



Vancouver Island Positioning Study

COMOX VALLEY FINDINGS SUMMARY

Objective

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 Columbians 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 VI regions
- AB travellers are less aware of the 3 VI 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

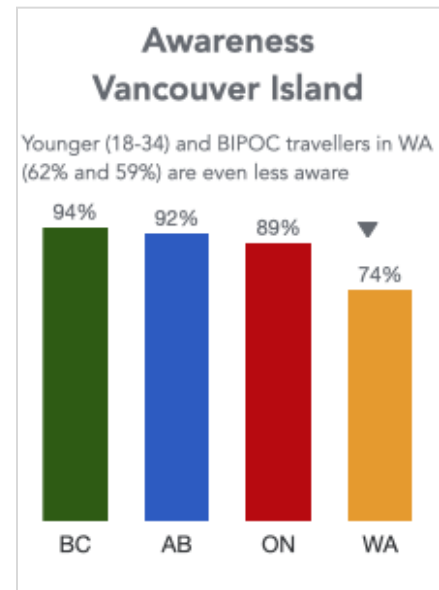
- Getting there is also seen as a challenge for some (39%), again higher among AB, ON and WA travellers

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 VI regions, but not something that makes them unique (to our audience) from one another.**

Comox Valley

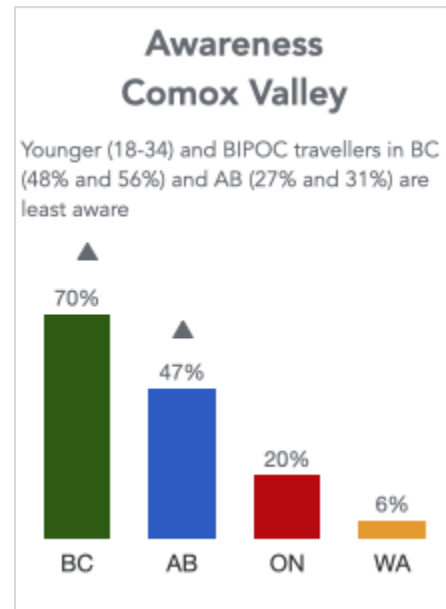
Unfortunately, awareness of the Comox Valley is low, particularly in Ontario and Washington. For those with familiarity with the Comox Valley identified the following attributes:

- 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.





Recommendations

Below are recommendations that Maru/Blue suggests, based on the findings of this positioning study.

- 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:
 - '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 Comox.' This could be followed with a regional specific message, raising awareness of both the region and convenience of air travel.
- 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 rain and waves sound great together. Put on your rubber boots and explore a beach on Vancouver Island. Miracle Beach in Comox Valley 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!"