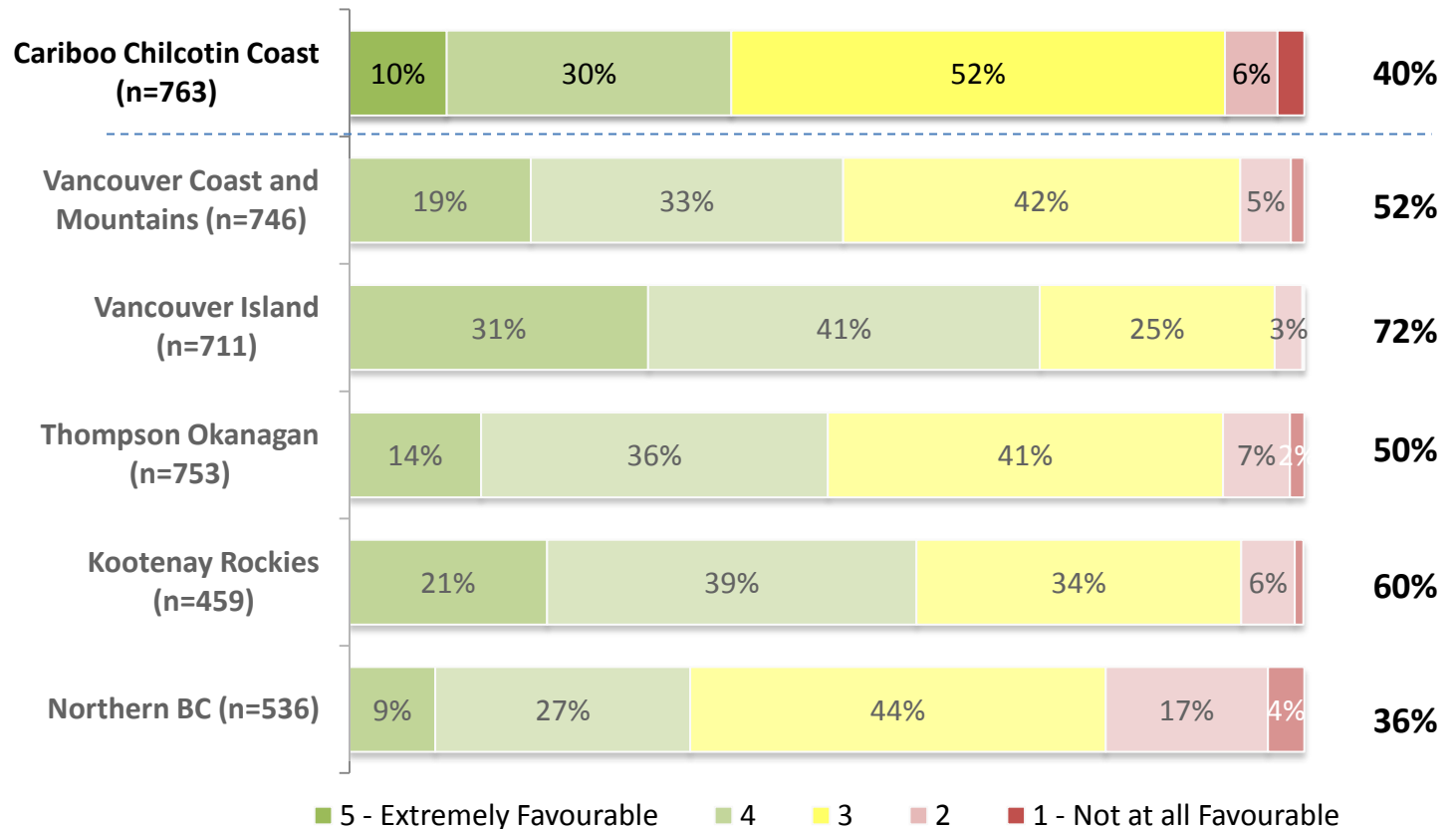




Overall Impressions

- Four-in-ten respondents which are familiar with the Cariboo Chilcotin Coast have a very favourable overall impression of the region.
- CCC is rated more positively than Northern BC, but falls behind in comparison to overall impressions of BC's other 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.



Implications to Consider

- 'Other BC' and Lower Mainland residents offer the largest potential for tourism. They have both higher levels of familiarity and closer proximity to the region. The relatively lower levels of familiarity (and by extension, favourability) in comparison to other BC regions is a key challenge for the Cariboo Chilcotin Coast.
- Build the CCC brand at a regional level before highlighting key features of the Coast, Cariboo and Chilcotin areas.
- Leverage the association the region has with outdoor recreation activities to encourage future trips, in particular for hiking, fishing and visiting parks. However, this should be tempered with messaging around more passive, comfort-oriented and relaxing activities to ensure that the interests of the wider target market are not overlooked.
- Ensure promotional materials also accommodate the interests of the 'North-to-Alaska' driving demographic.
- Highlight shoulder seasons and the wide variety of available activities during these times to grow visitation to the region, especially in fall. This will also help address the key reasons given by those unlikely to visit, namely not being interested or preferring a different destination.
- Consider using promotional material that focuses on the different associations the target populations have with the region. For example, respondents from the Lower Mainland and Other BC are more likely to associate the region with heritage and historical sites, specific activities and value for money than residents from Western Washington and Alberta.
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to the Cariboo Chilcotin Coast tend to have a few activities planned but make most decisions about what to participate in while on their trip, placing high importance on accessibility of visitor centres and other information sourced during the visit.



Appendix:





Cariboo, Chilcotin Coast:



Evaluations by Respondent Origin



Appendix - Regional Evaluations by Respondent Origin

- The tables on the following slides take a more in-depth review of the Cariboo, Chilcotin Coast 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 CCC



Destination Attributes – Top 2 Box Importance	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Offers good value for money	86.1%	77.5%	77.4%	72.0%		76.2%
A place to relax and unwind	71.5%	76.6%	83.7%	86.0%		82.6%
Serves as a good getaway from everyday life	66.1%	83.9%	72.1%	53.3%		62.6%
Unique and different, feels quite different from home	50.9%	68.9%	60.4%	50.4%		54.5%
An exciting place to be	59.5%	54.3%	56.7%	53.4%		55.5%
Hot and sunny	57.5%	57.9%	59.1%	48.4%		53.7%
Accessible (Easy to get to)	57.9%	55.8%	54.5%	59.7%		57.6%
Offers wide range of outdoor activities	33.2%	26.0%	50.3%	62.1%		52.4%
Unique local cuisine	32.3%	46.9%	27.3%	42.2%		35.9%
Restaurants, shopping and nightlife	36.2%	58.5%	49.0%	44.0%		45.0%
Heritage and historical sites	41.1%	44.6%	26.2%	56.5%		43.7%
Opportunities to visit national, provincial or state parks	33.9%	37.7%	42.1%	52.4%		45.6%
Offers wide range of activities for the entire family	26.9%	32.3%	29.2%	18.7%		24.0%
Offers cultural events such as arts and music	17.7%	36.6%	33.9%	32.4%		30.8%
Romantic	34.3%	36.6%	49.6%	45.3%		44.7%
Offers a specific activity (like ski, golf, fishing etc.)	22.0%	12.1%	17.2%	36.5%		27.0%
Other	25.6%	19.8%	53.5%	0.0%		15.7%
UNWEIGHTED BASE:	28*	34	44	24*		130

*Caution: Low base

Activities Participated In – CCC by Origin



Activities Participated In	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	46.2%	38.7%	66.7%	43.3%		49.9%
Shopping	32.3%	30.3%	25.7%	42.7%		34.3%
Hiking	41.9%	42.7%	38.5%	63.5%		49.0%
Visiting friends, relatives	48.9%	44.8%	42.8%	27.4%		39.2%
Visiting national and/or provincial parks	37.3%	30.3%	34.6%	28.8%		33.1%
Visiting rural community or communities	26.7%	30.1%	27.8%	27.1%		27.3%
Visiting historical sites	31.3%	42.5%	40.5%	32.1%		34.6%
Visiting a large city or cities	17.5%	12.6%	4.7%	24.0%		16.3%
Other outdoor recreation activities	25.2%	25.6%	17.1%	25.0%		23.1%
Fishing	24.0%	28.3%	27.8%	47.3%		33.8%
Visiting a winery	3.5%	1.8%	3.6%	10.3%		5.9%
Arts and cultural activities	5.0%	5.8%	13.1%	15.7%		11.1%
Participated in water sports	8.2%	7.5%	17.8%	18.5%		14.4%
Attended festival or event	11.3%	3.2%	6.1%	21.1%		13.1%
Visited aboriginal culture or heritage sites	11.1%	19.6%	25.5%	24.3%		20.2%
Biking	9.6%	12.7%	6.5%	23.3%		14.0%
Golf	15.1%	17.8%	10.5%	10.3%		12.3%
Whale watching	0.0%	3.8%	15.7%	10.4%		8.1%
Watching sporting events	6.8%	3.9%	2.7%	22.7%		11.4%
Skiing or snowboarding	2.5%	2.0%	1.3%	0.0%		1.2%
Participated in sporting events	2.7%	0.0%	3.0%	4.0%		3.1%
None of the above	0.8%	5.6%	0.0%	0.0%		0.6%
UNWEIGHTED BASE:	94	91	64	44		293

Activities Which Motivated Trips – CCC by Origin



Motivating Activities	Origin of Respondent					Total
	Lower Mainland	Other BC	Alberta	West WA	East WA	
Sightseeing/nature/wildlife viewing	16.1%	17.8%	34.2%	21.2%		22.7%
Shopping	3.1%	6.2%	4.7%	0.0%		2.5%
Hiking	7.9%	12.4%	18.7%	14.1%		13.2%
Visiting friends, relatives	42.5%	35.5%	33.7%	19.7%		31.4%
Visiting national and/or provincial parks	12.7%	8.6%	15.6%	8.6%		11.7%
Visiting rural community or communities	6.1%	5.6%	4.8%	5.7%		5.6%
Visiting historical sites	15.5%	10.6%	22.8%	4.3%		13.0%
Visiting a large city or cities	1.7%	0.9%	0.0%	2.3%		1.4%
Other outdoor recreation activities	8.7%	13.5%	10.6%	9.6%		9.8%
Fishing	15.9%	11.5%	18.6%	18.0%		17.1%
Visiting a winery	0.0%	0.0%	1.4%	2.3%		1.2%
Arts and cultural activities	0.0%	2.9%	5.1%	8.0%		4.5%
Participated in water sports	1.6%	1.9%	4.3%	8.6%		4.8%
Attended festival or event	2.1%	1.1%	3.9%	4.0%		3.2%
Visited aboriginal culture or heritage sites	5.3%	10.8%	7.3%	8.0%		7.1%
Biking	1.8%	3.7%	3.0%	13.5%		6.5%
Golf	9.0%	8.9%	2.5%	0.0%		4.0%
Whale watching	0.0%	0.0%	6.6%	0.0%		1.7%
Watching sporting events	0.0%	0.9%	0.9%	15.5%		6.0%
Skiing or snowboarding	0.0%	1.1%	1.3%	0.0%		0.4%
Participated in sporting events	0.0%	0.0%	1.7%	0.0%		0.4%
None of the above	6.6%	24.7%	0.0%	0.0%		3.6%
UNWEIGHTED BASE:	94	91	64	44		293

Participation vs. Motivation – CCC 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	46%	16%	39%	18%	67%	34%	43%	21%			50%	23%
Shopping	32%	3%	30%	6%	26%	5%	43%	0%			34%	3%
Hiking	42%	8%	43%	12%	39%	19%	64%	14%			49%	13%
Visiting friends, relatives	49%	43%	45%	36%	43%	34%	27%	20%			39%	31%
Visiting national and/or provincial parks	37%	13%	30%	9%	35%	16%	29%	9%			33%	12%
Visiting rural community or communities	27%	6%	30%	6%	28%	5%	27%	6%			27%	6%
Visiting historical sites	31%	16%	43%	11%	41%	23%	32%	4%			35%	13%
Visiting a large city or cities	18%	2%	13%	1%	5%	0%	24%	2%			16%	1%
Other outdoor recreation activities	25%	9%	26%	14%	17%	11%	25%	10%			23%	10%
Fishing	24%	16%	28%	12%	28%	19%	47%	18%			34%	17%
Visiting a winery	4%	0%	2%	0%	4%	1%	10%	2%			6%	1%
Arts and cultural activities	5%	0%	6%	3%	13%	5%	16%	8%			11%	5%
Participated in water sports	8%	2%	8%	2%	18%	4%	19%	9%			14%	5%
Attended festival or event	11%	2%	3%	1%	6%	4%	21%	4%			13%	3%
Visited aboriginal culture or heritage sites	11%	5%	20%	11%	26%	7%	24%	8%			20%	7%
Biking	10%	2%	13%	4%	7%	3%	23%	14%			14%	7%
Golf	15%	9%	18%	9%	11%	3%	10%	0%			12%	4%
Whale watching	0%	0%	4%	0%	16%	7%	10%	0%			8%	2%
Watching sporting events	7%	0%	4%	1%	3%	1%	23%	16%			11%	6%
Skiing or snowboarding	3%	0%	2%	1%	1%	1%	0%	0%			1%	0%
Participated in sporting events	3%	0%	0%	0%	3%	2%	4%	0%			3%	0%
None of the above	1%	7%	6%	25%	0%	0%	0%	0%			1%	4%
UNWEIGHTED BASE:	94		91		64		44				293	



Likelihood of taking a trip – CCC 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	12.0%	11.1%	10.6%	12.6%		11.9%
Getaway (1-2 nights)	25.3%	15.2%	12.4%	33.3%		25.5%
Mini-vacation (3-5 nights)	34.4%	33.6%	19.0%	31.8%		29.0%
Vacation (6+ nights)	22.0%	13.9%	21.8%	21.4%		21.3%
UNWEIGHTED BASE:	157	159	152	150		618

Activities Motivating Future Trips – CCC 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.	64.1%	61.9%	78.4%	72.5%		71.4%
A trip to experience scenery and nature	17.3%	15.8%	14.4%	13.1%		14.3%
A trip to relax/unwind/rest	24.1%	16.3%	7.9%	19.7%		18.4%
A trip to visit family/friends	12.3%	16.7%	11.9%	2.3%		6.6%
A trip to visit national and/or provincial parks	1.0%	1.2%	5.3%	7.0%		5.2%
A trip to experience restaurants and night life	0.0%	1.2%	0.0%	0.0%		0.0%
A skiing or snowboarding trip	1.9%	0.0%	0.0%	3.5%		2.4%
A trip to visit historical sites	0.9%	2.6%	2.3%	0.0%		0.7%
A trip to visit cities	4.1%	13.7%	8.3%	0.0%		2.8%
A trip to see arts and cultural activities	3.5%	9.8%	1.0%	0.0%		1.3%
A romantic getaway	1.0%	1.2%	0.0%	1.9%		1.4%
A trip to experience aboriginal culture and heritage	1.0%	7.5%	1.5%	0.0%		0.7%
A trip to experience multi-cultural life	0.6%	0.0%	0.0%	0.0%		0.1%
Other	3.4%	4.4%	1.5%	9.3%		6.6%
None	8.9%	3.8%	7.8%	2.5%		4.8%
UNWEIGHTED BASE:	86	66	46	67		265

Reasons for Being Unlikely to Visit – CCC 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	55.1%	46.6%	47.0%	38.0%		44.7%
Prefer to go somewhere else / International travel	20.8%	20.4%	31.2%	23.0%		25.3%
Can't afford/Too expensive	3.1%	10.3%	1.7%	14.8%		7.8%
Too far to go	4.4%	9.7%	6.2%	4.0%		5.1%
Don't like climate	4.8%	0.8%	4.3%	3.4%		3.9%
Don't have the time	0.0%	5.8%	8.0%	8.2%		6.5%
Too familiar	2.6%	2.9%	4.0%	0.4%		2.2%
Border/passport hassle	0.0%	0.0%	0.0%	4.5%		1.9%
Haven't thought about it	0.0%	0.0%	0.0%	1.0%		0.4%
Hard to get to	0.0%	0.0%	0.0%	0.0%		0.0%
Health issues	0.0%	0.9%	0.0%	0.9%		0.4%
Already live there	0.0%	1.8%	0.9%	1.5%		1.0%
Other	2.8%	1.7%	0.0%	1.9%		1.4%
Don't know	10.5%	3.9%	6.7%	8.5%		8.0%
UNWEIGHTED BASE:	71	93	106	83		353

Timing of Trip Planning – CCC 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	84.7%	90.8%	77.7%	83.1%		82.7%
	Use Internet on smart phone	29.2%	39.3%	38.4%	55.4%		46.4%
	Use Internet at hotel/accommodation	24.1%	22.1%	54.9%	36.4%		36.5%
	Mobile applications on smartphone	20.3%	21.1%	49.3%	53.4%		44.6%
	Visit a visitor information centre	32.9%	19.7%	44.2%	21.2%		27.6%
	Other	8.1%	5.7%	4.4%	7.4%		7.0%
	None of the above	6.7%	5.5%	3.5%	7.8%		6.8%
During	Visit a visitor information centre	71.8%	64.2%	73.4%	62.5%		66.4%
	Use Internet at hotel/accommodation	57.2%	40.4%	31.6%	56.8%		51.9%
	Mobile applications on smartphone	35.3%	35.7%	45.2%	48.0%		44.4%
	Use Internet on smart phone	33.9%	30.4%	41.2%	60.1%		50.3%
	Use Internet on a computer	24.8%	40.5%	52.6%	42.2%		40.3%
	Other	6.3%	8.4%	11.2%	6.3%		7.2%
	None of the above	7.2%	8.9%	1.6%	8.8%		7.2%
	UNWEIGHTED BASE:	86	66	46	67		265