

Tourism Vancouver Island Positioning Study - Summary

Cowichan | Comox Valley | Vancouver Island North

Introduction

To extract unique characteristics and 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). The three regions were positioned against each other as part of the survey in an attempt to pull out key differentiating factors.

Methodology

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

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

Results were weighted by age and gender within each region. The survey was conducted in English and French.

Considerations

While the questions of this survey were positioned to obtain perspectives during a 'typical travel year', the following issues, outside of our control, should be considered:

- Globally, we are still recovering from the pandemic. Confidence and willingness to travel have not yet reached pre-pandemic levels.
- Canada still had random testing and ArriveCan in place at the time of the survey. This could have an impact on an American's willingness to cross the border.
- Over the summer of 2022, airlines and BC Ferries received a lot of negative press as a result of staff challenges and adapting to a higher demand for service.
- Inflation is top of mind, as interest rates and costs continue to rise

Takeaways

There's significant potential to attract travelers from the four target regions to Vancouver Island, particularly from within Canada. Attracting American visitors will be more challenging.

- 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

While Vancouver Island as a travel destination has strong awareness, the three regions do not. British Columbian's have good knowledge, but awareness in the other three regions is poor. For those that were aware of the region, only about half would say they were familiar with them as a travel destination.

- 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

Vancouver Island as a travel destination, regardless of the region, continues to face perception issues around affordability, weather and challenges getting here.

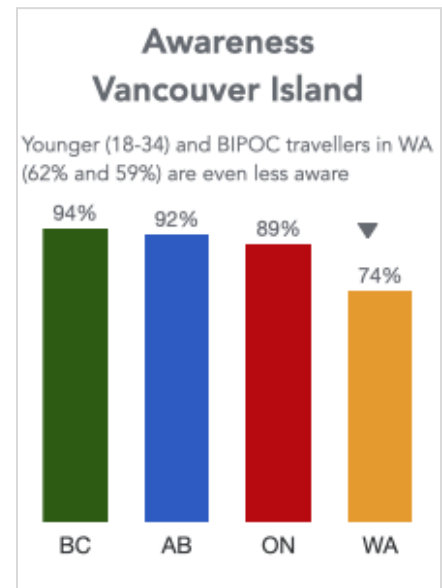
- Travellers are split on affordability, with many ON and AB travellers saying Vancouver Island is *not* an affordable place to travel
- The weather also causes concern for some. Many describe the weather as unpredictable (59%) and rainy (57%) – higher among AB, ON and WA travellers
- Getting there is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

Why Travel to Vancouver Island?

Based on the survey, travellers are coming or plan to come to Vancouver Island (not a specific region on the Island) to visit a beach community and have an opportunity to revive.

Key attributes associated with Vancouver Island (and should not be considered as differentiators for the regions) include:

- Beautiful, scenic
- Ocean, beach
- Expensive
- Nature
- Ferries
- Peaceful
- Hiking



The most recognized community was Victoria.

There's consensus that it's a unique destination within Canada and a place to explore and relax. A lot of the attributes about Vancouver Island as a region were also aspects identified within the regions. Beaches, hiking, nature, beauty, etc are all true of each of the three regions, but not something that make them unique (to our audience) from one another.

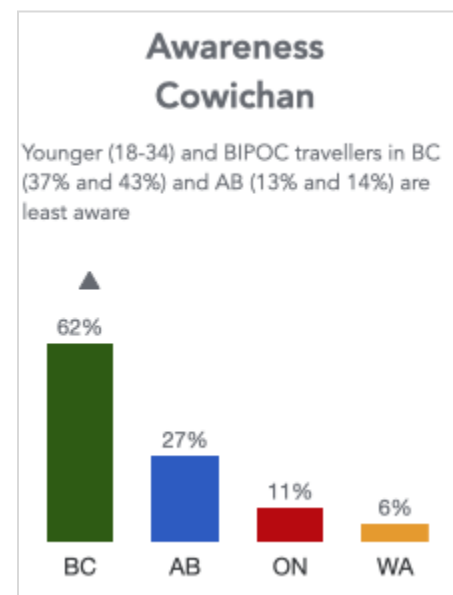
Cowichan

Unfortunately, awareness of Cowichan is low, particularly in Ontario and Washington.

For those with familiarity with Cowichan identified the following attributes:

- Lakes
- Farms, farming
- Indigenous
- Wine, wineries
- Food

Duncan was the only community associated with Cowichan.



There was an interest from travellers to experience live theatre as part of a holiday, however this experience is not generally associated with

Vancouver Island. An opportunity exists for Cowichan to raise awareness of its arts community.

This was the only region where indigenous stood out as a key attribute and it stood out prominently. The popular Cowichan sweater likely plays a large part in this awareness. While it's important to grow these tourism opportunities across all regions, Cowichan may be able to lead this based on the recognition it already has.

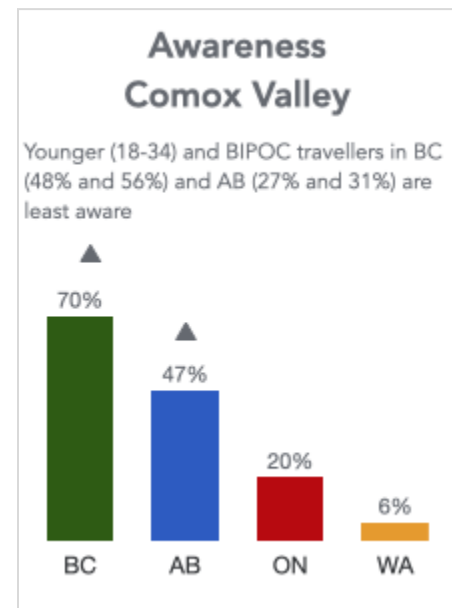
Comox Valley

Unfortunately, awareness of the Comox Valley is low, particularly in Ontario and Washington.

For those with familiarity with the Comox Valley identified the following attributes:

- Trees
- Mountains
- Military
- Skiing
- Airport
- Food

Both Courtney and Comox were associated with being in the region.



Second to beach towns, one of the most prominent destinations to visit on Vancouver Island is mountain towns/areas. With Mount Washington and a rapidly growing mountain biking scene, Comox has an opportunity to stand out to those travellers as they plan their holidays.

Food stood out stronger as a differentiating factor in the Comox Valley meaning their growing culinary scene is having an impact. Allow the restaurants and the tide-to-table / farm-to-fork messaging to shine in marketing materials and look to target more foodies in marketing.

Vancouver Island North

In comparison to the other two regions, there was significantly stronger awareness of the North Island, however, still plenty of opportunity to grow the brand.

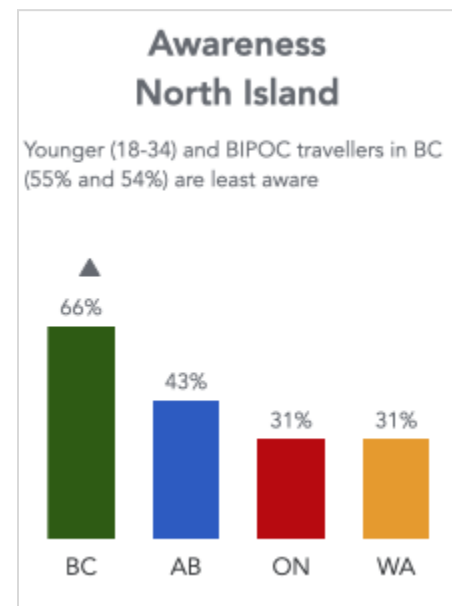
For those with familiarity with the North Island identified the following attributes:

- Remote, isolated
- Fishing
- Wilderness
- Whales
- Rugged, wild

Port Hardy was a community associated with the North Island, and oddly so was Tofino. Well known Telegraph Cove, was not.

The remote and somewhat isolated nature of the North Island continues to be top of mind and could be perceived as a challenge in attracting visitors. It's important to keep in mind there are travellers looking for exactly that, those uncomplicated, seemingly untouched parts of the world that the North Island can offer.

Additionally, although not as strong as other attributes, camping was only affiliated with The North Island when compared to the other regions and specifically targeting campers with campaigns may reach an already interested audience.



Recommendations

- Develop positioning statements that focus on:
 1. Located on Vancouver Island
 2. Unique attributes associated with the region
- Structure messaging hierarchy for all advertising and marketing materials. In target markets (especially outside of British Columbia) lead with 'Vancouver Island' and follow with the region. Example:
 - 'Plan your next wine tour on Vancouver Island. Taste the award winning wines of Cowichan.'
 - 'Escape the crowds and disconnect on Vancouver Island. Experience the rawness of the North Island.'
 - 'Ski and golf the same day on Vancouver Island. Take this year's winter holiday in the Comox Valley.'
- Create a transportation focussed campaign that emphasizes the ease of getting to Vancouver Island. Consider targeted ads in key regions connected via directed flights. Example:
 - 'Fly to Vancouver Island in just over an hour, direct from Calgary. Regularly scheduled flights to Victoria, Nanaimo and Comox.' This could be followed with a regional specific message, raising awareness of both the region and convenience of air travel.

Collective Seasonal Campaign Approach

The lack of awareness of the regions, but the excellent awareness of Vancouver Island stood out as the key take away in this campaign. We have been building campaigns that encourage people to discover a region they've never heard of.

Every season the marketing team at 4VI has been coming up with unique campaign concepts for 3 different regions, when what may actually be more powerful is seasonal Vancouver Island campaigns with region specific imagery, key messages, CTAs and targeting.

For example, inconsistent weather, particularly rain, was a characteristic for the Island and for all regions. The rainy season is a reality and a factor we have little control over. There could be a tongue-in-cheek campaign where Vancouver Island and its stakeholders just own the rain.

- "Yes, it's raining again... but look how green our forests are. Grab your rain jacket and come hike Vancouver Island. Old Baldy Mountain in Cowichan is calling."
- "Yes, it's raining again... but rain and waves sound great together. Put on your rubber boots and explore a beach on Vancouver Island. Cluxewe Beach on the North Island is beautiful right now."
- "Yes, it's raining again... but it's not at the top of the mountain. Grab your mittens and come tubing on Vancouver Island. Mount Washington in the Comox Valley has its snow tubes ready for you!"

For local audience the 'Vancouver Island' component could be dropped, but for anyone out of province, including that sense of location may prove beneficial.

This approach allows us to:

- Leverage the current brand recognition of Vancouver Island to help position the region
- Highlight unique attributes of each of region
- Present a more unified, collective tourism environment on the Island
- Add an optional element where stakeholders can leverage the campaign messaging to be involved

The additional benefit of this approach is internal, allowing a small marketing team to make a big idea go a lot further using fewer resources.