



Tourism Vancouver Island Positioning Study

Tourism Vancouver Island | September
2022

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The experience & insights platform

Objective:

To determine **how to position three regions of Vancouver Island** (Northern Vancouver Island, Comox Valley and Cowichan Region) **to attract tourism** to these regions from four key target markets (British Columbia, Alberta, Ontario and Washington State)

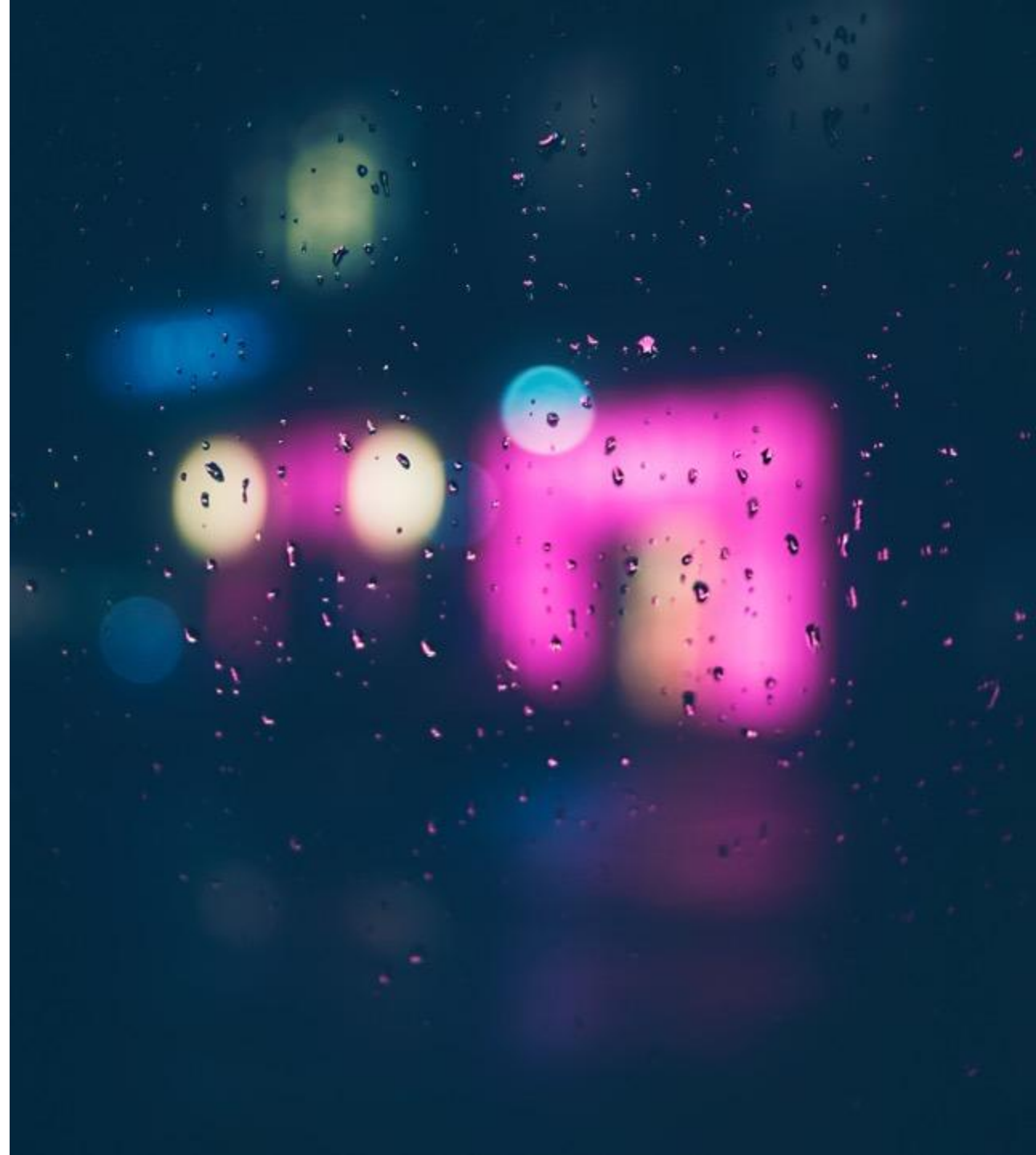
Methodology:

From August 24 to September 1, 2022, Maru/Blue conducted a 15-minute online survey among 4076 adults (18+) who travel in the following regions:

- n=1,010 British Columbia
- n=1,012 Alberta
- n=1,049 Ontario
- n=1,005 Washington State

Results we weighted by age and gender within each region

The survey was conducted in English and French



Summary

1. There is a great opportunity to attract travellers from British Columbia, Alberta and Ontario to Vancouver Island, but it may be a bit harder to bring in travellers from Washington

- A clear majority of BC travellers (93%) are likely to travel within their province in the next 2 years
- Most AB (87%) and ON (74%) travellers are likely to travel domestically outside their province in the next 2 years
- Yet only half (49%) of Washington travellers are likely to travel to Canada in the next 2 years, although nearly two-thirds are interested in travel to Vancouver Island specifically

2. Most want to travel to a beach town to feel a sense of well-being, stability and ability to revive

- Beach towns are the top destination for all regions (62%), with mountain areas second for AB (59%) and WA (54%), and small towns for BC (53%) and ON (46%)

3. Most travellers are aware of Vancouver Island, and there is an opportunity to tell AB, ON and WA travellers about the different regions

- Nearly all travellers are aware of Vancouver Island (94% BC, 92% AB, 89% ON), although Washington travellers are least aware (74%) and many BC travellers are aware of the 3 regions
- AB travellers are less aware of the 3 regions and few in ON and WA are aware

Summary

4. Overall, Vancouver Island is seen as a great travel destination, especially in the summer

- It's clear that travellers see Vancouver Island as a travel destination for them (83%)
- They consider it safe (94%), welcoming (92%), a place to visit with children (85%), easy to get around (77%)
- But it's more of a summer destination (68%)

5. And it offers many activities that travellers enjoy such as eating out, beaches and parks, although not seen as offering theatre which is something travellers enjoy

- Most travellers enjoy eating out, beaches and parks, as well as historical sites, hiking, farmer's markets, festivals, shopping and museums – all of which are also associated with Vancouver Island overall. Matching what each region offers with what travellers enjoy would be a great way to position each region
- There is also interest in theatre, which is not currently associated with Vancouver Island
- And a few activities such as golfing, fishing, biking, Indigenous experiences, outdoor adventures and boating where enjoyment ratings are on the lower end

6. However, there are concerns around affordability, the weather and ease of getting there

- Travellers are split on affordability, with many ON and AB travellers saying Vancouver is *not* an affordable place to travel
- The weather also causes concern for some. Many describe the weather as unpredictable (59%) and rainy (57%) – higher among AB, ON and WA travellers
- Getting there is also seen as a challenge for some (39%), again higher among AB, ON and WA travellers

Summary – Vancouver Island

Unaided word associations

Vancouver Island

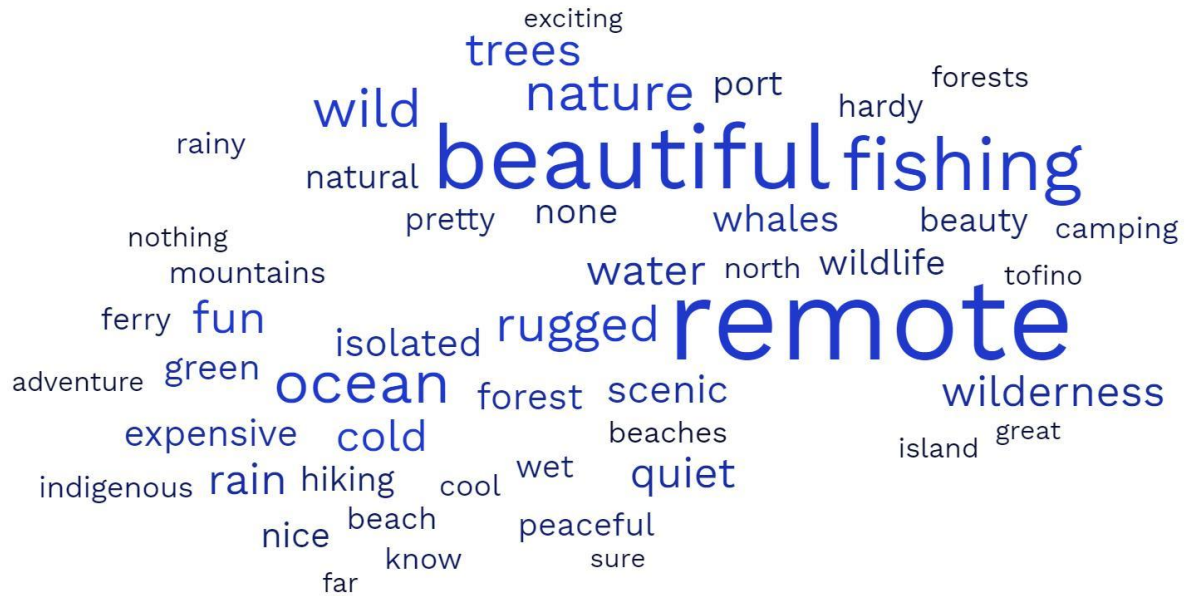
- beautiful
- ferries
- ocean
- expensive
- Victoria
- water
- nature
- beach
- peaceful
- fun



Summary – Northern Vancouver Island

Unaided word association Island

- remote
- beautiful
- wild
- fishing
- ocean
- nature
- rugged
- trees
- fun
- cold



Summary – Cowichan Valley

Unaided word associations

Cowichan Valley

- lake
- beautiful
- wine
- Indigenous
- trees
- nature
- Duncan
- farms
- quiet
- small

- # Cowichan Valley
- lake
 - beautiful
 - wine
 - Indigenous
 - trees
 - nature
 - Duncan
 - farms
 - quiet
 - small

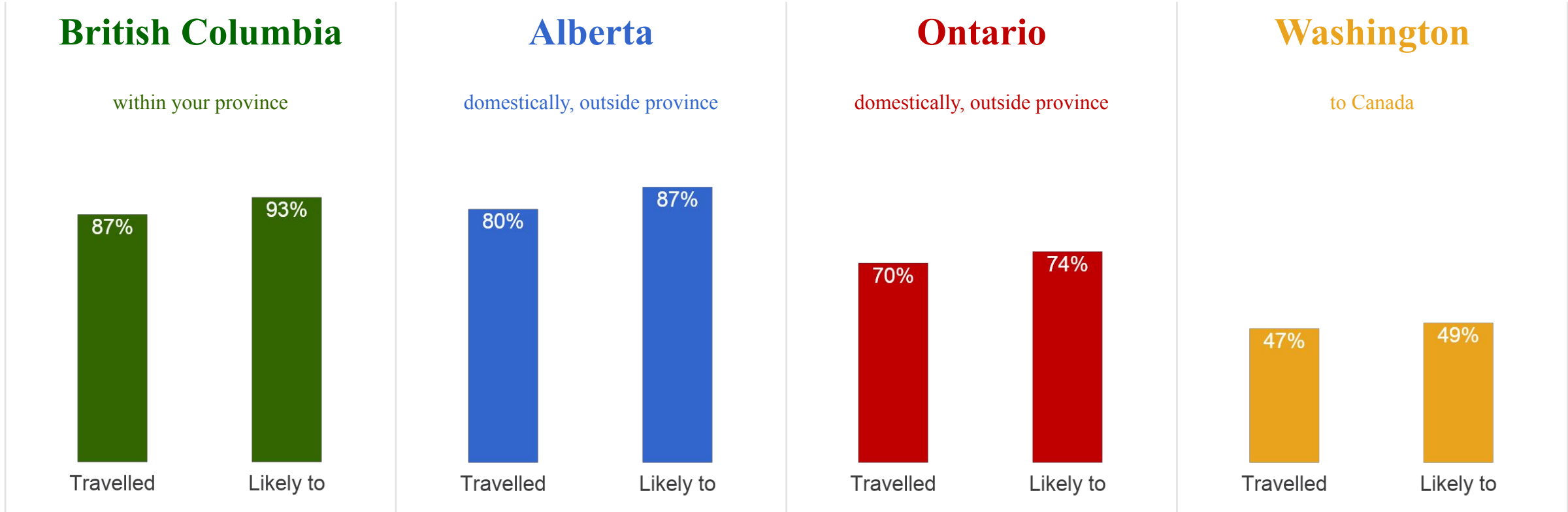


Travel Experience & Wants

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Attracting travellers to Vancouver Island from Washington may be more challenging from British Columbia, Alberta and Ontario



Q4. Have you ever travelled for leisure...? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)
Q5. How likely are you to travel to each of the following for leisure in the next 2 years or so? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Beach towns are top destinations for all regions, with mountains second for AB and WA, and small towns for BC and ON

		British Columbia	Alberta	Ontario	Washington
Beach towns/areas	62%	61%	60%	55%	73% ▲
Mountain towns/areas	49%	49%	59% ▲	36% ▼	54%
Small cities and towns	47%	53% ▲	44%	46%	46%
Resorts	40%	40%	44%	42%	33% ▼
Large metropolitan cities	39%	45% ▲	39%	40%	32% ▼
Countryside/rolling hills	35%	35%	33%	35%	36%
Remote wilderness areas	27%	27%	24%	21%	36% ▲
Cruises	21%	24% ▲	20%	19%	19%

Q10. When travelling for leisure, what types of places do you most enjoy? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

▲ = higher than other regions
▼ = lower than other regions

Emotional Signature – Ideal Travel Destination

top 3 emotions coded in the images selected

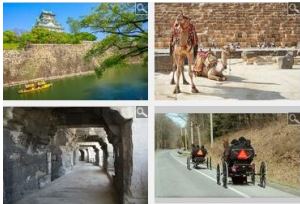


Overall, travellers want to feel a sense of well-being, stability and revival when travelling to their ideal destination

Travellers from all regions want that sense of well-being and revival

In British Columbia and Alberta ‘determined’ replaces ‘unchanging’ as the third emotion

Determined
persistent



Q10. Please select the (10) images that together you feel best represent the full range of qualities and characteristics of your IDEAL TRAVEL DESTINATION. Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

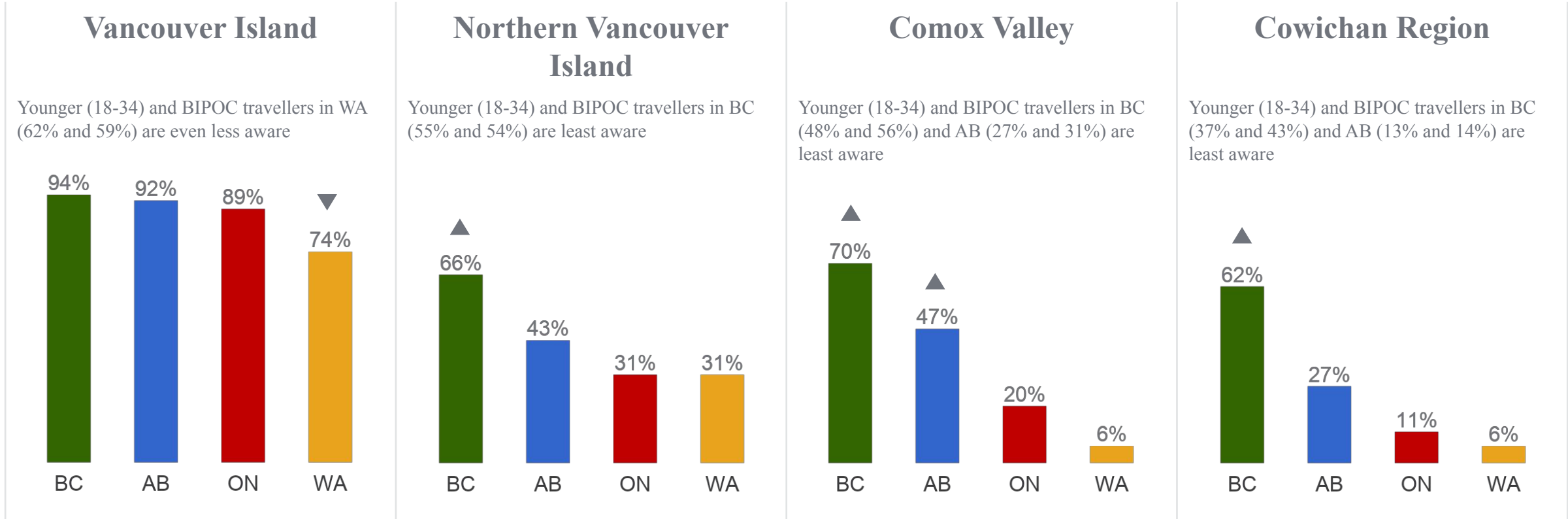
Vancouver Island & Regions of Interest

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While most travellers are aware of Vancouver Island, most are *not* aware of Northern Vancouver Island, Comox Valley and Cowichan, apart from BC travellers

Awareness



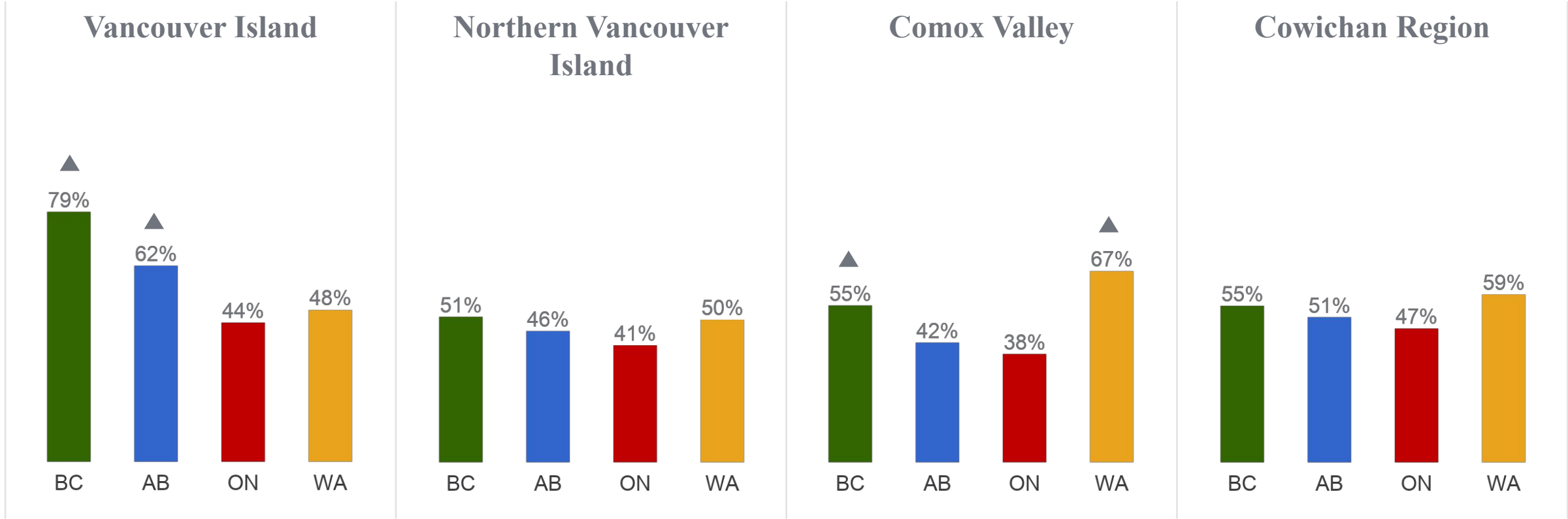
Q14. Which of the following places, cities or regions in British Columbia are you aware of? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)
 Q16. Which of the following places, cities or regions on Vancouver Island are you aware of? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

▲ = higher than other regions
 ▼ = lower than other regions

Even when aware, only about half would say they are familiar with Northern Vancouver Island, Comox Valley and Cowichan as travel destinations

Familiarity (among aware)

very + somewhat



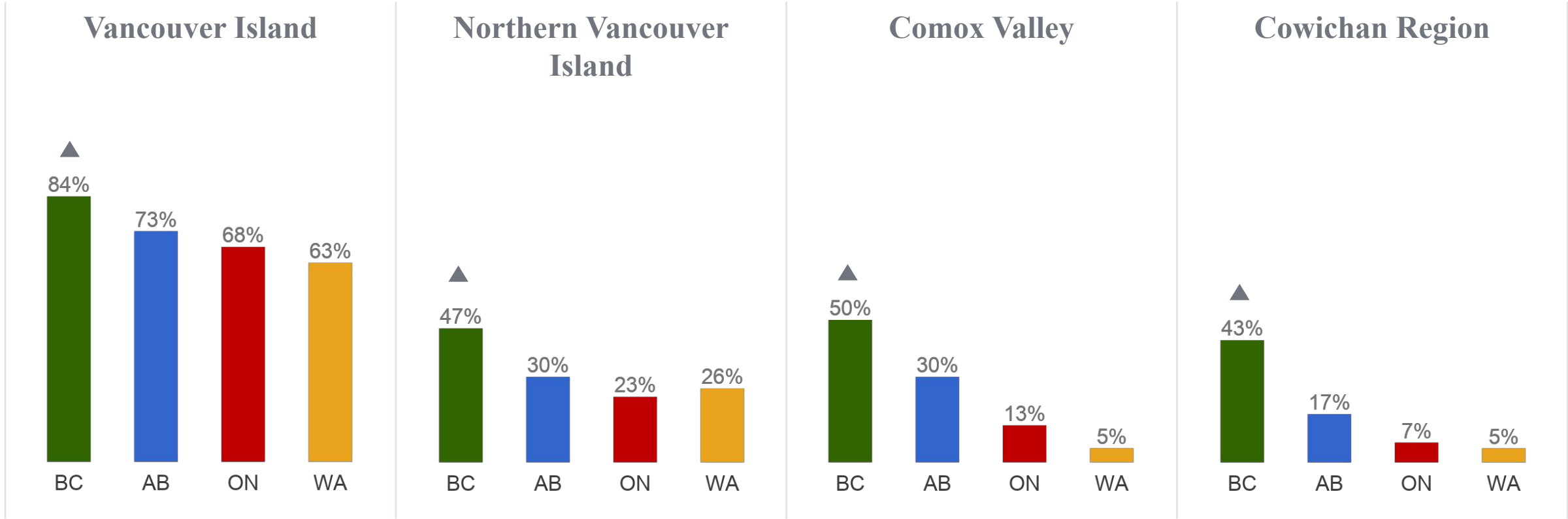
Q20. How familiar are you with the following places, cities or regions as a travel destination? Base: Aware of Vancouver Island (BC n=954, AB n=943, ON n=937, WA n=751), Base: Aware of Northern Vancouver Island (BC n=672, AB n=437, ON n=321, WA n=307), Base: Aware of Comox Valley (BC n=719, AB n=492, ON n=213, WA n=55*), Base: Aware of Cowichan Region (BC n=644, AB n=279, ON n=118, WA n=61*)

▲ = higher than other regions
▼ = lower than other regions

There is interest to travel to VI among all travellers, especially among BC travellers. Interest in the 3 regions is much lower, due to lower awareness

Interest to travel (among all)

very + somewhat



Q22. How interested would you be in travelling to the following for leisure in the next 2 years or so? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

▲ = higher than other regions
▼ = lower than other regions

Expense it the top reason for *not* being interested in travelling to Vancouver Island, especially among Alberta and Ontario travellers

WHY	British Columbia	Alberta	Ontario	Washington
INTERESTED ... (among interested)	- Want to explore (12%) - Close by (11%) - Like it (9%) - Beautiful (8%) - Visit family (8%)	- Beautiful place (12%) - Visit family (10%) - Like it (8%) - Visit friends (8%) - On travel list (7%)	- Beautiful place (13%) - Curious, never been (12%) - On travel list (11%) - Visit family (8%) - Like it (8%) - Want to explore (8%)	- Beautiful place (16%) - Close by (16%) - Fun (8%) - Like it (7%) - Curious, never been (7%) - Want to explore (7%)
NOT... (among not interested)	- Expensive (17%) - Ferry is a hassle (13%) - Already been there (12%) - Just not interested (7%) - Want to go elsewhere (6%)	- Expensive (34%) - Already been there (12%) - Just not interested (10%) - Want to go elsewhere (9%) - Too far (6%) - Too busy (6%)	- Expensive (26%) - Want to go elsewhere (17%) - Just not interested (12%) - Already been there (9%) - Too far (9%)	- Just not interested (17%) - Expensive (12%) - Want to go elsewhere (11%) - Already been there (7%)

Q23. Why are you [INSERT ANSWER FROM Q22 FOR VANCOUVER ISLAND] in travelling to Vancouver Island for leisure in the next 2 years or so? Base: Aware of Vancouver Island and interested (BC n=853, AB n=746, ON n=717, WA n=632), Base: Aware of Vancouver Island and not interested (BC n=101, AB n=197, ON n=220, WA n=119)

Impressions & Associations

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Vancouver Island is seen as a great travel destination, especially in the summer – it’s safe, welcoming and easy to get around

Is a safe place to travel	TRUE 94%	• True for all groups
Is welcoming to people of all backgrounds and ethnicities	TRUE 92%	• True for all groups
Is a great place to visit with children	TRUE 85%	• True for all groups
Would be a great travel destination for me	TRUE 83%	• True for all groups
Is easy to get around once there	TRUE 77%	• True for all groups
Is more of a summer destination	TRUE 68%	• Older travellers (55+) in BC (58%) and ON (51%) are less likely say this is true and therefore do not necessarily see VI as more of a summer destination

Q28. To the best of your knowledge, are the following statements about Vancouver Island TRUE or FALSE? Base: Aware of Vancouver Island (Total n=3585, BC n=954, AB n=943, ON n=937, WA n=751)

However, some have concerns around ease of getting there, affordability and the weather - especially those in Alberta and Ontario

Is easy to get to	TRUE 61% FALSE 39%	- WA travellers (72%) are most likely to say this true - BC (61%), ON (59%), AB (56%)
Has unpredictable weather	TRUE 59% FALSE 41%	Fairly split for all regions
Is typically rainy and cloudy	TRUE 57% FALSE 43%	- BC (48%) travellers are least likely to say this is true - AB (61%), ON (61%), WA (60%) - This is more true for 18-34 years olds across all regions – ON (73%), WA (73%), BC (67%), AB (67%)
Is an affordable place to travel	TRUE 51% FALSE 49%	- WA travellers (74%) are most likely to say this is true - BC travellers (58%) are also more likely to say this is true – especially 18–34-year-olds (66%) - ON (39%), AB (36%)
Puts too much focus on being green/environmentally friendly	TRUE 31% FALSE 69%	- AB travellers (39%) are most likely to say this true - ON (32%), BC (28%), WA (25%)

Q28. To the best of your knowledge, are the following statements about Vancouver Island TRUE or FALSE? Base: Aware of Vancouver Island (Total n=3585, BC n=954, AB n=943, ON n=937, WA n=751)

There are many activities that travellers enjoy doing that are also associated with VI, primarily eating out, beaches and parks. Theater is one that should be showcased more

Enjoy AND Associate with VI
(aligned)
= **continue showcasing**

- Eating out (BC, AB, ON, WA)
- Beaches (BC, AB, ON, WA)
- Parks (BC, AB, ON, WA)

- Historical sites (BC, AB, ON, WA)
- Hiking (BC, AB, ON, WA)
- Farmer’s markets (BC, AB, ON, WA)
- Festivals (BC, AB, ON, WA)
- Shopping (BC, AB, ON, WA)
- Museums (BC, AB, WA)
- Whale watching (WA)
- Camping (WA)

Enjoy BUT Not associate with VI
(not aligned)
= **showcase *more***

- Theatre (BC, AB, ON, WA)

- Museums (ON)

Do not enjoy BUT Associate with VI
(not aligned)
= **showcase *less***

- Golfing (BC, AB, ON, WA)
- Fishing (BC, AB, ON, WA)
- Biking (BC, AB, ON, WA)
- Indigenous experiences (BC, AB, ON)

- Outdoor adventures (BC, AB, ON)
- Boating (BC, AB, ON)
- Art galleries (AB)
- Camping (ON)
- Guided tours (WA)

Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (BC n=949, AB n=934, ON n=937, WA n=747)

Vancouver Island – Top 10 Words (unaided top of mind)

Total	British Columbia	Alberta	Ontario	Washington
• beautiful • ferries • ocean • expensive • Victoria • water • nature • beach • peaceful • fun	• ferries • beautiful • Victoria • ocean • nature • beach • expensive • scenic • peaceful • quiet	• beautiful • expensive • ocean • ferries • Victoria • rain • water • beach • nature • green	• beautiful • expensive • Victoria • water • ocean • ferries • rain • peaceful • nature • island	• beautiful • water • fun • island • Victoria • ferries • pretty • beach • nature • scenic

bold = different from total

Q15. What three words first come to mind when you think of Vancouver Island? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Northern Vancouver Island – Top 10 Words (unaided top of mind)

Total	British Columbia	Alberta	Ontario	Washington
• remote • beautiful • wild • fishing • ocean • nature • rugged • trees • fun • cold	• remote • wild • rain • fishing • beautiful • ocean • rugged • cold • scenic • quiet	• remote • beautiful • fishing • ocean • nature • wild • rain • trees • expensive • rugged	• beautiful • remote • wild • ocean • nature • fun • rugged • mountains • nice • expensive	• beautiful • water • fun • cold • remote • wild • green • fishing • trees • beach

bold = different from total

Q17. What three words first come to mind when you think of Northern Vancouver Island? Base: Aware of Northern Vancouver Island (BC n=655, AB n=429, ON n=307, WA n=284)

Comox Valley – Top 10 Words (unaided top of mind)

Total	British Columbia	Alberta	Ontario	Washington
• beautiful • nature • ocean • beach • quiet • peaceful • trees • military • green • small	• beach • beautiful • ocean • nature • small • trees • skiing • quiet • military • water	• beautiful • peaceful • ocean • quiet • expensive • green • fishing • trees • nature • beach	• beautiful • nature • military • quiet • nice • natural • peaceful • green • mountains • expensive	• *

bold = different from total

Q18. What three words first come to mind when you think of Comox Valley? Aware of Comox Valley (BC n=708, AB n=489, ON n=202, WA n=49*) *Small base size

Cowichan Region – Top 10 Words (unaided top of mind)

Total	British Columbia	Alberta	Ontario	Washington
- lake - beautiful - wine - Indigenous - trees - nature - Duncan - farms - quiet - small	- lake - wine - Indigenous - Duncan - beautiful - quiet - farms - small scenic - trees	- lake - beautiful - trees - nature - Indigenous expensive ocean nice - small sweaters	- beautiful - Indigenous - nature - lake peaceful Victoria green nice water forest	*

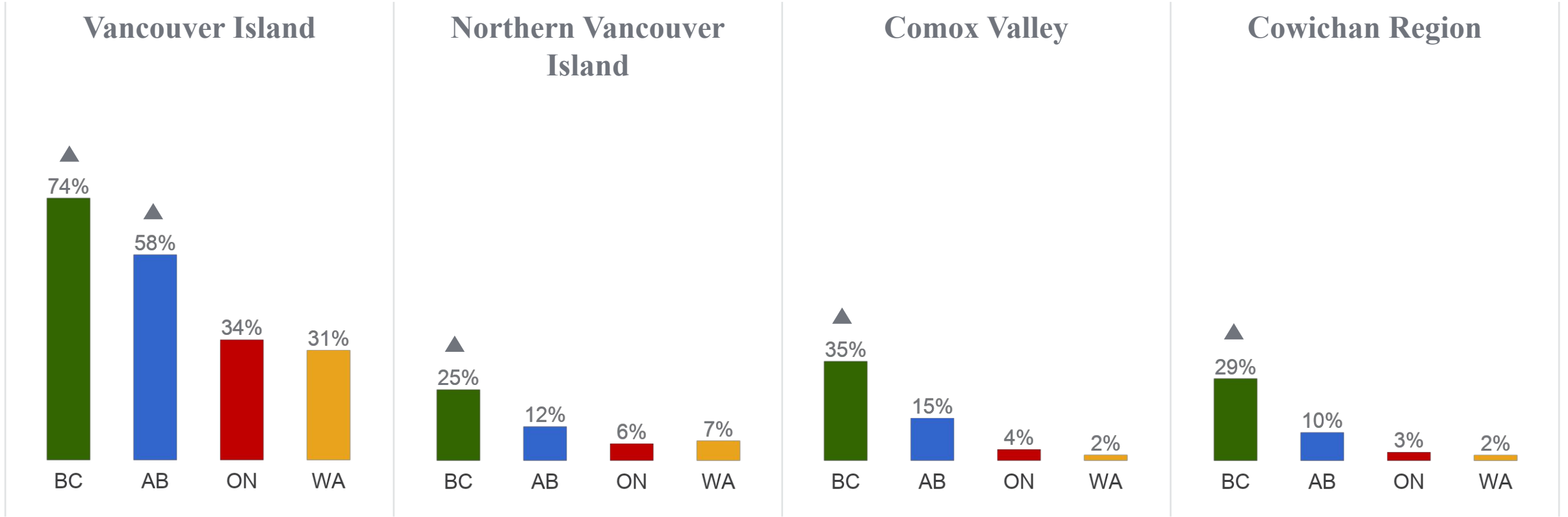
bold = different from total

Q19. What three words first come to mind when you think of Cowichan Region? Aware of Cowichan Region (BC n=632, AB n=276, ON n=112, WA n=54*) *Small base size

Past Visitors

Most British Columbia travellers have visited Vancouver Island, as have many Alberta travellers, yet few travellers from Ontario and Washington have

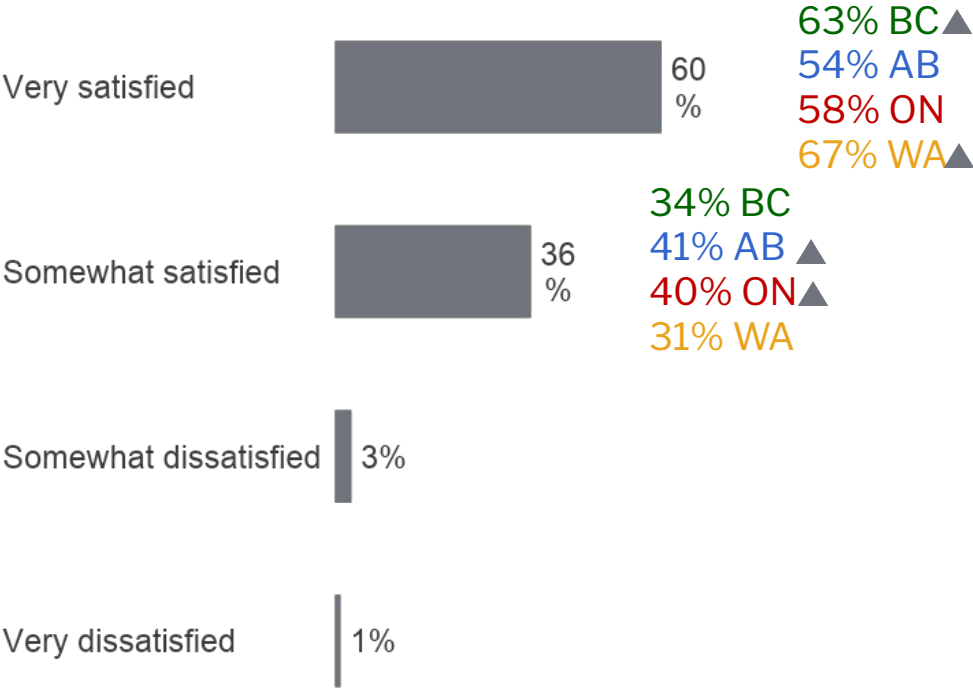
yes



Q21. Have you ever travelled to the following places, cities or regions for leisure? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

▲ = higher than other regions
▼ = lower than other regions

Most Vancouver Island visitors report being satisfied with their visit, especially British Columbia and Washington travellers who were more likely to be very satisfied



Why very satisfied

- It's a fun place (21%)
- Nice to visit friends/family (15%)
- It's a good place to visit (13%)
- It's beautiful (11%)
- The scenery (9%)
- The attractions (8%)
- Good weather (8%)
- Lots to do (7%)
- Good food (6%)
- Friendly people (6%)

Why somewhat satisfied

- It's expensive (12%)
- It's a fun place (10%)
- It's a good place to visit (9%)
- Didn't spend enough time (8%)
- Nice to visit friends/family (7%)
- Dislike the ferry (5%)
- Bad weather (5%)

▲ = higher than other regions
▼ = lower than other regions

Q29. How would you rate your most recent visit to Vancouver Island? Base: Have visited Vancouver Island, Northern Vancouver Island, Comox Valley Or Cowichan Region (BC n=789, AB n=628, ON n=376, WA n=338)
Q30. Please tell us why you were [INSERT ANSWER FROM Q29] with your most recent visit to Vancouver Island?

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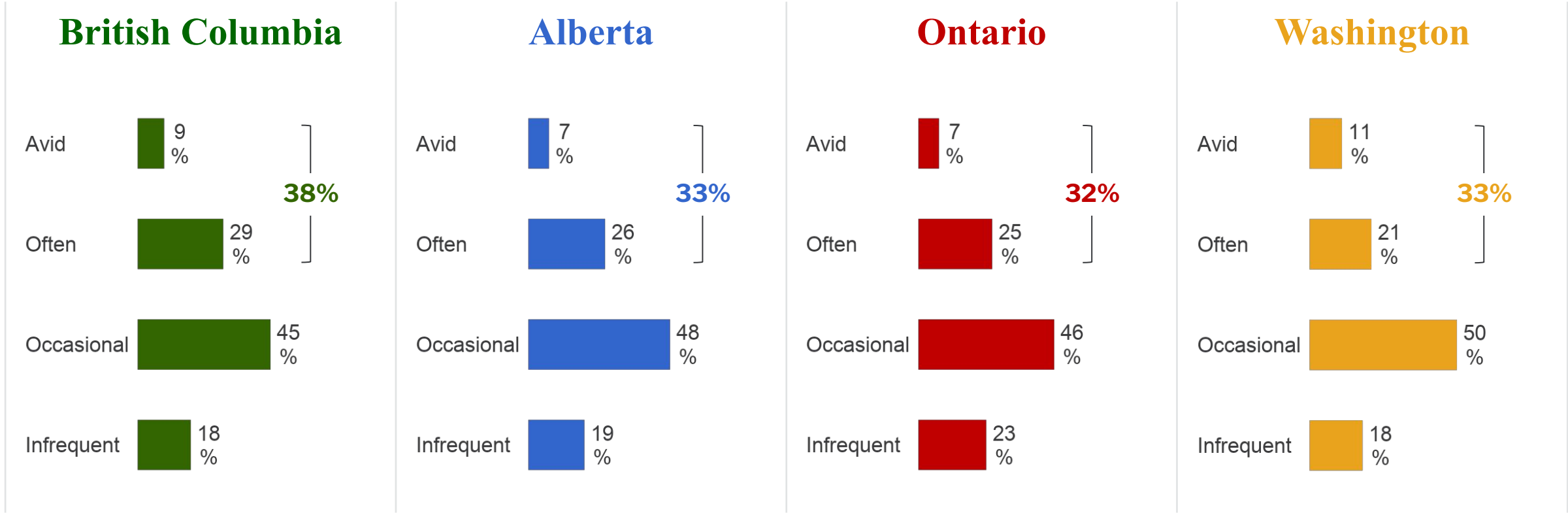
Thank You.

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Appendix: Travel Behaviour

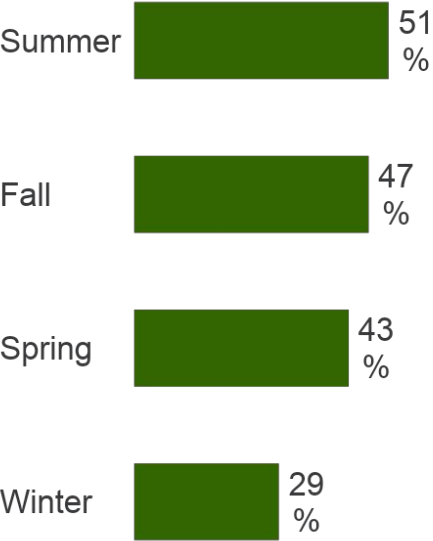
Type of Leisure Traveller



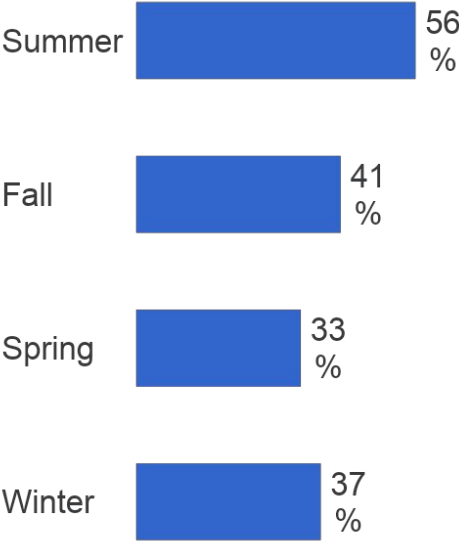
Q6. Which of the following statements best describes the type of leisure traveller you are? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Preferred Travel Seasons

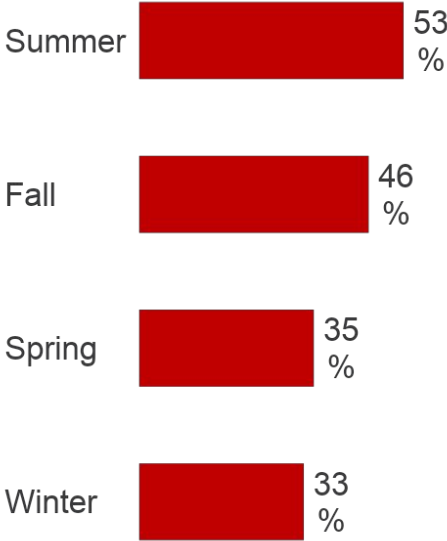
British Columbia



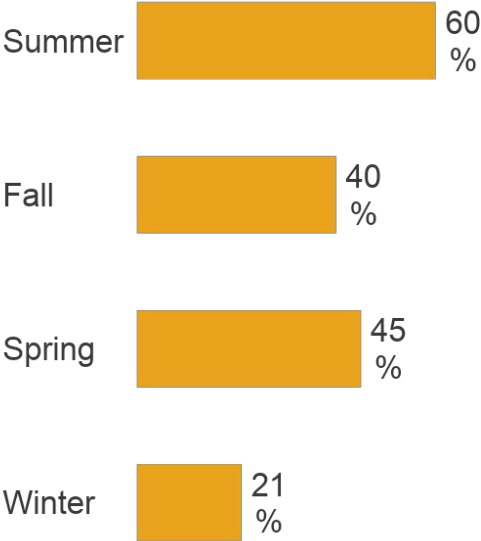
Alberta



Ontario



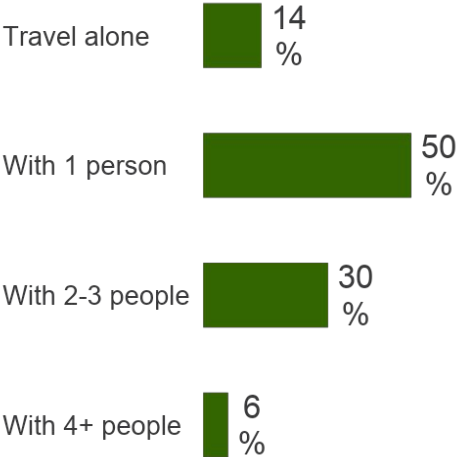
Washington



Q7. When do you enjoy travelling for leisure most? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

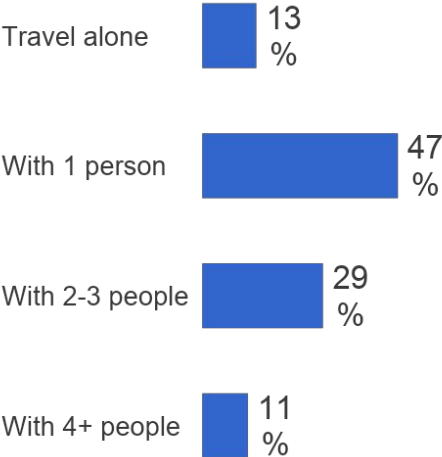
Travel Companions and Spend

British Columbia



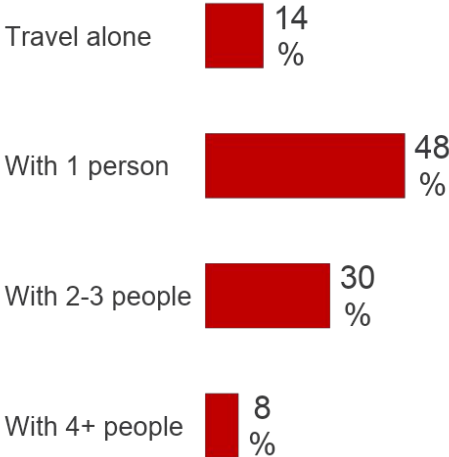
\$971 Average Spend (per person, per trip)*

Alberta



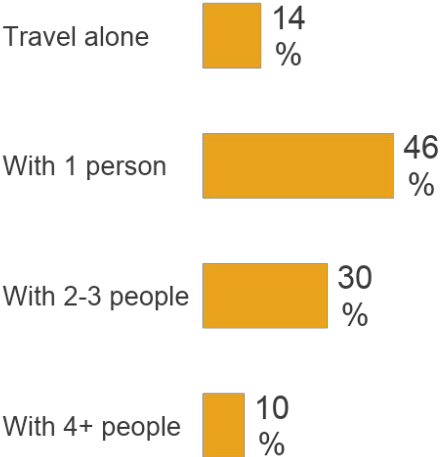
\$912 Average Spend (per person, per trip)*

Ontario



\$903 Average Spend (per person, per trip)*

Washington



\$665 Average Spend (per person, per trip)*
\$871 CAD (September 2022)

*calculation outlined on next slide

Q8. How many other people do you typically travel with? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Q9. How much do you typically budget when you travel for leisure (including travel, accommodations, food and all activities)? Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Q9a. How many people did you include in the above budget. Base: All respondents (BC n=1010, AB n=1012, ON n=1049, WA n=1005)

Spend (Calculation Outlined)

Q9 amounts used

Under \$500 = 250

\$500 to under \$1000 = 750

\$1,000 to under \$2,000 = 1500

\$2,000 to under \$3,000 = 2500

\$3,000 to under \$4,000 = 3500

\$4,000 to under \$5,000 = 4500

\$5,000 or more = 5500

Q9s amounts used

0 = 1

1 = 2

2 = 3

3 = 4

4 = 5

5 = 6

6 = 7 etc.

**Approximate pre person
spend**

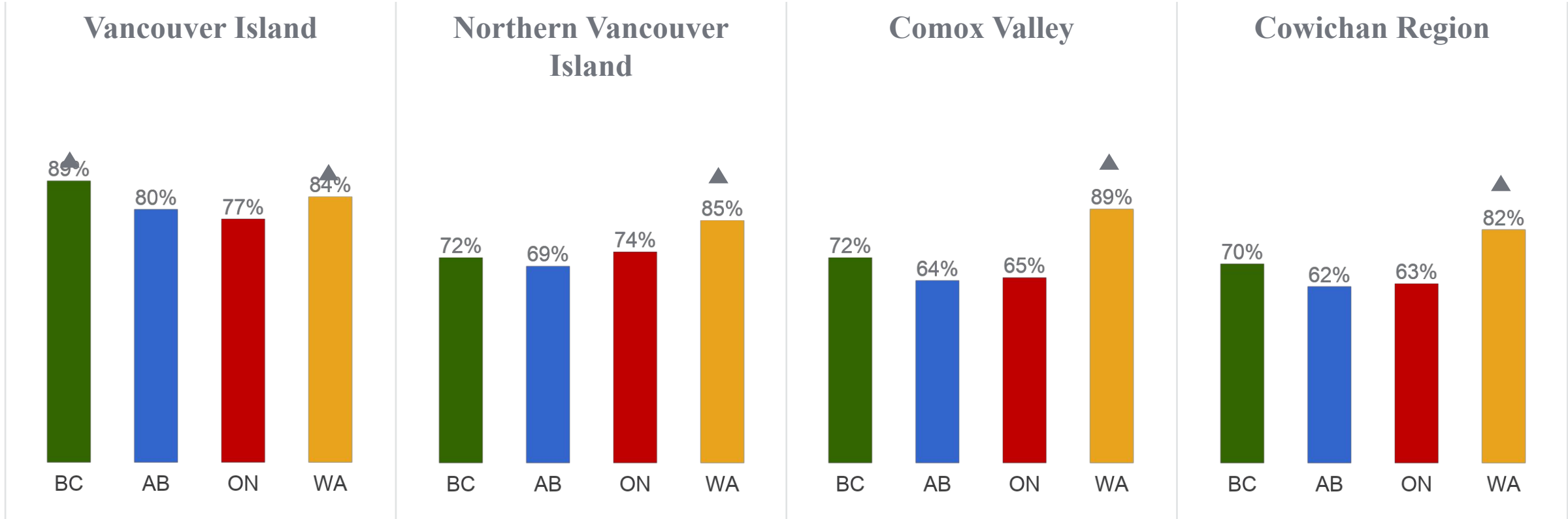
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Q9 / Q9a

There is interest to travel to Vancouver Island and the three regions among those that are aware, especially among Washington travellers

Interest to travel (among aware)

very + somewhat



Q22. How interested would you be in travelling to the following for leisure in the next 2 years or so? Base: Aware of Vancouver Island (BC n=954, AB n=943, ON n=937, WA n=751), Base: Aware of Northern Vancouver Island (BC n=672, AB n=437, ON n=321, WA n=307), Base: Aware of Comox Valley (BC n=719, AB n=492, ON n=213, WA n=55*), Base: Aware of Cowichan Region (BC n=644, AB n=279, ON n=118, WA n=61*)

▲ = higher than other regions
▼ = lower than other regions

Northern Vancouver Island – Reasons to travel and not travel

WHY	British Columbia	Alberta	Ontario	Washington
INTERESTED ... (among interested)	- to explore - it's beautiful - love it - go fishing - it's nice	- it's beautiful - love it - new place to visit - it's nice - to explore	- love it - to explore - it's beautiful - it's nice	- it's beautiful - new place to visit - love it - it's fun
NOT... (among not interested)	- too far - not interested - too remote - too expensive - ferry	- too expensive - too far - too remote - rather go elsewhere	- too expensive - not interested	not interested

Q24. Why are you [INSERT ANSWER FROM Q22] in travelling to Northern Vancouver Island for leisure in the next 2 years or so? Base: Aware of Northern Vancouver Island (BC n=672, AB n=437, ON n=321, WA n=307)

Comox Valley – Reasons to travel and not travel

WHY	British Columbia	Alberta	Ontario	Washington
INTERESTED ... (among interested)	- visit friends/family - to explore - it's nice - it's beautiful - it's close	- visit friends/family - it's beautiful - it's nice - new place to visit - to explore	- visit friends/family - love it - it's beautiful - to explore - it's nice	*
NOT... (among not interested)	- rather go elsewhere - not interested	- too expensive - rather go elsewhere - not interested - too far - boring	- not interested - too expensive - rather go elsewhere	*

Q25. Why are you [INSERT ANSWER FROM Q22] in travelling to Comox Valley for leisure in the next 2 years or so? Base: Aware of Comox Valley (BC n=719, AB n=492, ON n=213, WA n=55*) *Sample too small

Cowichan Region – Reasons to travel and not travel

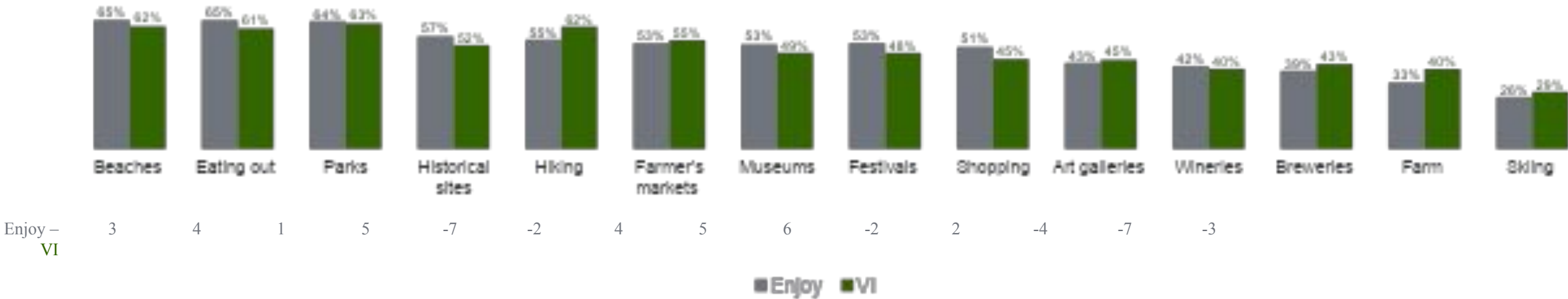
WHY	British Columbia	Alberta	Ontario	Washington
INTERESTED ... (among interested)	- to explore - visit friends/family - love it - it's nice - it's beautiful	- visit friends/family - it's beautiful - it's nice - to explore - love it	- visit friends/family - love it - it's beautiful - new place to visit	*
NOT... (among not interested)	- rather go elsewhere - not interested - boring	- too expensive - rather go elsewhere	- too expensive - not interested - rather go elsewhere	*

Q26. Why are you [INSERT ANSWER FROM Q22] in travelling to Cowichan Region for leisure in the next 2 years or so? Base: Aware of Cowichan Region (BC n=644, AB n=279, ON n=118, WA n=61*) *Sample too small

Appendix: Enjoyment vs. Association with Vancouver Island

Enjoyment vs. Association with Vancouver Island (Implicit)

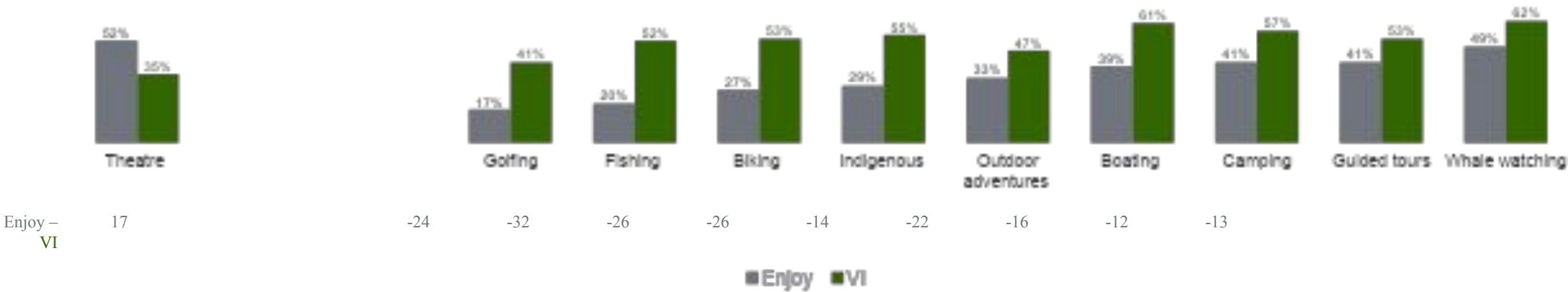
British Columbia
Aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (BC n=1010)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (BC n=954)

Enjoyment vs. Association with Vancouver Island (Implicit)

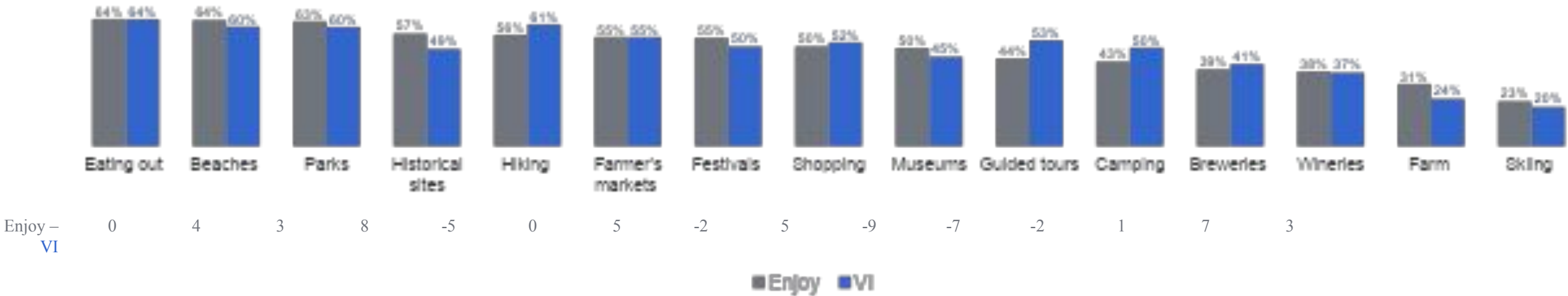
British Columbia
Not aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (BC n=1010)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (BC n=954)

Enjoyment vs. Association with Vancouver Island (Implicit)

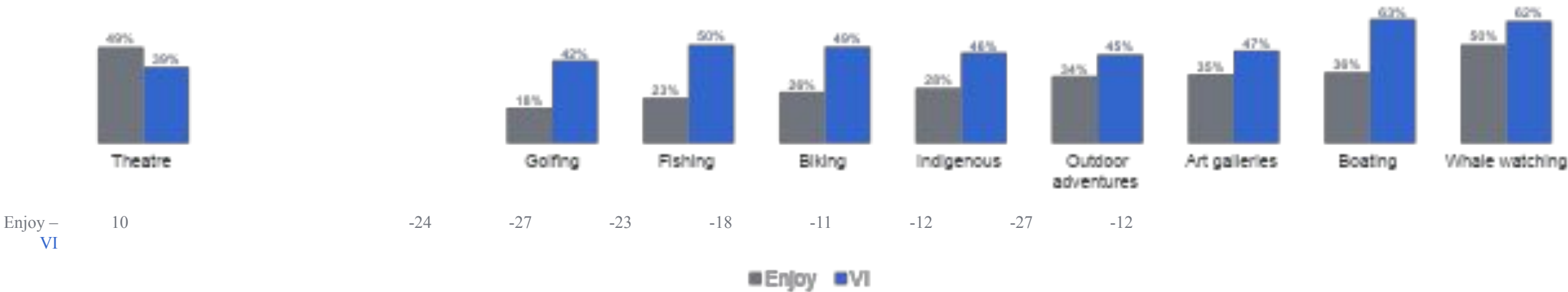
Alberta
Aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (AB n=1012)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (AB n=943)

Enjoyment vs. Association with Vancouver Island (Implicit)

Alberta
Not aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (AB n=1012)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (AB n=943)

Enjoyment vs. Association with Vancouver Island (Implicit)

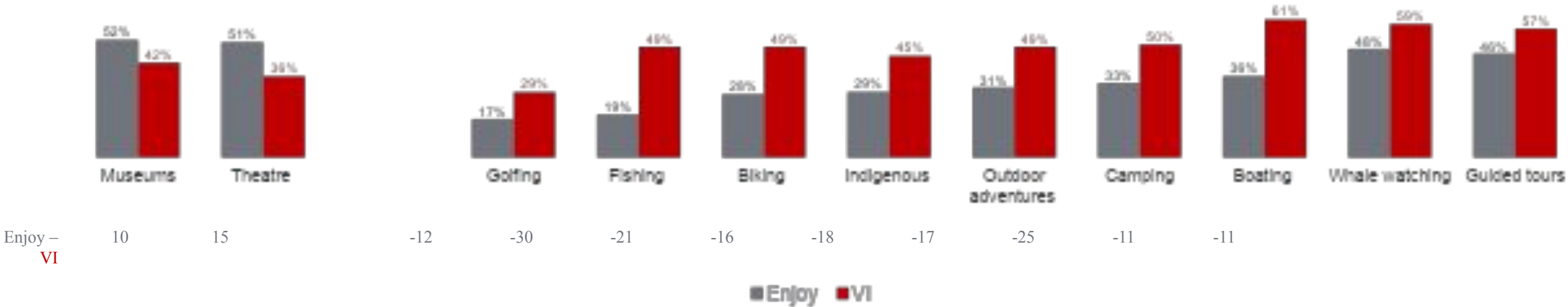
Ontario
Aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (ON n=1049)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (ON n=937)

Enjoyment vs. Association with Vancouver Island (Implicit)

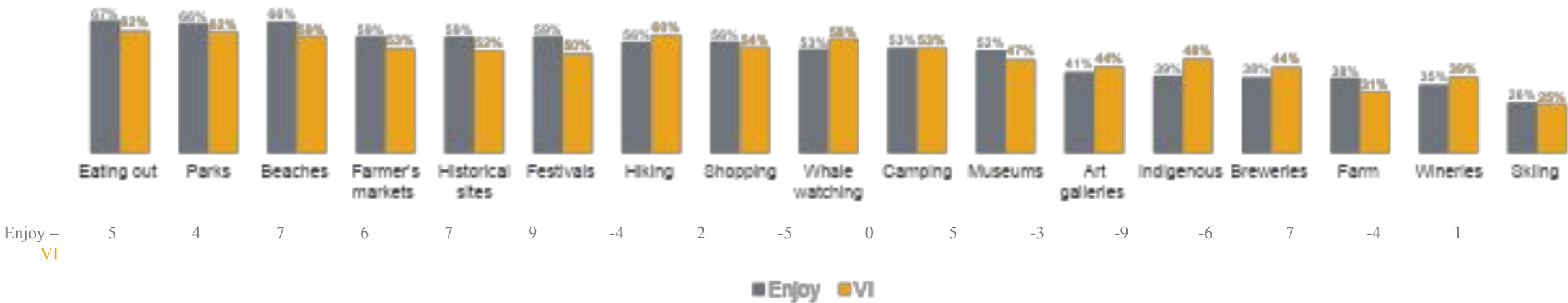
Ontario
No aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (ON n=1049)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (ON n=937)

Enjoyment vs. Association with Vancouver Island (Implicit)

Washington
Aligned

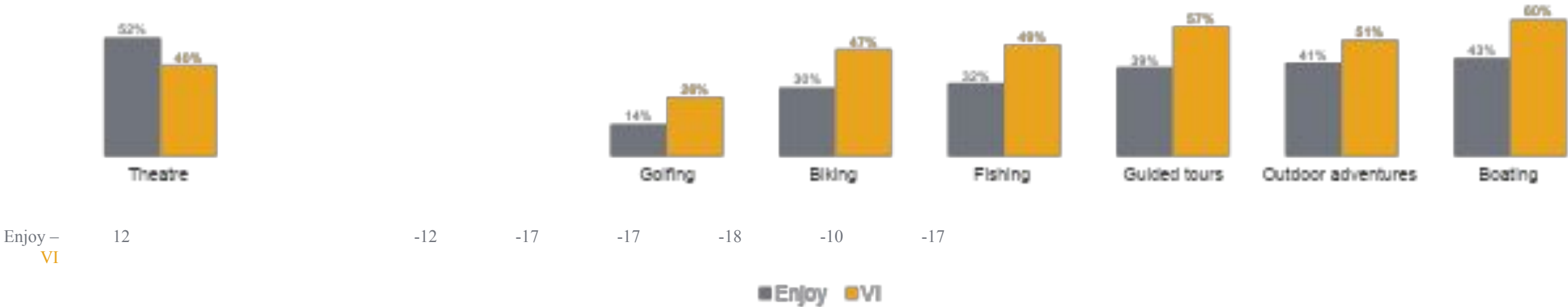


Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (WA n=1005)

Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (WA n=751)

Enjoyment vs. Association with Vancouver Island (Implicit)

Washington
Not aligned



Q11. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'DO enjoy doing when travelling' and 'DO NOT enjoy doing when travelling'. Base: All respondents (WA n=1005)
Q27. In the next question, you will be shown a series of items which we'd like you to sort into two buckets – 'Vancouver Island' and 'NOT Vancouver Island'. Base: Aware of Vancouver Island (WA n=751)



By Awareness of 3 Regions

maru/
The experience & insights platform

Awareness levels for each region are very much correlated and there is duplication within the 3 groups. Therefore, any analysis comparing the three groups will have minimal differences, as shown on the following slides

	British Columbia			Alberta			Ontario			Washington		
	Aware of...			Aware of...			Aware of...			Aware of...		
	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region
Northern VI	100%	80%	83%	100%	56%	66%	100%	52%	64%	100%	*	*
Comox Valley	84%	100%	93%	61%	100%	82%	34%	100%	58%	12%	*	*
Cowichan Region	79%	83%	100%	41%	47%	100%	24%	32%	100%	13%	*	*

Q16. Which of the following places, cities or regions on Vancouver Island are you aware of? Base: Aware of Northern Vancouver Island (BC n=672, AB n=437, ON n=321, WA n=307), Aware of Comox Valley (BC n=719, AB n=492, ON n=213, WA n=55*), Aware of Cowichan Region (BC n=644, AB n=279, ON n=118, WA n=61*) *Small base size

Beach towns are top destinations for all regions (regardless of which region they are aware of), with mountains second for AB and WA, and small towns for BC and ON

	British Columbia			Alberta			Ontario			Washington		
	Aware of...			Aware of...			Aware of...			Aware of...		
	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region
Beach towns/areas	63%	63%	63%	65%	62%	61%	56%	54%	51%	77%	*	*
Mountain towns/areas	53%	52%	52%	64%	63%	64%	47%	47%	42%	62%	*	*
Small cities and towns	57%	55%	56%	46%	43%	48%	50%	53%	49%	49%	*	*
Resorts	39%	38%	37%	43%	42%	38%	44%	37%	34%	41%	*	*
Large metropolitan cities	46%	46%	44%	41%	40%	41%	43%	42%	48%	35%	*	*
Countryside/rolling hills	40%	40%	41%	37%	37%	37%	42%	46%	39%	42%	*	*
Remote wilderness areas	31%	30%	31%	27%	27%	27%	31%	27%	27%	41%	*	*
Cruises	25%	23%	23%	24%	22%	26%	23%	25%	24%	23%	*	*

Q10. When travelling for leisure, what types of places do you most enjoy? Base: Aware of Northern Vancouver Island (BC n=672, AB n=437, ON n=321, WA n=307), Aware of Comox Valley (BC n=719, AB n=492, ON n=213, WA n=55*), Aware of Cowichan Region (BC n=644, AB n=279, ON n=118, WA n=61*) *Small base size

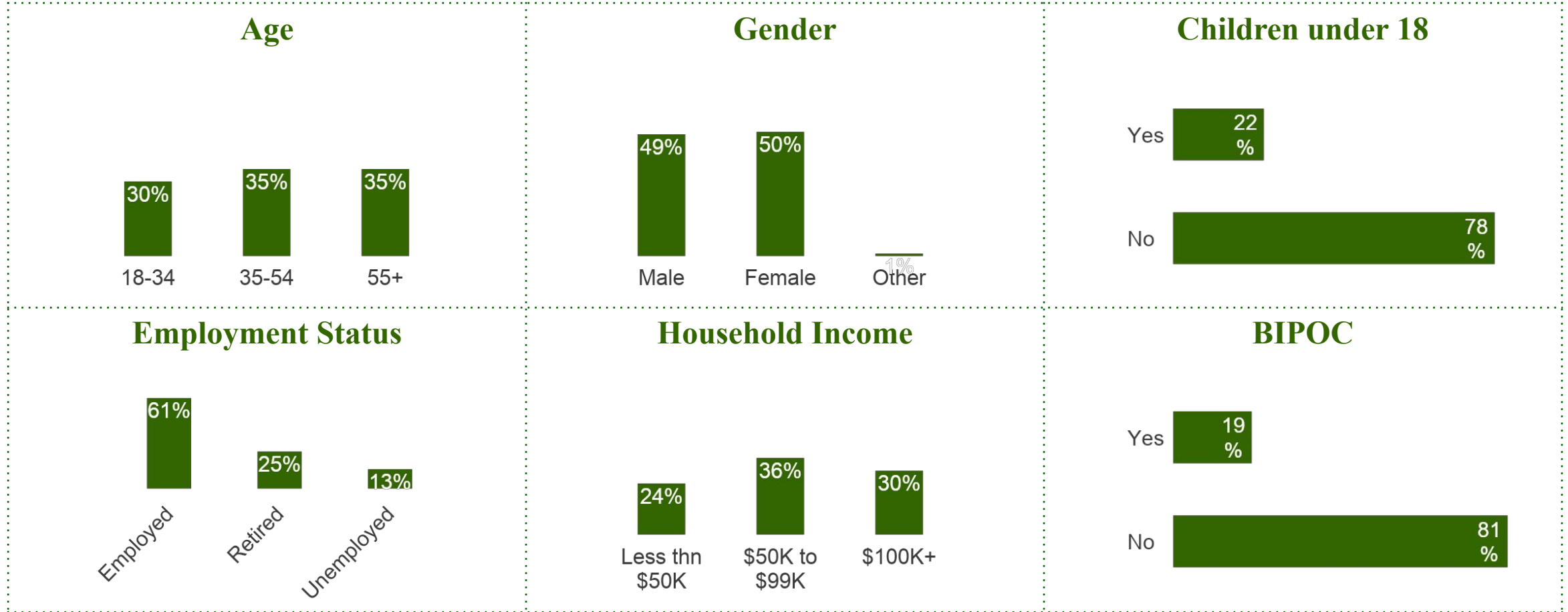
Vancouver Island is seen as a great travel destination with some concerns around affordability and the weather (regardless of which region they are aware of)

TRUE Vancouver Island is...	British Columbia			Alberta			Ontario			Washington		
	Aware of...			Aware of...			Aware of...			Aware of...		
	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region	Northern VI	Comox Valley	Cowichan Region
Safe	96%	96%	96%	95%	93%	96%	94%	95%	96%	94%	*	*
Welcoming	92%	92%	93%	93%	90%	91%	93%	93%	88%	96%	*	*
Visit with children	91%	91%	92%	88%	86%	87%	87%	85%	80%	85%	*	*
Destination for me	87%	89%	88%	85%	82%	83%	85%	80%	80%	91%	*	*
Easy to get around	79%	80%	81%	74%	75%	75%	80%	82%	81%	80%	*	*
Summer destination	63%	63%	61%	68%	68%	63%	66%	59%	54%	64%	*	*
Easy to get to	63%	62%	63%	60%	53%	53%	67%	59%	60%	73%	*	*
Unpredictable weather	54%	55%	56%	65%	62%	57%	57%	53%	53%	64%	*	*
Rainy and cloudy	42%	43%	41%	60%	60%	50%	59%	53%	42%	63%	*	*
Affordable	59%	57%	58%	38%	36%	38%	49%	43%	46%	76%	*	*
Focus on being green	24%	24%	24%	40%	40%	43%	38%	36%	29%	30%	*	*

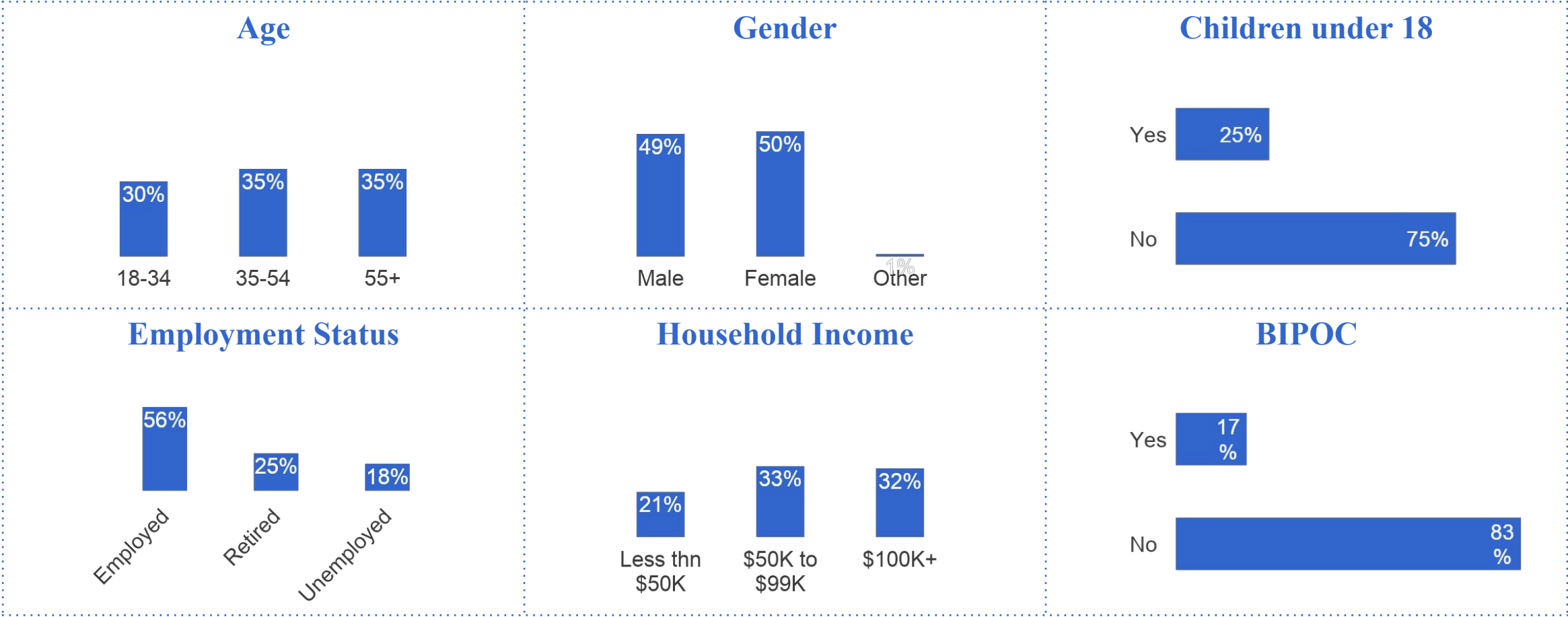
Q28. To the best of your knowledge, are the following statements about Vancouver Island TRUE or FALSE? Base: Aware of Northern Vancouver Island (BC n=655, AB n=429, ON n=307, WA n=284), Aware of Comox Valley (BC n=708, AB n=489, ON n=202, WA n=49*), Aware of Cowichan Region (BC n=632, AB n=276, ON n=112, WA n=54*) *Small base size

Appendix: Respondent Profile

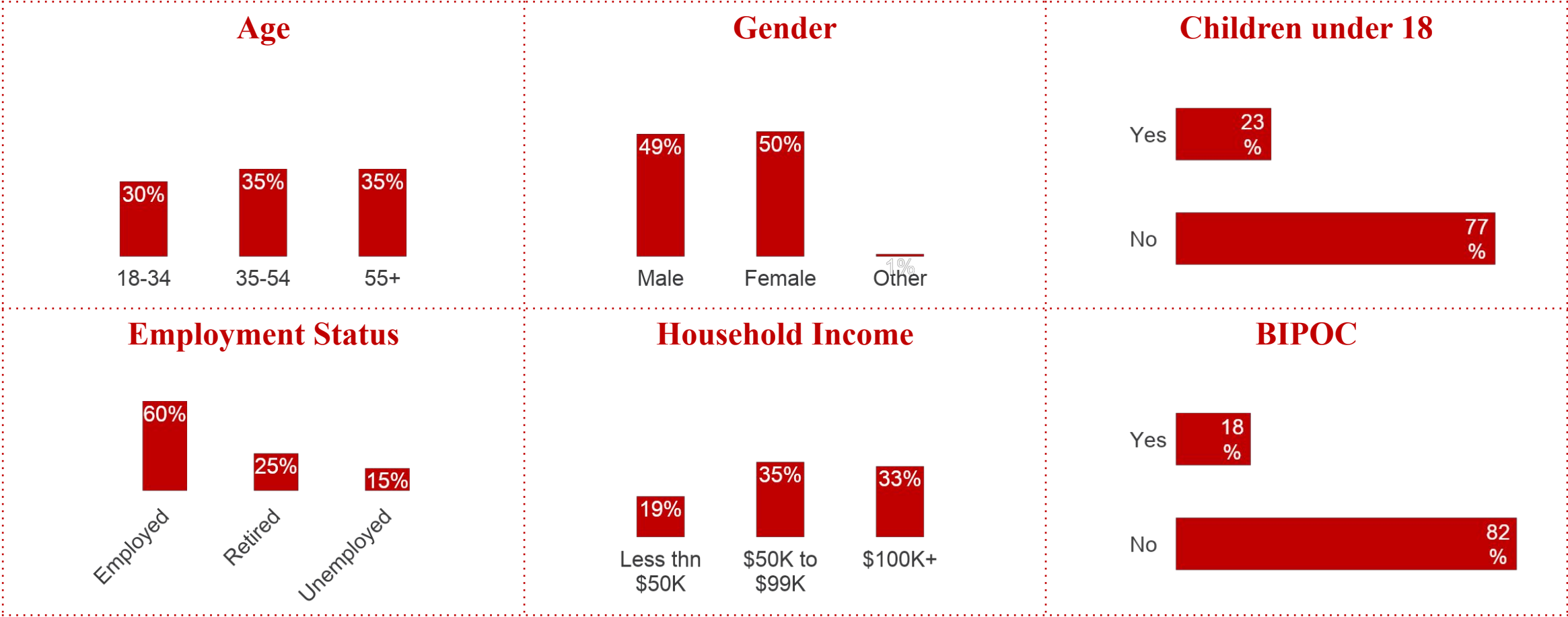
British Columbia – Respondent Profile



Alberta – Respondent Profile



Ontario – Respondent Profile



Washington – Respondent Profile

