Community Tourism Foundations Perceptions/Incidence Study

Alberta (Calgary & Edmonton)
Top Line Market Report

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Tourism BC

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Executive Summary

R.A. Malatest & Associates Ltd. was commissioned by Tourism BC to conduct the *Community Tourism Foundations Perceptions/Incidence Study* survey in the April 2007. The purpose of this study was to assess the consumer awareness of travel opportunities across the province.

The survey was administered for six weeks by telephone to the general public residing in five markets: GVRD, Vancouver Island, Northern BC, Southern Interior and Alberta. A total of 3,132 surveys were completed during this time; of these, 709 were residents of Calgary and Edmonton (Alberta). This report contains the findings of the study as it pertains to the Alberta market.

Edmonton and Calgary are large, developing near-in markets with over 1.7 million residents[1] (988,193 in Calgary and 730,372 in Edmonton). As many smaller communities heavily rely on near-in markets to develop and increase tourism, Alberta is an important market to understand.

The Alberta market was more likely to take trips to near-in destinations such as Windermere/Columbia Valley, Golden and Fernie. However, most Alberta respondents had not taken recent overnight leisure trips to the prompted Community Tourism Foundations destinations. Similarly, familiarity ratings seemed to increase for near-in destinations but overall the majority reported being not very familiar with many of the communities mentioned. The lack of knowledge about these destinations may be a contributing factor in low incidence of visitation; therefore, there is a large opportunity to educate this key market especially about near-in destinations.

Overall, most Alberta respondents had not taken recent overnight leisure trips to the prompted Community Tourism Foundations destinations. Windermere/Columbia Valley had the highest incidence of travel with just over 23% of respondents having traveled there in the past two years. Several near-in Community Tourism Foundations destinations (Golden, Fernie, and Cranbrook) fell within the 10%-12% range of respondents having recently traveled there. Those who had not recently visited a specific prompted Community Tourism Foundations destination were asked about their general familiarity with that destination. Familiarity ratings ranged from 1.58 (Prince George) to 3.63 (Cranbrook) but largely remained low with most prompted destinations having a high incidence of respondents being not at all familiar.

[1] Statistics Canada, 2006 Census. Alberta defined as the City of Calgary and the City of Edmonton.

Alberta residents are looking for spring/summer destinations that are safe/clean, provide relaxation, are affordable and the weather is hot and sunny.

The most important factor when choosing a destination in the next 6 months was that the destination is safe and clean. In fact, over 6-in-10 respondents indicated that this was *Extremely Important* and, on average, this factor rated as 4.46 on a five-point scale where 1 is *Not Important At All* and 5 is *Extremely Important*.

The Alberta market is affluent, well-educated, and middle-aged.

Given the recent economic boom that Alberta has experienced, it is not surprising that the Alberta travel market is affluent; 45% of respondents reported a household income of over $100,000. Over 1-in-3 respondents in the Alberta have a University Degree (Bachelor's) and an additional 1-in-8 have a Graduate Degree. Although there is dispersion across all age brackets, Alberta respondents tend to be middle aged – nearly half (47%) are between the ages of 35 and 54.

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Section 1 - Background and Methodology

In April 2007, RA Malatest & Associated Ltd. was commissioned by Tourism BC to conduct a *Community Tourism Foundations Perceptions/Incidence Study*. This study was designed to measure travel patterns, interest and awareness of specific prompted destinations across the province that have participated in the Community Tourism Foundations Program®. The results of the research will support the refinement of community tourism development strategies. A report for each selected Community Tourism Foundations community included in the survey instrument. Once the data was collected, Tourism BC identified the opportunity to create Market Origin reports for each of the five markets surveyed.

Sample Frame

A random sample of residents from five market/regions (GVRD, Lower Vancouver Island, Northern BC, Southern Interior and Alberta) were contacted by telephone and asked to participate in a short telephone survey. The final survey instrument is included in Appendix B. Respondents qualified to participate in the survey if they had been on an overnight leisure trip outside of their community for one night or more in the 12 months prior to the survey (excluding business travel).

Depending on the region/market in which they resided, respondents were asked questions regarding their travel to and familiarity with one or more of the 20 Community Tourism Foundations communities selected for this study.

The total sample frame for the *Community Tourism Foundations Perceptions /Incidence Study* consisted of 34,112 individuals in the five eligible regions. Of the total sample frame, 6,959 were Alberta telephone numbers.

Survey Field Test

On April 3, 2007, a field test was conducted with five respondents. Based on the field test, a number of minor changes (such as question order) to the survey instrument were made.

Number of Survey Completions

The full survey began on April 4th, 2007 and completed on May 17th, 2007. A total of 3,132 people completed the survey during this time. During the six weeks that the survey was conducted, there were 709 interviews that were completed with Alberta residents, representing a 10.2% response rate. The overall sample and completion rates for each market are detailed in Table 1-1 below.

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Table 1-1 Overall Survey Completions

Regions	Population Size	Valid Sample Size	Survey Completions	Valid Response Rate (%)
Alberta (Edmonton & Calgary)[2]	1,718,565	6,959	709	10.2%
Greater Vancouver Regional District	2,116,581	6,702	481	7.2%
Lower Vancouver Island	560,724	7,428	522	7.0%
Northern British Columbia	124,173	5,344	485	9.1%
Southern Interior (Kamloops & Okanagan)	253,428	7,679	935	12.2%
OVERALL	**4,773,471**	**34,112**	**3,132**	**9.2%**

Respondents qualified to participate in the survey if they had been on an overnight leisure trip outside their community for one night or more in the past twelve months prior to the survey (excluding business travel). Because of this criterion, an additional 3,082 individuals were initially contacted but did not qualify to complete the survey. Table 1-2 shows the incidence of qualifying individuals by market.

Table 1-2 Incidence of Recent Pleasure Travel

Regions	Qualified	Non-Qualifiers	Total Contacted
Alberta (Edmonton & Calgary)	709 *(51.5%)*	669 *(48.5%)*	1,378 *(100%)*
Greater Vancouver Regional District	481 *(46.9%)*	544 *(53.1%)*	1,025 *(100%)*
Lower Vancouver Island	522 *(51.9%)*	483 *(48.1%)*	1,005 *(100%)*
Northern British Columbia	485 *(52.5%)*	438 *(47.5%)*	923 *(100%)*
Southern Interior (Kamloops & Okanagan)	935 *(49.7%)*	948 *(50.3%)*	1,883 *(100%)*
OVERALL	**3,132 *(50.4%)***	**3,082 *(49.6%)***	**6,214 *(100%)***

This report presents the findings pertaining to qualified Alberta respondents to the *Community Tourism Foundations Perceptions/Incidence Study*.

Limitations

The survey is not indicative of all travellers in the region – only those that have taken an overnight leisure trip in the past twelve months; therefore, any travellers who had taken a leisure trip over 12 months ago were not surveyed. Similarly,

[2] Alberta defined as the City of Calgary and the City of Edmonton.

the destinations discussed in this report were prompted and by no means an exhaustive list.

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Section 2 - Community Tourism Foundations® Destinations

Overall, most Alberta respondents had not taken recent overnight leisure trips to the prompted Community Tourism Foundations destinations. Windermere/Columbia Valley had the highest incidence of travel with just over 23% of respondents having traveled there in the past two years. Table 2-1 showcases the recent travel habits of Alberta residents to prompted Community Tourism Foundations destinations.

Table 2-1 Visitation to Community Tourism Foundations Destinations

Community Tourism Foundations Communities	% (n=709)	Margin of Error (at 95% confidence level)
Campbell River/Courtenay/Comox	7.6%	+/- 1.95%
Tofino/Ucluelet	5.8%	+/- 1.72%
Prince George	3.2%	+/- 1.30%
Smithers	0.8%	+/- 0.67%
Terrace	0.7%	+/- 0.62%
Windermere/Columbia Valley	23.4%	+/- 3.12%
Cranbrook	10.9%	+/- 2.29%
Kimberly	8.6%	+/- 2.06%
Fernie	11.8%	+/- 2.38%
Golden	12.7%	+/- 2.45%
Nelson	4.8%	+/- 1.57%
Osoyoos/Oliver	5.5%	+/- 1.68%

Those who had not recently visited a specific prompted Community Tourism Foundations destination were asked about their general familiarity with that destination. Familiarity ratings ranged from low familiarity (Prince George and Campbell River/Courtenay/ Comox) with a high incidence of respondents being not familiar at all to a medium familiarity (Cranbrook and Windermere/Columbia Valley) with approximately half of respondents still being not familiar at all. Table 2-2 details the distribution of responses and the average familiarity rating for each of the prompted Community Tourism Foundations destinations. The Alberta market, however, is not the exclusive feeder market for these Community Tourism Foundations destinations; therefore, detailed community reports are available. Please contact Erin O'Brien, Community Tourism Foundations Research Analyst, Tourism BC at erin.obrien@tourismbc.com or 250-356-5629.

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Table 2-2 Familiarity With Community Tourism Foundations Destinations

Community Tourism Foundations Community	Not At All Familiar 1	2	3	4	Very Familiar 5	N	Average
Campbell River/Courtenay/Comox	67.9%	12.5%	9.6%	5.3%	4.8%	647	1.67
Tofino/Ucluelet	61.6%	15.4%	11.0%	6.7%	5.3%	661	1.79
Prince George	63.6%	18.4%	9.4%	4.0%	4.7%	681	1.68
Smithers	82.4%	9.1%	3.8%	2.0%	2.7%	692	1.34
Terrace	84.3%	8.5%	2.7%	2.2%	2.3%	695	1.30
Windermere/Columbia Valley	51.8%	15.1%	14.3%	9.3%	9.5%	537	2.10
Cranbrook	47.1%	20.1%	17.2%	7.6%	8.0%	628	2.09
Kimberly	47.6%	22.0%	14.4%	7.9%	8.1%	645	2.07
Fernie	44.6%	20.6%	17.2%	9.3%	8.2%	621	2.16
Golden	39.2%	18.5%	21.8%	10.4%	10.1%	615	2.34
Nelson	61.6%	16.7%	10.4%	5.7%	5.5%	670	1.77
Osoyoos/Oliver	58.8%	16.3%	10.6%	6.6%	7.7%	663	1.88

Note: Only asked of those who did not recently travel to that specific Community Tourism Foundations destination.

Campbell River/Courtenay/Comox

Over 2-in-3 Alberta respondents that had not recently visited Campbell River/Courtenay/Comox indicated that they were not at all familiar with the destination and gave it a familiarity rating of 1.67. Based on this low familiarity, it is not surprising that only 7.6% of Alberta respondents recently (within past 2 years) visited Campbell River/Courtenay/Comox. Those that did traveled to Campbell River/Courtenay/Comox, averaged 1.31 trips and mainly went to Visit Friends and Relatives (35%), Relax (19%), and General Sightsee (13%).

Tofino/Ucluelet

Similarly to Campbell River/Courtenay/Comox, nearly 2-in-3 respondents who hadn't recently visited Tofino/Ucluelet indicated that they were not familiar at all with the destination. Tofino/Ucluelet's familiarity rating was low with an average of 1.79. Given the lack of familiarity and distance to the destination, it is not surprising that only 6% of Alberta respondents have recently traveled to this Community Tourism Foundations destination. Those that did visit averaged 1.15 trips and were mainly motivated by Relaxing (34%), General Sightseeing (17%), and Visiting Friends and Relatives (12%).

Prince George

With an average familiarity rating of 1.68 and 64% of respondents indicating that they are not familiar at all, Prince George does not have a high familiarity with Alberta respondents who have not recently been there. Approximately 3% of Alberta residents have recently traveled to Prince George for pleasure. Of those that did visit, they averaged 2.09 trips in the past two years and were predominantly motivated by Visiting Friends and Relatives (44%), General

Sightseeing (22%) and Relaxing (13%). Keep in mind that sample size is small (n=23) therefore data should be interpreted with caution.

Smithers

With less than 1% of Alberta respondents indicating that they have visited Smithers in the last two years for pleasure, the sample size is too small to draw any conclusions. Of those Alberta respondents who had not visited this Community Tourism Foundations destination, 8-in-10 indicated that they were not familiar at all with Smithers and averaged an overall familiarity rating of 1.34 where 1 is *Not At All Familiar* and 5 is *Very Familiar*.

Terrace

Similarly to Smithers, less than 1% of Alberta respondents indicating that they have visited Terrace in the last two years for pleasure; therefore, the sample size is too small to draw any conclusions. Of those Alberta respondents who had not visited this Community Tourism Foundations destination, nearly 85% indicated that they were not familiar at all with Terrace and averaged an overall familiarity rating of 1.30 where 1 is *Not At All Familiar* and 5 is *Very Familiar*.

Windermere/Columbia Valley

Although over 50% of Alberta respondents who had not recently visited Windermere/Columbia Valley indicated that they were not familiar at all with the destination, and gave it an overall familiarity rating of 2.10.
Windermere/Columbia Valley was the most popular of the Community Tourism Foundations prompted destinations with nearly 1-in-4 Alberta respondents indicating that they have recently visited the area. Of those that did visit, they averaged 3.06 trips and were mainly motivated to Relax (25%), Visit Friends and Relatives (14%) and Golf (14%).

Cranbrook

Nearly half (47%) of respondents who hadn't recently traveled to Cranbrook indicated that they were not familiar at all with this destination and gave it a familiarity rating of 2.09. Nearly 11% of Alberta respondents visited this destination in the past two years averaging 2.08 trips. Of those visitors, the main reasons for the trip ranged tremendously with the majority going to Visit Friends and Relatives (22%), General Sightsee (18%), and Relax (14%).

Kimberley

Nearly 50% of respondents who hadn't recently visited Kimberley indicated that they were not familiar at all with the destination and gave it an overall low familiarity rating of 2.07. Nearly 9% of Alberta respondents have recently traveled to Kimberley. Those that did visit averaged 2.08 trips and were motivated by Golf

(31%), General Sightseeing (21%), Skiing (12%), and Visiting Friends and Relatives (12%).

Fernie

With 45% of respondents who hadn't recently visited Fernie being not at all familiar with the destination, the average familiarity rating was 2.16. Nearly 1-in-8 Alberta respondents have recently traveled to Fernie for leisure. Of those that did travel to this destination, they averaged 3.27 trips and were motivated to Ski (25%), Visit Friends and Relatives (14%), and Relax (13%).

Golden

Approximately 4-in-10 Alberta respondents indicated that they were not at all familiar with this destination and averaged a familiarity rating of 2.34. Nearly 13% of Alberta respondents have taken a recent trip to Golden. Those that did take a recent trip to this destination averaged 2.76 trips and mostly went to General Sightsee (19%), Relax (19%), and Ski (13%).

Nelson

Over 6-in-10 Alberta respondents indicated that they were not at all familiar with this destination and gave it a low familiarity rating of 1.77. However, only 1-in-20 Alberta respondents recently visited Nelson. Those that did take a recent trip to this destination averaged 2.44 trips and mostly went to General Sightsee (24%), Visit Friends and Relatives (21%), and Relax (21%). Keep in mind that sample size is small (n=34) therefore data should be interpreted with caution.

Osoyoos/Oliver

Nearly 6-in-10 Alberta respondents indicated that they were not at all familiar with this destination and averaged a low familiarity rating of 1.88. However, only 6% of Alberta respondents recently visited Osoyoos/Oliver. Those that did take a recent trip to this destination averaged 1.46 trips and mostly went to Visit Friends and Relatives (26%), and Relax (21%). Keep in mind that sample size is small (n=39) therefore data should be interpreted with caution.

Section 3 – Future Trip Planning

Alberta residents were asked how important various factors would be when choosing a destination for an overnight leisure trip in the next six months. Due to the timing of the survey, responses mainly encompass spring/summer travel planning.

Alberta residents are looking for spring/summer destinations that are safe/clean, provide relaxation, are affordable and the weather is hot and sunny.

The most important factor when choosing a destination in the next 6 months was that the destination is safe and clean. In fact, over 6-in-10 respondents indicated that this was Extremely Important and, on average, this factor rated as 4.46 on a five-point scale where 1 is *Not Important At All* and 5 is *Extremely Important*.

In addition to Safe and Clean, respondents consider if the destination has a place to relax and unwind as very important in their decision making. Over half (57%) of respondents indicated that this is extremely important with an average rating of 4.34. Affordability and if the destination is hot and sunny were also considered very important with 43% of respondents rating both as Extremely Important and averaging 4.06 and 3.96, respectively on the five-point importance scale. As mentioned, this question centered on spring/summer travel planning therefore, some factors may differ for travel during other times of the year. Specifically, consideration if the destination is hot and sunny would likely be different if considering a fall or winter vacation.

Alberta residents are less concerned with proximity, romance and golf when choosing a destination for their spring/summer leisure trip. In fact, nearly 6-in-10 considers the availability of golf as *Not Important At All*. Despite the growth in popularity of golf and as a tourism sector, travel for the main purpose of golfing remains a niche segment of travellers. However, those that do consider golf opportunities when choosing their spring/summer destination rank it as very important – despite the lowest overall ranking, nearly 12% of respondents ranked golf opportunities as *Extremely Important*.

Table 3-1 showcases how Alberta respondents rate the importance of each factor when choosing a Spring/Summer destinations.

Table 3-1 Factors in Choosing a Spring/Summer Destination

DESTINATION FACTORS	Not Important At All 1	2	3	4	Extremely Important 5	N	Average
Romantic	29.7%	18.2%	30.5%	13.0%	8.6%	698	2.53
Offers Cultural Events (such as arts and music)	23.0%	22.4%	29.7%	17.2%	7.7%	704	2.64
A Place to Golf	56.5%	10.2%	11.8%	10.1%	11.5%	706	2.10
A Place to Participate in Outdoor Water-Based Activities	19.6%	14.8%	24.0%	22.6%	19.0%	704	3.07
A Place to Participate in Outdoor Land-Based Activities	8.5%	13.6%	29.0%	27.2%	21.7%	706	3.40
Offers a Variety of Outdoor Activities	6.4%	10.2%	25.1%	30.9%	27.4%	705	3.63
A Place to Relax and Unwind	2.3%	3.3%	9.1%	28.7%	56.7%	704	4.34
Heritage and Historical Sights	10.7%	16.3%	34.1%	25.0%	13.9%	704	3.15
A Place With Opportunities to Visit National and Provincial or State Parks	7.1%	14.2%	32.3%	26.2%	20.1%	705	3.38
Offers Wide Rage of Activities for the Entire Family	13.5%	14.3%	16.5%	23.0%	32.7%	697	3.47
Hot and Sunny	4.0%	6.2%	22.1%	24.8%	42.8%	705	3.96
An Exciting Place to Be	4.6%	9.8%	25.7%	25.2%	34.7%	701	3.76
Affordability	2.8%	4.0%	20.7%	29.9%	42.6%	706	4.06
A Place That is Close to Home	24.7%	21.4%	30.7%	13.5%	9.7%	704	2.62
Safe and Clean	1.4%	2.0%	8.5%	25.5%	62.6%	705	4.46
Unique Local Cuisine	6.4%	15.5%	32.9%	25.5%	19.8%	703	3.37
Restaurants, Shopping and Nightlife	10.1%	19.0%	33.8%	20.1%	17.0%	705	3.15

Appendix A shows the difference in destination factors by characteristics including age, gender, household income, household composition and education level. As shown in Table A-1 in Appendix A, respondents with different household characteristics were found to have distinct ratings on several destination factors including availability of Golf, Wide Range of Activities for the Entire Family, Hot and Sunny, and Affordability, . Not surprisingly those that have annual incomes less than $65,000 rated Affordability as more important than their more affluent counterparts. Similarly, the importance rating for Golf directly corresponded to income – as income increases, the importance of if the destination offers Golf increases.

Households without children 18 or younger tend to rate the availability of Unique Local Cuisine as more important in their decision making for their summer vacation destination. The child-in-house counterparts are more likely to consider the following destination factors as more important; Outdoor Activities (Water-

Based, Land-Based, and Variety Available), Wide Range of Activities for the Entire Family, Hot and Sunny, and is an Exciting Place to Be. These differences are highlighted in Table A-2 in Appendix A.

Respondents from different age categories had divergent views as to what community features were most important to them. Some of the differences, such as younger respondents tend to rate if the destination is exciting as more important than their older counterparts, were quite predictable; however, there are many factors that are more complex. These differences are showcased in Table A-3 in Appendix A.

Gender (Table A-4) and Education (Table A-5) also are determinants of significant differences in some destination factors. Males, for instance, are more likely to consider if the destination offers Golf. Likewise, the more educated the respondent, the less concerned they are with how exciting the destination is when choosing for their next summer trip. The various differences are outlined in Appendix A.

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Section 4 - Alberta Demographics

Edmonton and Calgary are large, developing near-in markets with over 1.7 million residents[3] (988,193 in Calgary and 730,372 in Edmonton). As many smaller communities heavily rely on near-in markets to develop and increase tourism, Alberta is an important market to understand.

Household Composition

Residents living in Alberta (as defined by the city of Calgary and Edmonton) tend to live in child-less households. In fact, over 6-in-10 of respondents do NOT have children 18 years old or younger in their household[4]. According to the 2006 Census, there are approximately 366,550 private households (54% of all households) that are either couples without children or one-person households in the Alberta market.[5] Consistent with other markets included in the study, slightly over 6-in-10 respondents were female[6]. However, according to the 2006 Census, half (50%) of the population, or 864,660, in the Alberta (Calgary and Edmonton) market are female.

Household Income

Alberta residents are relatively affluent with almost half (45%) reporting an annual household income of over $100,000. Although the two factors cannot be directly correlated in this study, the variation in household income is likely influenced by differences in household composition. For instance, a single-income household is likely to have a lower household income than their multiple-income household counterparts. Table 4-1 details the annual household incomes of respondents in this market.

Table 4-1 Annual Household Income

Annual Household Income	% (n=505)
Under $40,000 per year	10.5%
$40,000 to less than $65,000	16.0%
$65,000 to less than $100,000	28.7%
$100,000 to less than $150,000	28.5%
$150,000 or more	16.2%

[3] Statistics Canada, 2006 Census. Alberta defined as the City of Calgary and the City of Edmonton.
[4] Margin of error of +/- 3.60% at a 95% confidence level.
[5] Statistics Canada, 2006. Note that this figure does not include 'Other Household Types' which represent multiple-family households, lone-parent family households and non-family households other than one-person households. 'Other Household Types' accounts for an additional 124,865 private dwellings in the cities of Calgary and Edmonton.
[6] Margin of error of +/- 3.58% at a 95% confidence level.

Age

Although there is dispersion across all age brackets, Alberta respondents tend to be between 35 and 54 years old – nearly half (47%) fall within this category. Population distribution indicated on the 2006 Census varies slightly. This difference may be attributable to the higher incidence of travel with older, wealthier individuals as well as the survey tool itself – typically, a higher proportion of older people take the time to participate in telephone surveys. Table 4-2 shows the differences as well as the Census population for each category.

Table 4-2 Age Category

Age Category	Respondent % (n=698)	Population %	Alberta Population[7]
18 to 24	7.7%	11.0%[8]	143,230[8]
25 to 34	13.8%	21.2%	276,250
35 to 44	20.6%	21.0%	272,645
45 to 54	25.9%	20.5%	266,725
55 to 64	17.5%	12.4%	161,295
65 or older	14.5%	13.9%	181,345

Education

Most respondents in Alberta are well educated with over 1-in-3 having a University Degree (Bachelor's) and an additional 1-in-8 having a Graduate Degree. Table 4-3 details the highest level of education reported by Alberta respondents.

Table 4-3 Highest Level of Education

Highest Level of Education	% (n=694)
Grade School or Less	0.3%
High School Incomplete	2.6%
High School Complete	17.3%
Some University/College	11.0%
Completed College	21.5%
University (Bachelor's Degree)	35.4%
Graduate Degree	12.0%

[7] Statistics Canada, 2006 Census. Alberta defined as the City of Calgary and the City of Edmonton.
[8] 2006 Census age category of 20 to 24.

Appendix A – Importance Rating of Destination Factors by Characteristics

Table A-1 Destination Factors by Household Income*

Destination Factors	Household Income				
	Under $40,000 per year	$40,000 to less than $65,000	$65,000 to less than $100,000	$100,000 to less than $150,000	$150,000 or more
A Place to Golf	1.77	1.79	2.02	2.42	2.49
Offers Wide Rage of Activities for the Entire Family	2.88	3.25	3.49	3.69	3.73
Hot and Sunny	3.49	3.96	3.90	4.06	4.20
Affordability	4.26	4.27	4.03	4.11	3.48

* - Only showing the results where difference between respondent groups are significant at 95%.

Table A-2 Destination Factor by Household Composition*

Destination Factors	Has a Child 18 or Younger	
	Yes	No
A Place to Participate in Outdoor Water-Based Activities	3.46	2.81
A Place to Participate in Outdoor Land-Based Activities	3.71	3.20
Offers a Variety of Outdoor Activities	3.93	3.43
Offers Wide Rage of Activities for the Entire Family	4.25	2.96
Hot and Sunny	4.12	3.86
An Exciting Place to Be	3.92	3.65
Unique Local Cuisine	3.20	3.47

* - Only showing the results where difference between respondent groups are significant at 95%.

Table A-3 Destination Factors by Age*

Destination Factors	Age					
	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or Older
Romantic	2.80	2.63	2.65	2.61	2.48	1.93
Offers Cultural Events (such as arts and music)	3.22	2.49	2.55	2.52	2.87	2.54
A Place to Participate in Outdoor Water-Based Activities	3.83	3.29	3.47	3.20	2.57	2.20
A Place to Participate in Outdoor Land-Based Activities	3.78	3.66	3.74	3.47	3.15	2.69
Offers a Variety of Outdoor Activities	4.22	3.86	3.96	3.72	3.41	2.75
Heritage and Historical Sights	3.11	2.77	3.03	3.10	3.41	3.54
Offers Wide Rage of Activities for the Entire Family	3.56	3.54	4.09	3.54	3.11	2.76
Hot and Sunny	4.15	3.85	4.11	4.11	3.89	3.57
An Exciting Place to Be	4.56	3.97	3.76	3.78	3.54	3.32
Safe and Clean	4.47	4.21	4.59	4.49	4.40	4.53
Unique Local Cuisine	3.33	3.20	3.19	3.35	3.53	3.63
Restaurants, Shopping and Nightlife	3.72	3.27	2.93	3.14	3.27	2.91

* - Only showing the results where difference between respondent groups are significant at 95%.

Table A-4 Destination Factor by Gender*

Destination Factors	Gender	
	Male	Female
Offers Cultural Events (such as arts and music)	2.49	2.73
A Place to Golf	2.22	2.02
A Place to Relax and Unwind	4.23	4.41
A Place With Opportunities to Visit National and Provincial or State Parks	3.16	3.52
Offers Wide Rage of Activities for the Entire Family	3.21	3.63
Hot and Sunny	3.81	4.06
Affordability	3.87	4.17
Safe and Clean	4.28	4.57
Unique Local Cuisine	3.20	3.47

* - Only showing the results where difference between respondent groups are significant at 95%.

Table A-5 Destination Factor by Education*

Destination Factors	Education					
	Less than High School Complete**	High School Complete	Some College/ University	College Complete	University Degree (Bachelor's)	Graduate Degree
Hot and Sunny	3.80	4.08	4.04	4.08	3.96	3.59
An Exciting Place to Be	3.95	4.08	4.12	3.72	3.63	3.43
Restaurants, Shopping and Nightlife	3.05	3.40	3.43	3.12	3.01	3.11

* - Only showing the results where difference between respondent groups are significant at 95%.
** - The category is collapsed in order to make the subtotal sample size greater than 10.

Appendix B – Overnight Leisure Trips Questionnaire

Introduction

Hello, my name is _____ from Malatest & Associates. I am calling on behalf of Tourism British Columbia and we are conducting a short survey about your recent travel. May I speak with an adult in your household who is a least18 years of age?

This survey is about overnight leisure trips (including shopping and dining). By overnight leisure trip I mean a trip outside your day-to-day environment for ***one night or more***. Please do not include any business travel.

Do you have some time now to answer a few questions?

1. Yes (Continue)
2. No (Schedule a call-back time)

1. Have you taken an overnight leisure trip ("*outside the Greater Vancouver Regional District" ONLY IF respondent resides in the Greater Vancouver Regional District,* "*outside your community" for the rest of markets)* in the past 12 months?

   1. Yes (Continue)
   2. No (Confirm, and exit – code as Non-Qualifier)
   8. Don't Know/No Response (Confirm, exit – code as Refusal)

   1b. How many trips?

   _____

2a. In the past 2 years, have you taken an overnight leisure trip to the following locations?

   [Surveyor note: Communities listed will vary according to the region you are calling]

   1. Yes (Continue to Q2b)
   2. No (Go to next community – Q3 if no more communities listed)
   8. Don't Know/No Response (Go to next community –Q3 if no more communities listed)

   2b. How many overnight trips?

   _____

2c. Was it your primary destination or part of a trip to another destination?
[Surveyor note: Select response from list of codes provided]

	Been on an overnight leisure trip?		Number of Overnight Leisure Trips?	What was the primary purpose of your most recent trip?
	NO	YES		*SEE LIST OF CODES*
SEE APPENDIX C FOR APPROPRIATE COMMUNITIES	◻	◻		*BELOW**

*What was the primary purpose of your most recent trip? – List of Codes

1. General Sightseeing
2. Relaxing
3. Visiting friends/relatives
4. Shopping
5. Arts/Culture
6. City Town Sightseeing
7. Walking
8. Hiking
9. Fishing
10. Camping
11. Other outdoors/activities/wilderness
12. Golfing
13. Skiing
14. Participate in other sport
15. Attending fairs/festivals
16. Other
17. Nothing in particular, Don't know

3. *IF NO IN q2a*: You mentioned that you have not been on an overnight trip to the following communities in the last 2 years. On a scale from 1 to 5 where 1 is 'not at all familiar' and 5 is 'very familiar' how familiar are you with any of these specific communities?

	Not at all Familiar 1	2	3	4	Very Familiar 5	DK / Refused
COMMUNITIES LISTED IN Q2A WHERE Q2A = NO	◻	◻	◻	◻	◻	◻

4. ***IF NO IN Q2a for all communities listed**:* Where have you been on your overnight leisure trip(s) in the last 2 years? This includes trips both within and outside of British Columbia. *[Surveyor note: List First 3 mentioned]*

IF YES IN Q2a for any communities listed: Have you been on any overnight leisure trip to any other locations, either within, or outside of British Columbia in the last 2 years? *[Surveyor note: List First 3 mentioned]*

- □ No where
- 1. _____
- 2. _____
- 3. _____
- 8. Don't Know/No Response

5. If you were choosing a destination for an overnight leisure trip (> 1 night) in the next six months (spring/summer), how important are each of the following factors when making your choice? Where 1 is 'Not important at all' and 5 is 'Extremely important.'

	Not at all Important 1	2	3	4	Extremely Important 5	DK / Refused
Romantic	□	□	□	□	□	□
Offers cultural events such as arts and music	□	□	□	□	□	□
A place to golf	□	□	□	□	□	□
A place to participate in outdoor water-based activities	□	□	□	□	□	□
A place to participate in outdoor land-based activities	□	□	□	□	□	□
Offers a variety of outdoor activities	□	□	□	□	□	□
A place to relax and unwind	□	□	□	□	□	□
Heritage and historical sites	□	□	□	□	□	□
A place with opportunities to visit national and provincial or state parks	□	□	□	□	□	□
Offers wide range of activities for the entire family	□	□	□	□	□	□
Hot and Sunny	□	□	□	□	□	□
An exciting place to be	□	□	□	□	□	□
Affordability	□	□	□	□	□	□
A place that's close to home	□	□	□	□	□	□
Safe and clean	□	□	□	□	□	□
Unique local cuisine	□	□	□	□	□	□
Restaurants, shopping and nightlife	□	□	□	□	□	□
Other (Please specify)	□	□	□	□	□	□

I am now going to ask you some questions regarding <COMMUNITY>.

[Surveyor note: This community has been selected because the respondent has indicated that they have either visited the community on an overnight leisure trip in the last 2 years or is at least somewhat familiar with the community. Respondent will be asked about 2 communities]
[Quota of 50 responses per community]

6. What are the things that appeal to you about overnight getaways or vacations to **<COMMUNITY>**? *[Surveyor note: Multiple response, collect up to 5 items, probe for specific items – more than just 'it's close']*

1. AGRICULTURAL ATTRACTIONS – FARMS STORES, TOURS
2 ART GALLERY/GALLERIES
3. BEACHES
4. BEAUTIFUL PLACE TO VISIT/BEAUTIFUL COUNTRY/SURROUNDINGS/SCENERY
5. BOATING
6. CAMPING
7. CLOSE TO VARIOUS PLACES/SITES
8. CROSS COUNTRY SKIING
9. CUTLURAL SITES (INCLUDING ABORIGINAL)
10. DOWNHILL SKIING
11. DRIVING/TOURING AROUND
12. ENROUTE TO VARIOUS PLACES/PASSING THROUGH
13. FERRY
14. FESTIVALS AND EVENTS
15. FISHING
16. FRIENDS/FAMILY LIVE THERE
17. GOLF
18. HIKING
19. HISTORIC/HERITAGE
20. HOTEL/RESORTS
21. LAKE/RIVER/OCEAN/WATER/ISLANDS
22. MUSEUM/RAILWAY MUSEUM
23. NEAT/QUIET
24. OTHER WINTER ACTIVITES
25. PROVINCIAL PARK
26. RELAXATION/LAID BACK LIFESTYLE
27. RESTAURANTS/PUB
28. SHOPPING
29. SIGHTSEEING
30. SMALL TOWN FEEL/QUAINT TOWN
31. SNOWMOBILING
32. SNOWSHOEING
33. SPA'S
34. THE PEOPLE/FRIENDLY PEOPLE/UNIQUE PEOPLE
35. WALKING/WALKING AROUND
36. WATER SPORTS/ADVENTURES/ACTIVITIES
37. WEATHER/GOOD WEATHER
38. WILDLIFE/WILDERNESS
39. WINERY/BREWERY/WINE TOURS

40. NOTHING
41. DON’T KNOW/REFUSED
42. OTHER _____

7. What prevents you from visiting **<COMMUNITY>** more frequently? *[Surveyor note: Probe for other responses than ‘time’ related]*

1. ALL OTHER FAMILY MENTIONS
2. DO NOT DRIVE/DON’T TRAVEL MUCH
3. DON’T KNOW ANYTHING ABOUT THE PLACE/LACK OF INFORMATION
4. EXPENSE OF FERRY
5. HAVE OTHER PLACES TO VISIT/ALREADY BEEN THERE
6. HEALTH PROBLEMS
7. I LIVE/LIVED THERE
8. IT’S EXPENSIVE/LACK OF FUNDS/MY BUDGET
9. LACK OF TIME
10. NO FAMILY OR FRIENDS THERE
11. NO ONE TO TRAVEL WITH
12. NOT ENOUGH ATTRACTIONS/ACTIVITIES/THINGS TO DO
13. NOT INTERESTED/NO PLANS TO GO
14. NOTHING FUN/INTERESTING THERE
15. PREFER HOT/SUNNY PLACES
16. PREFER TO GO TO BEACHES
17. PREFER TO GO TO THE LAKES
18. PREFER TO GO TO THE MOUNTAINS
19. TIME TO TRAVEL ON FERRY
20. TOO FAR AWAY/TOO MUCH DRIVING
21. UNABLE TO TRAVEL BY CAR/NO CAR
22. VACATION PROPERTY SOMEWHERE ELSE
23. YOUNG KIDS/CHILDREN/CAN’T TRAVEL WITH KIDS
24. NOTHING
25. DON’T KNOW/NO RESPONSE
26. DID NOT LIKE IT LAST TIME…….IF THIS RESPONSE ASK WHY NOT? _____
27. OTHER _____

8. Based on your experience, or anything you may have read, heard or seen, please rate the extent to which you associate each of the following with **<COMMUNITY>**. Where 1 = Does not describe at all and 5 = Describes completely.

	Not at all Important 1	2	3	4	Extremely Important 5	DK / Refused
Romantic	◻	◻	◻	◻	◻	◻
Offers cultural events such as arts and music	◻	◻	◻	◻	◻	◻
A place to golf	◻	◻	◻	◻	◻	◻
A place to participate in outdoor water-based activities	◻	◻	◻	◻	◻	◻
A place to participate in outdoor land-based activities	◻	◻	◻	◻	◻	◻
Offers a variety of outdoor activities	◻	◻	◻	◻	◻	◻
A place to relax and unwind	◻	◻	◻	◻	◻	◻
Heritage and historical sites	◻	◻	◻	◻	◻	◻
A place with opportunities to visit national and provincial or state parks	◻	◻	◻	◻	◻	◻
Offers wide range of activities for the entire family	◻	◻	◻	◻	◻	◻
Hot and Sunny	◻	◻	◻	◻	◻	◻
An exciting place to be	◻	◻	◻	◻	◻	◻
Affordability	◻	◻	◻	◻	◻	◻
A place that's close to home	◻	◻	◻	◻	◻	◻
Safe and clean	◻	◻	◻	◻	◻	◻
Unique local cuisine	◻	◻	◻	◻	◻	◻
Restaurants, shopping and nightlife	◻	◻	◻	◻	◻	◻
Other (Please specify)	◻	◻	◻	◻	◻	◻

9. On a scale of 1 to 5, where 1 is definitely not and 5 is definitely will, how likely do you think you are to take an overnight leisure trip to **<COMMUNITY>** in the next two years?

	Not at all Important 1	2	3	4	Extremely Important 5	DK / Refused
An overnight leisure trip	◻	◻	◻	◻	◻	◻

10. If you were thinking about a taking an overnight leisure trip to **<COMMUNITY>**, what other destinations or areas would you consider for a similar kind of trip? *[Surveyor note: Record up to three (3) destinations]*

    1. _____
    2. _____
    3. _____
    8. Don't Know/No Response *[Probe for at least 1 destination]*

11. What is unique about **<COMMUNITY>**, what makes it different from the other destinations you just mentioned? *[Surveyor note: Probe for unique responses – more than just 'it's close']*

_____

_____

_____

_____

    □ Nothing

[Surveyor note: Confirm with respondent that nothing is unique about <community>]

    8. Don't Know/No Response

12. Now I would like you to compare an overnight leisure trip in **<COMMUNITY>** with one in <**1st Mentioned in Q11**>. Please indicate if you feel **<COMMUNITY>** would be better; <**1st Mentioned in Q11**> would be better; they would be equal, or if neither would be better; for each of the following:

    1. GOOD VALUE FOR MONEY
    2. GOOD PLACE FOR LAND-BASED OUTDOOR RECREATION ACTIVITIES
    3. GOOD PLACE FOR WATER-BASED OUTDOOR RECREATION ACTIVITIES
    4. GOOD PLACE TO RELAX AND UNWIND
    5. GOOD PLACE FOR ARTS AND CULTURE
    6. GOOD PLACE FOR HERITAGE AND HISTORICAL SITES
    7. GOOD PLACE FOR ABORIGINAL CULTURAL ACTIVITIES
    8. FRIENDLY PEOPLE
    9. GOOD OPPORTUNITIES TO VISIT PROVINCIAL PARKS
    10. PLENTY OF THINGS THAT APPEAL TO CHILDREN
    11. SAFE AND CLEAN
    12. BEAUTIFUL NATURAL SCENERY
    13. EXCELLENT SHOPPING
    14. EXCELLENT RESTAURANTS
    15. FEELS QUITE DIFFERENT FROM AT HOME
    16. FUN NIGHTLIFE AND ENTERTAINMENT
    17. LOTS OF DIFFERENT ACTIVITIES AND THINGS TO DO

[IF RESPONDENT INDICATED THAT THEY HAVE EITHER VISITED (FOR AN OVERNIGHT LEISURE TRIP IN THE LAST 2 YEARS) OR IS AT LEAST SOMEWHAT FAMILIAR WITH 2 OR MORE COMMUNITIES – SURVEY WILL RETURN AND ASK QUESTION 6 – 12 FOR ANOTHER COMMUNITY.]

And now, just a few quick questions for statistical purposes…..

13. What is the highest level of education that you have completed? *[Surveyor note: Read as necessary]*

    1. GRADE SCHOOL OR LESS
    2. HIGH SCHOOL INCOMPLETE
    3. HIGH SCHOOL COMPLETE
    4. SOME COLLEGE/UNIVERSITY
    5. COLLEGE CERTIFICATE/DIPLOMA
    6. UNIVERSITY (BACHELOR'S DEGREE)
    7. GRADUATE DEGREE
    9. REFUSED

14. Are there any children 18 years old or younger living in your household?

    1. YES
    2. NO
    9. DON'T' KNOW/REFUSED

15. Into which of the following age categories do you fall?

    1. 18 TO 24
    2. 25 TO 34
    3. 35 TO 44
    4. 45 TO 54
    5. 55 TO 64
    6. 65 OR OLDER
    9. REFUSED

16. Into which of the following categories does your total household income fall, before taxes?

    1. UNDER $40,000 PER YEAR
    2. $40,000 TO LESS THAN $65,000
    3. $65,000 TO LESS THAN $100,000
    4. $100,000 TO LESS THAN $150,000
    5. $150,000 OR MORE
    9. DON'T' KNOW/REFUSED

17. Gender *[Surveyor note: Record, do not ask]*

    1. MALE
    2. FEMALE

That completes the survey, thank you very much for taking the time to participate!