



## Summer 2022 Abbotsford Visitor Survey Report

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## EXECUTIVE SUMMARY

Tourism Abbotsford recently retained Cadence Strategies to conduct their 5-Year Strategic Plan. During the initial discussions, it was identified that a gap remained relating to primary research on Visitors. As such, the Tourism Abbotsford team decided to proceed with a Visitor Study in the summer of 2022.

Align Consulting Group was engaged to conduct the Visitor Study. The study design was a two-phase approach with an initial intercept survey being conducted by Tourism Abbotsford staff using tablets with an online follow up being sent to those who agreed. In the latter part of the data collection period, a handout was also used to supplement the onsite efforts. Surveying was conducted between July 1 and September 1, 2022 researchers conducted 393 full visitor intercept interviews. A total of 233 visitors agreed to participate in the follow-up questionnaire, of those, of 88 visitors completed the online follow-up survey for a response rate of 38%. The additional handout method garnered 19 more intercept survey completes and 11 follow-up completes.

### Key Findings

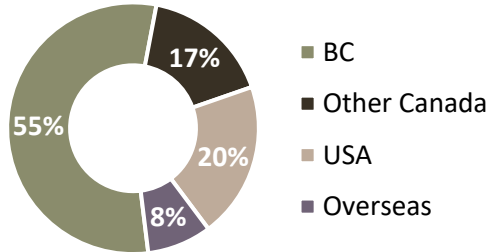
- Day visitors differ from Overnight visitors.
- Visitors are predominantly from BC, in particular Greater Vancouver (29%) and the Fraser Valley (11%). Not surprisingly, Day visitors are significantly more likely to be from Greater Vancouver (46% vs. 12%) and the Fraser Valley (29% vs. 2%), while Overnight visitors are more likely to be from USA (31% vs. 9%), Other Canada (24% vs. 10%) and Other BC – other than Greater Vancouver and Fraser Valley (18% vs. 3%).
- Travel parties most commonly consist of two people and only approximately one-quarter have children under the age of 18 with them. Day visitors are significantly more likely than Overnight visitors to have children in their travel party (36% vs. 18%). The average travel party 2.5 people with 27% including children.
- On average, travel parties spent \$585 while in Abbotsford. Day Visitors spend an average of \$185 while Overnight Visitors average \$922 per party.
- Among those staying overnight, Hotels is the most common accommodation (41%) followed by staying with friends or family (25%). That said, Paid Roof (i.e. Hotel - 41%, Motel – 3%, B&B – 7%, Vacation Rental – 11%) was used by 62% of overnight visitors.
- The primary motivation for visiting Abbotsford is to attend a concert/festival/event or participate in a sporting event (including geocaching). Although there are some differences, overall the primary motivation does not differ significantly between Day Visitors and Overnight Visitors.
- Dining, Shopping and visiting Parks were the top planned activities with Festivals, Fairs or Events, Hiking, Sampling local cuisine / culinary experiences, Shopping, and Visiting friends / relatives being the most common activities visitors did while in Abbotsford.
- There is a large social media opportunity as 40% of visitors shared their Abbotsford experience on social media but did not tag #ExploreAbbotsford or #TheFraserValley. In addition, awareness of the Explore Abbotsford app is negligible which presents an opportunity for Tourism Abbotsford to expand awareness and usage.
- Abbotsford summer visitors were quite satisfied with their overall experience with 92% rating it as ‘somewhat’ or ‘very’ satisfied. Events as well as Restaurants/Dining had high satisfaction levels while Local Transportation and Shopping appear to be areas for improvement.

- Despite nearly half of their visitors being 'Promoters', Abbotsford's Net Promoter Score (NPS) is low at 16.5. Day Visitors dragged the score down with a score of -11.5 compared to +32.2 for Overnight visitors. This reinforces the need to target Day Visitors to move them from Detractors to at minimum Passives but eventually Promoters. Although Overnight visitors had a much healthier NPS, it still leaves notable opportunity for improvement.
- Visitors are satisfied with their trip; however, they are not very likely to recommend Abbotsford as a place to visit. This disconnect led to a low

Net Promoter Score. Some of the barriers to advocating for Abbotsford as a destination is the proximity (for those living in Greater Vancouver and the Fraser Valley) and general lack of awareness of things to do other than the event they may have attended. As such, there may be an opportunity to engage with Visitors as to why word of mouth is important despite close proximity and some familiarity. A targeted campaign building upon key products such as farm tours, craft breweries, or even well-known events may be of benefit.

# ABBOTSFORD – SUMMER 2022 SUMMARY

## Market Origin



## Top Areas of Province

1. Greater Vancouver (29%)
2. Fraser Valley (15%)
3. Other Parts of BC (11%)

## Top 3 Outside BC

1. Alberta (8%)
2. Ontario (6%)
3. Washington State

## Visitors



**2.5** people in each visitor party  
27% travelled with children (< 18)

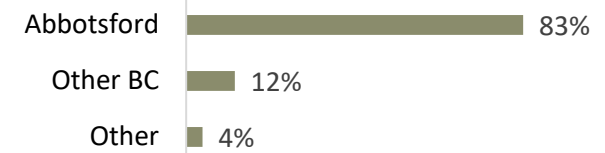
**27%** were between ages of 19-34

**34%** were between ages of 35-54

**39%** were 55 or older

**41%** had HH income of \$100,000+

## Primary Destination



**38%** Considered Other Destinations Like:  
Vancouver, Langley, and Chilliwack.

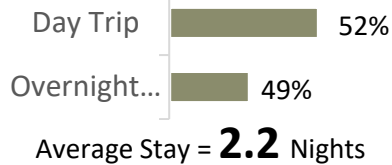
## Repeat Visitors in Past 2 Yr



**\$585** =

average visitor party expenditure in Abbotsford

## Length of Stay



## Top 5 Activities in Abbotsford

(in addition to reasons for visiting)

1. Dining (49%)
2. Shopping (43%)
3. Going to Parks (35%)
4. Hiking (18%)
5. Farmer's Market (17%)

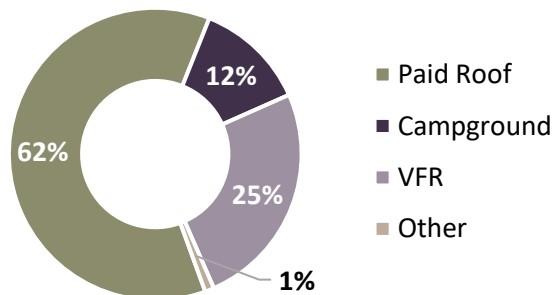
## Downtown Abbotsford

**60%** Visited Historic Downtown

## Top 3 suggestions:

1. Street Festival/Event
2. More Unique Shops
3. More Dining Options

## Accommodations



## Top 5 Reasons for Visiting Abbotsford

1. Attending a Concert/Festival or Sporting Event (26%)
2. Participating in a Sporting Event (24%)
3. Visiting Friends and Relatives (15%)
4. Attending a Private Event (12%)
5. Participate in Outdoor Recreation (12%)

## Experience Evaluation

**92%** are Somewhat/Very Satisfied with Overall Abbotsford Experience

Net Promoter Score (NPS): **16.5**

Likelihood of Return to Abbotsford in next 2 years: **59%** sometime and

**42%** Overnight

	Day Visitors	Overnight Visitors	Total Visitors
<b>Market Origin</b>			
Greater Vancouver	45%	12%	29%
Fraser Valley	29%	2%	15%
Another Part of BC	3%	18%	11%
Other Canada	10%	24%	17%
USA	10%	30%	20%
Overseas	2%	14%	8%
<b>Gender</b>			
Female/Woman/Feminine	63%	66%	64%
Male/Man/Masculine	35%	33%	34%
Non-Binary, Gender Fluid, and/or Two-Spirit	1%	2%	1%
<b>Length of Stay</b>			
Average Nights in Abbotsford	0.0 (6.4 hours)	4.4	2.2
<b>Type of Trip</b>			
Percent Choosing Abbotsford as Primary Destination	79%	86%	83%
First Time Visitors (in Past 2 Years)	31%	67%	49%
<b>Average Travel Party Size</b>	2.6	2.4	2.5
<b>Visitor Party Expenditures While in Abbotsford</b>	\$185	\$922	\$585
<b>Accommodation</b>			
Hotel		41%	41%
Other Paid-Roof Accommodations		21%	21%
Camping		12%	12%
With Friends/Relatives		25%	25%
<b>Experience Evaluation</b>			
Overall Satisfied with Experience in Abbotsford <sup>2</sup>	94%	91%	92%
High Likelihood of Day visit to Abbotsford in next 2 Years <sup>2</sup>	66%	49%	55%
High Likelihood of Overnight stay in Abbotsford in next 2 Years <sup>2</sup>	14%	51%	38%
High Likelihood of Recommending Abbotsford	31%	53%	45%
NPS	-11.5	32.2	16.5

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**Front Cover Photo Credit:** Tourism Abbotsford

# INTRODUCTION

Tourism Abbotsford's 2018-2022 Strategy<sup>1</sup>, focused on three main objectives:

1. Destination Marketing: Tourism Abbotsford will conduct effective destination marketing in target markets with a focus on generating incremental overnight stays in paid accommodation;
2. Visitor Servicing: Tourism Abbotsford will provide visitors with information where/when/how they need it to support longer lengths of stay and increased spending and, Tourism Abbotsford will support tourism operators and the community at-large to deliver remarkable visitor experiences; and,
3. Destination Development: Tourism Abbotsford will contribute tourism knowledge and expertise to ensure the visitor perspective is considered in all significant local projects/ventures.

One of the strategies associated with Objective 1 was to invest in primary market research to understand current visitors to Abbotsford, perception and motivations in key markets (current visitors as well as those not choosing to visit Abbotsford and images/messages that would authentically reflect Abbotsford's brand personality. Given that Tourism Abbotsford is currently working on the next 5-Year strategic plan, it was deemed that a Visitor Study would be beneficial not only as a means of more fully implementing their previous strategy but to also inform the current strategic planning.

In Spring of 2022, Align Consulting Group was hired to provide professional marketing research services for the Summer 2022 Visitor Study. Align Consulting Group provided guidance on study design, survey development, interviewer training, onsite data collection sampling plan, onsite data collection software, administration of online follow up surveys, analysis and reporting. Tourism Abbotsford staff were used to conduct the onsite intercept surveys and overall were very successful. The challenge was that the original number of hours for the project was not achievable given the higher than expected demand for visitor services. This was a challenge that many DMOs faced this summer with unpredictable demand as we emerge from the pandemic as well as the challenges due to availability of talent to fill vacant positions. Despite these challenges, the Tourism Abbotsford team was able to complete a healthy number of intercept survey and had a high cooperation rate to the follow up. The study design is described in the next section.

Because the sample plan could not be adhered to for reasons noted above, the resulting data may not be representative of the visitors as a whole. In particular, the GeoWoodstock event accounted for approximately 36% of all intercept completes and over half of follow up completes. As such, the resulting insights may be skewed to these visitors.

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<sup>1</sup> Tourism Abbotsford Five Year Tourism Strategy, 2018 – 2022.

## 2.0. METHODOLOGY

### 2.1. Data Collection

In summer 2022, two methods were implemented to collect information from Abbotsford visitors.

**Method 1 (On-Site and Online Follow Up Surveys)** employed a two-stage, multi-location, in-person, on-site survey with an online follow up survey. Tourism Abbotsford’s Visitor Services staff doubled as researchers on select days and locations. They conducted interviews 31 days between July 1 and September 1, 2022. The on-site interview was 5-7 minutes long and finished with a request to participate in an additional online follow-up survey via email.

**Method 2 (Postcard Handout)** was initiated in mid August due to low intercept completes. A handout was developed that directed visitors to a URL or to use the QR Code provided to access an online survey which mimicked the on-site survey. Those who had already completed their Abbotsford portion of their trip were given the option to complete the follow up survey immediately or provide their email to be contacted later. Those that were still in-destination, were asked for their email address for the follow up as was in the on-site.

To encourage responses, both methods used a substantial incentive where fully completed responses entered a draw for one (1) of three (3) pre-paid gift cards valued at \$100, \$150 and \$250. The questionnaires were designed by Align Consulting Group and Tourism Abbotsford. For the most part, the questions were the same between both data collection methods. See Appendix A for the full on-site and follow-up questionnaires.

### 2022 Abbotsford Visitor Methodology

#### Method 1

##### A. On-Site Visitor Survey (393 completed)

- In-person, on-site surveys
- At various locations including the airport, major events, hotels, and the Abbotsford Farm & Country Market.
- Collected basic trip and traveller information.
- At conclusion of survey, recruited visitors to complete more detailed online follow up survey (via email).

#### Method 2

##### A. Handout with URL/QR Code to Intercept Survey (19 completed surveys)

- Visitor Services staff handed these out when they were unable to conduct interviews.
- The survey mirrored the On-site Visitor Survey in method 1.
- At conclusion of the survey, respondents were asked to complete a more detailed online follow up survey (via email ) or, as an option to those who already returned home, immediately.



#### B. Online Follow Up Survey

##### (88 completed from Method 1 and 11 completed from Method 2)

- Online survey sent via email collected in on-site visitor survey.
- More detailed trip characteristics, use of visitor information services, and perceptions of Abbotsford and experience evaluation.
- Respondents were entered into a draw for one (1) of three (3) pre-paid gift cards valued at \$100, \$150 and \$250.



For method 1, a total of 587 people were approached to participate in the on-site survey. Of those, 514 people (88%) agreed to participate, 84 were screened out because they were locals, not spending any leisure time in Abbotsford, or had already completed the survey. A total of 233 visitors agreed to complete the online, follow-up survey. One invitation email followed by up to two reminder emails were sent over several weeks to those people who had not started or completed the survey. A total of 88 visitors completed the follow up online survey for a response rate of 38%.

Method 2 (the postcard handout) was initiated in mid-August. A total of 28 people started the online survey, 4 were not in the population and 5 people did not complete the survey. This totals 19 who completed the 'on-site' portion of the online survey. Respondents had the opportunity to complete the follow up at that time (if they had already returned home from their trip) or to provide an email and complete it at a later date. This resulted in 11 visitors completing the follow up survey.

	Number and % of Total	
	On-Site	Hand-Out
People Approached	587	
Refused	73 (12%)	
Agreed to Survey	514 (88%)	28
Screened Out/Not in Study Population	84 (14%)	4 (14%)
Partials/Drop Off	37 (6%)	5 (18%)
Completed the On-Site Survey	393 (67%)	19 (68%)
Agreed to Follow-Up	233 (40%)	18 (64%)
Completed Follow-Up	88 (15%)	11 (39%)
<b>Response Rate to Follow-Up</b>	<b>38%</b>	<b>61%</b>

## 2.2. Data Analysis

Data from both methods were downloaded, merged together and coded<sup>2</sup>. Abbotsford visitors were described using simple frequencies and averages from the interview and follow-up survey data. Other data analysis details include:

- Data from methods were combined and are summarized in the following pages.
- Occasionally, top box analysis was used where the top two responses were summarized to understand meaningful differences between groups (e.g. visitors that responded with '4s' or '5s' on a 5-point satisfaction scale).
- For questions that were asked in both the on-site and follow-up surveys (i.e. length of stay and expenditures), the follow-up survey data replaced the on-site data if available. This is done because the follow-up information is deemed to be more accurate as their trip is complete and therefore able to respond more accurately.
- Both surveys collected expenditures for each travel party (and not per visitor) but average party size was divided into total travel party expenditures to equal per person expenditures. Further, average length of stay in Abbotsford was used to calculate expenditures on a per-person, per-day basis.
- To avoid the influence of outliers in expenditures, travel party and length of stay calculations, the top and bottom 2.5% of responses were trimmed.
- Open-ended (textual) responses were grouped into categories and summarized with percentages.
- Postal codes and Zip Codes were collected for visitors from North America.
- Sample size warnings were provided as footnotes when response categories had less than 30 responses.

In addition, data were summarized by Day Visitors versus Overnight Visitors. Differences were identified by statistical tests.

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<sup>2</sup> Coded means open-ended responses were categorized into meaningful groups.

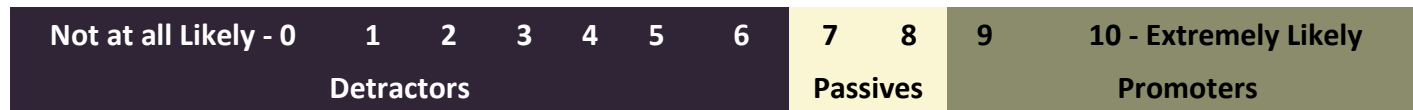
### 2.2.1. Net Promoter Score

Growing customer service/experience expectations, changing tourism markets, and increasing worldwide competition have led to substantial shifts in the tourism marketplace over the past decade. The delivery of outstanding visitor experiences is critical to achieve higher revenues via increased spending, longer stays, repeat visits and visitors’ positive word of mouth recommendations.

One goal of Destination British Columbia’s (DBC) 2020-2023 corporate strategy<sup>3</sup> is for British Columbia to become the most highly recommended destination in North America. The Net Promoter Score® (NPS®)<sup>4</sup> measures the intention to recommend a travel destination and is also an indicator of overall satisfaction with the travel experience.

NPS is measured by asking one question (likelihood of recommending Abbotsford as a travel destination) on the follow-up questionnaire. The question results are used to categorize visitors into one of three groups – promoters (very/extremely likely to recommend), passives (may or may not recommend) and detractors (not likely to recommend). Overall, the percent of detractors is subtracted from the percent of promoters to equal the NPS (see below). See Appendix B for NPS results from other organizations.

*How likely are you to recommend Abbotsford as a travel destination to a friend, family member or colleague?*



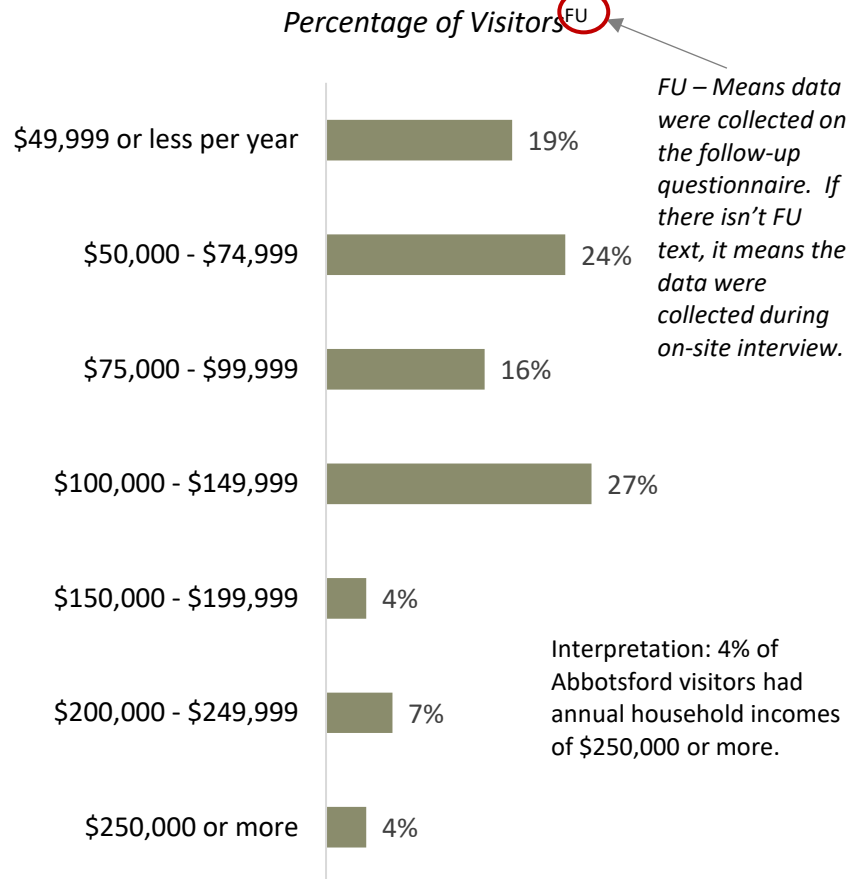
$$\begin{matrix} \% \\ \text{Promoters} \end{matrix} - \begin{matrix} \% \\ \text{Detractors} \end{matrix} = \text{NPS}$$

<sup>3</sup> [https://www.destinationbc.ca/content/uploads/2021/03/CorporateStrategy2020-2023\\_March2021\\_Update-March-9.pdf](https://www.destinationbc.ca/content/uploads/2021/03/CorporateStrategy2020-2023_March2021_Update-March-9.pdf)

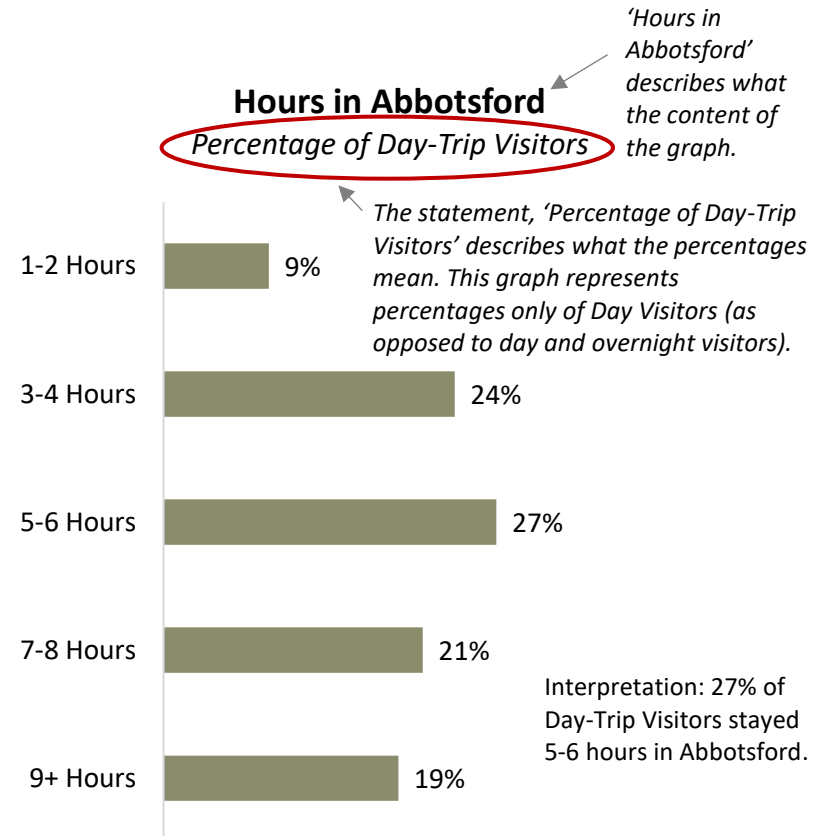
<sup>4</sup> Net Promoter, NPS and the NPS-related emoticons are registered service marks, and Net Promoter Score and Net Promoter System are service marks, of Bain & Company, Inc., Satmetrix Systems, Inc. and Fred Reichheld.

### 2.3. Tips for Reading Results

#### Annual Household Income (\$CDN)



#### Hours in Abbotsford

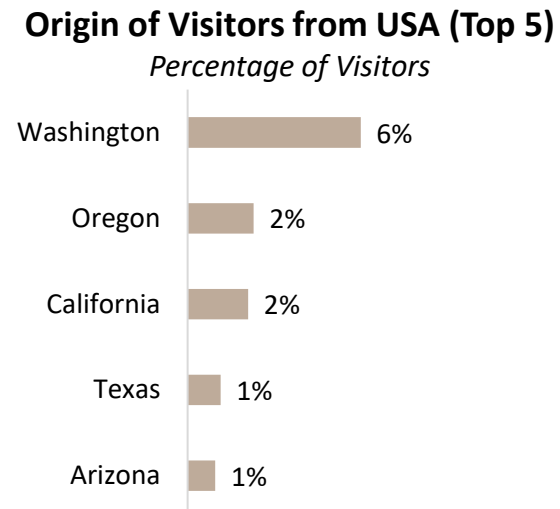
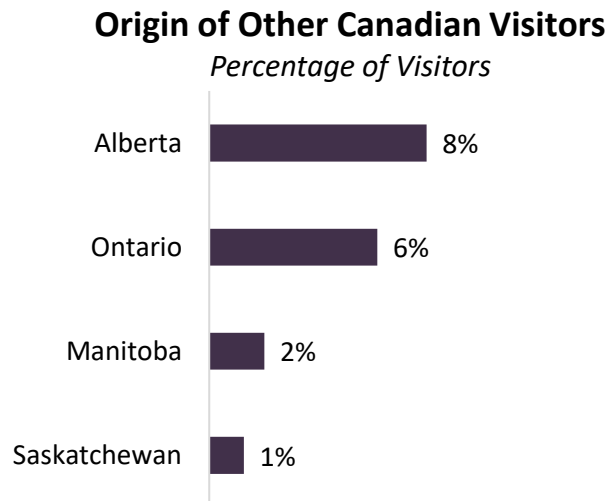
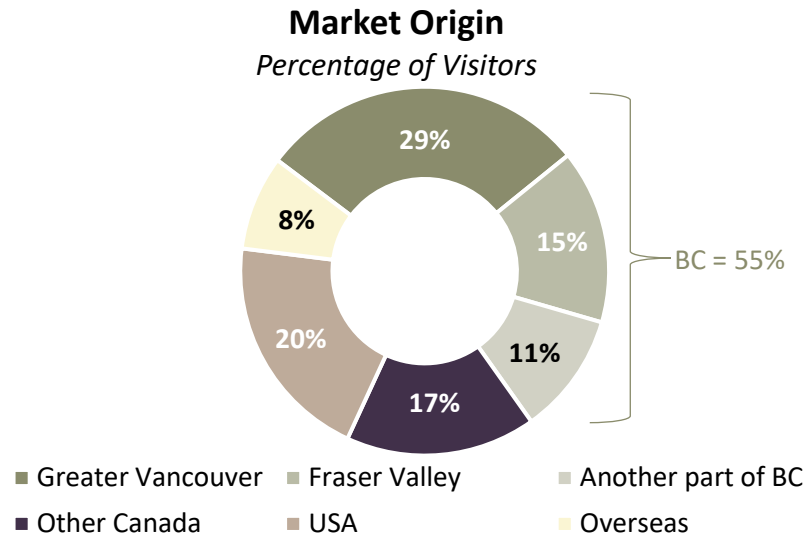


*Footnotes about questions are noted here. Often they describe the 'other' categories, describe an analysis note, or describe the number of responses (n) if low.*

1. Visitors could respond with more than one response therefore the percentages add up to more than 100%.

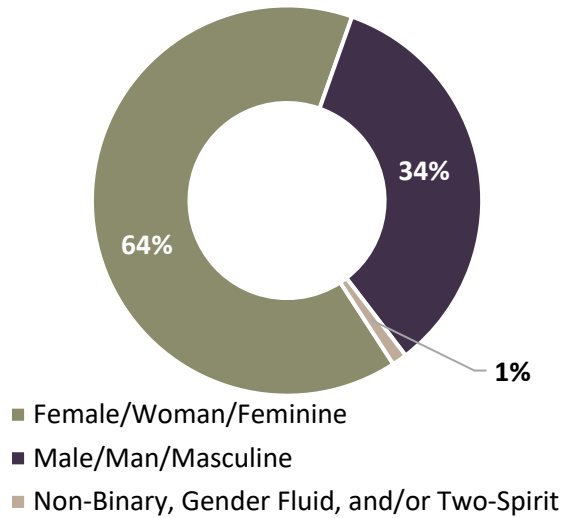
# 3.0. RESULTS

## 3.1. Visitor Characteristics



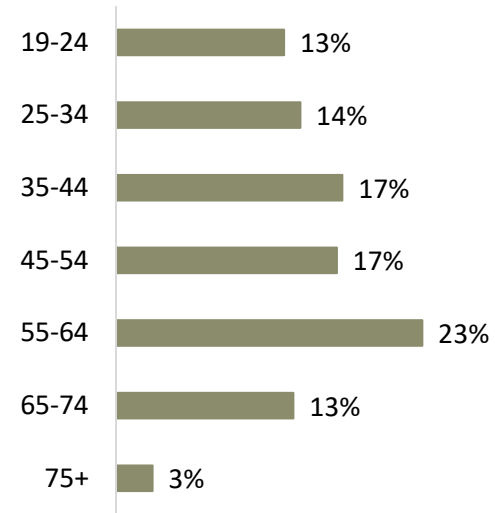
### Gender

Percentage of Visitors



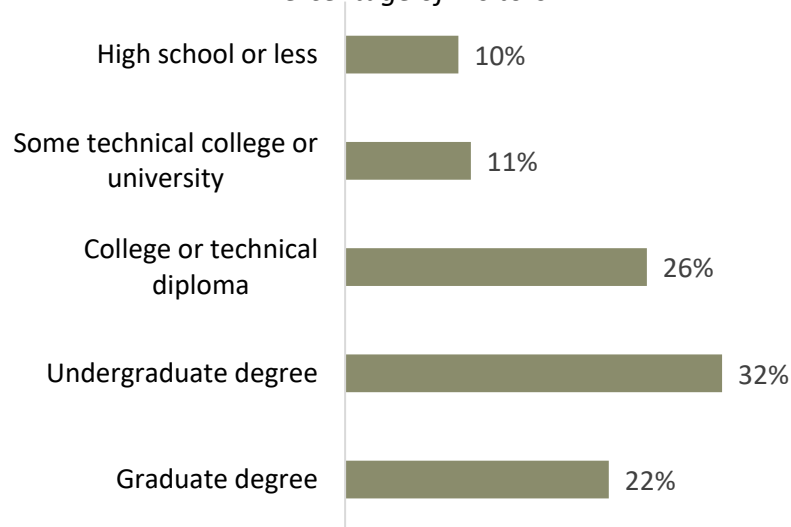
### Age

Percentage of Visitors



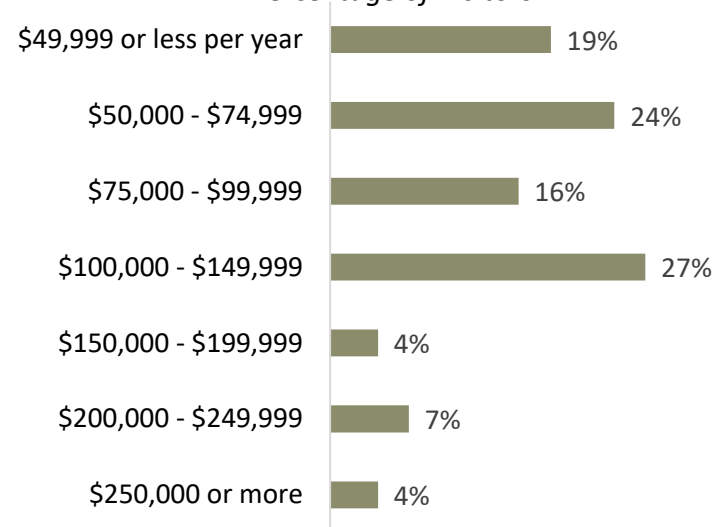
### Highest Education

Percentage of Visitors<sup>FU</sup>



### Annual Household Income (\$CDN)

Percentage of Visitors<sup>FU</sup>

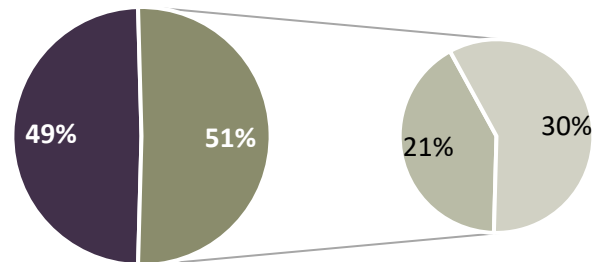


### 3.2. Trip Characteristics

#### 3.2.1. Previous Visitation

#### Been to Abbotsford for Leisure in Past 2 Years

Percentage of Visitors



- Have not been in past 2 years
- Been in past 2 Years - Overnight
- Been in past 2 Years - Day Only

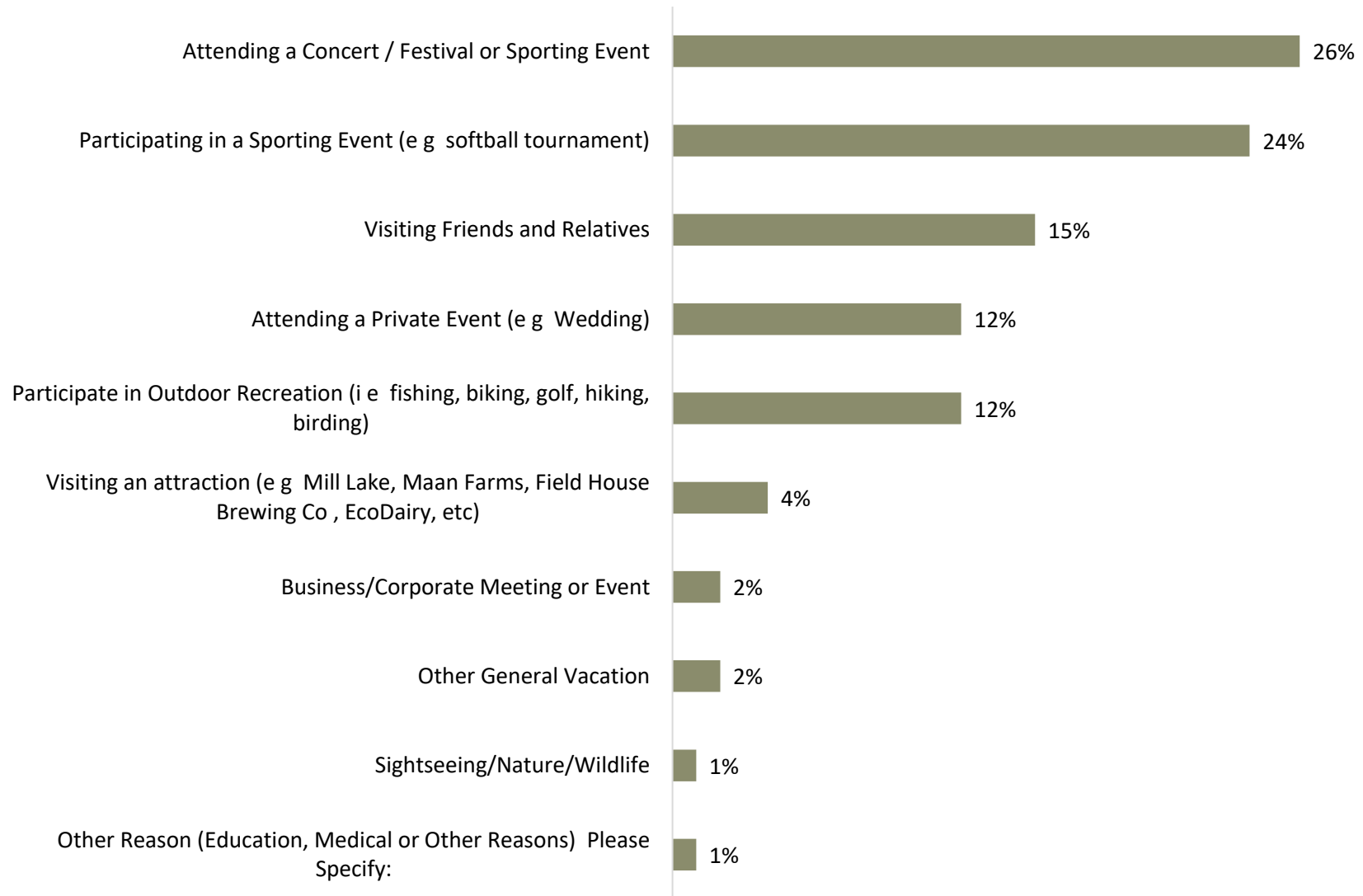
	Day Visitors	Overnight Visitors	All Visitors
Have not been in past 2 years	31%	67%	49%
Average # of trips in past 2 years <sup>1</sup>	26.3	11.8	21.2
% Taken 1 trip in past 2 years <sup>1</sup>	3%	18%	8%
% Taken 10+ trips in past 2 years <sup>1</sup>	56%	19%	43%

1. Among those who took a trip in the past 2 years

### 3.2.2. Travel Motivations and Activities

#### Primary Motivation to Visit Abbotford

Percentage of Visitors<sup>FU</sup>

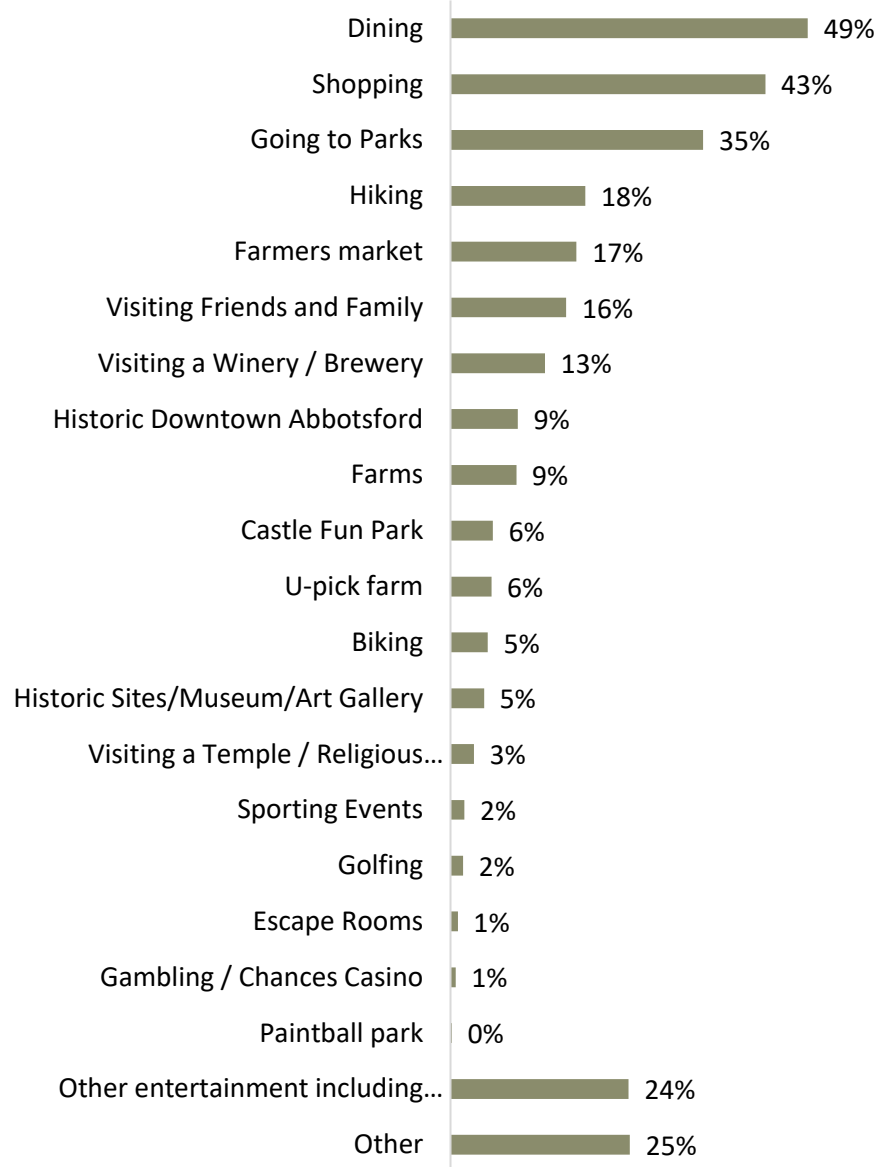




### Leisure Activity Participation

(intercept so includes planned)

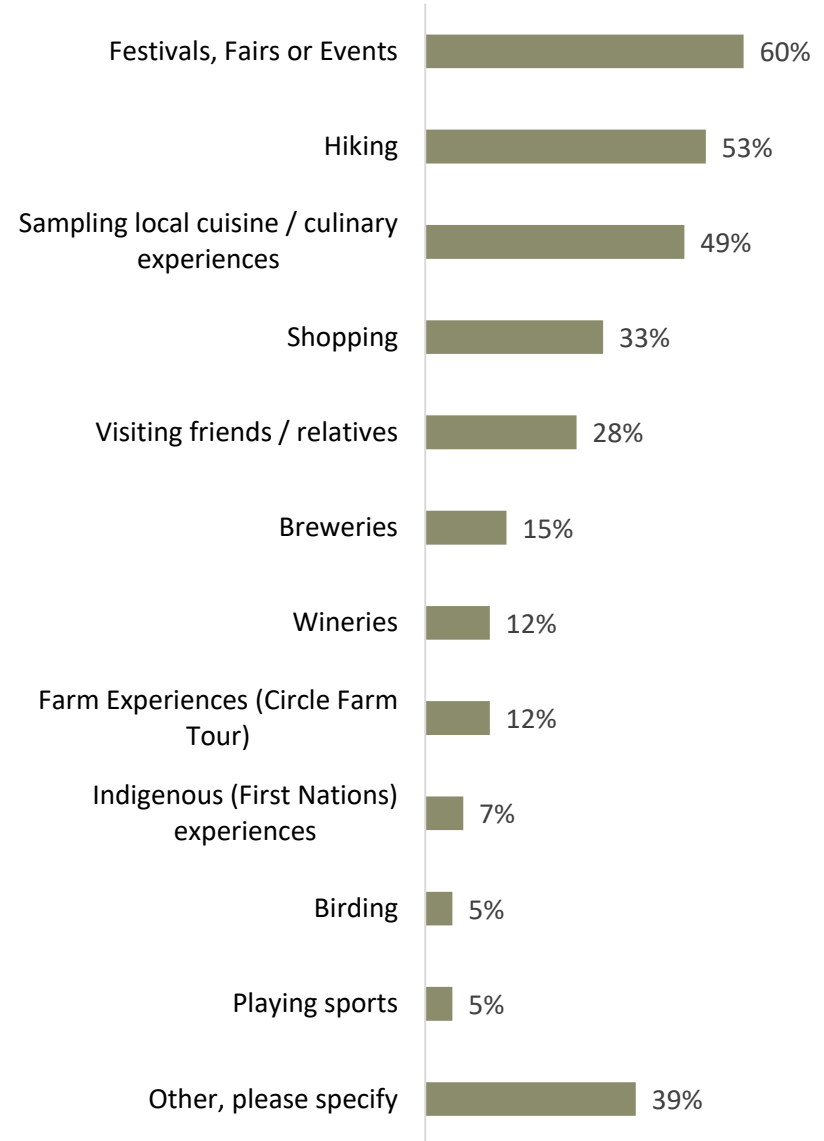
Percentage of Visitors



### Activity Participation

(those with 5% of more)

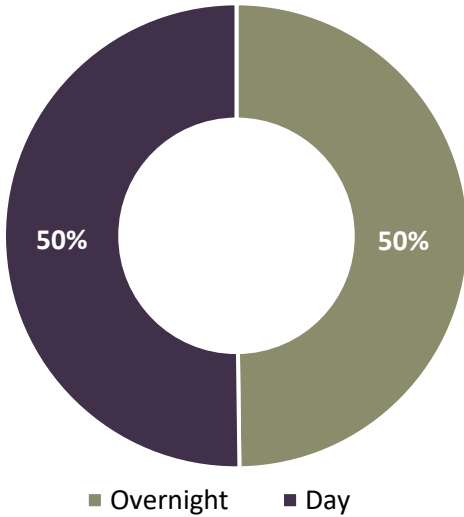
Percentage of Visitors<sup>FU</sup>



### 3.2.3. Length of Stay

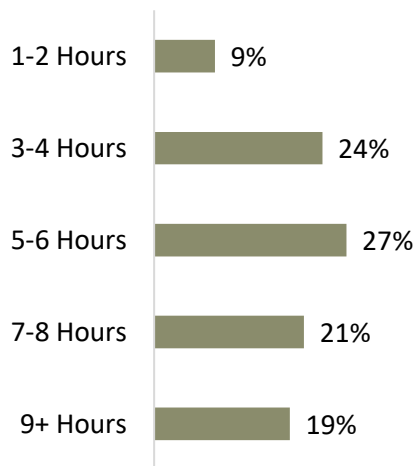
#### Length of Stay in Abbotsford

Percentage of Visitors



#### Hours in Abbotsford

Percentage of Day-Trip Visitors



Average Number of Nights Away from Home:

**7.33**

Average Number of Nights in Abbotsford:

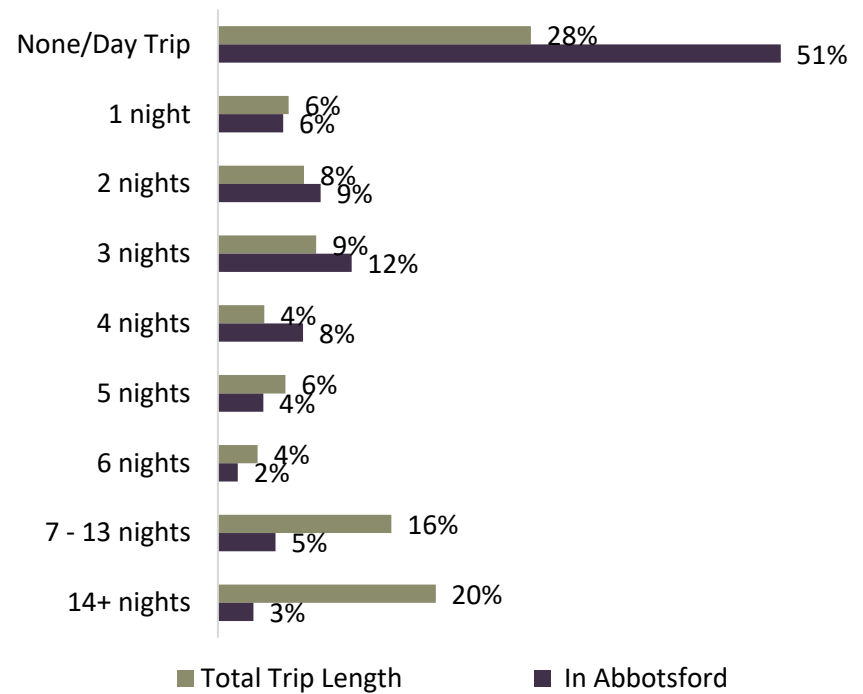
**2.23**

Percent of Trip Length (in nights) spent in Abbotsford (on average):

**30%**

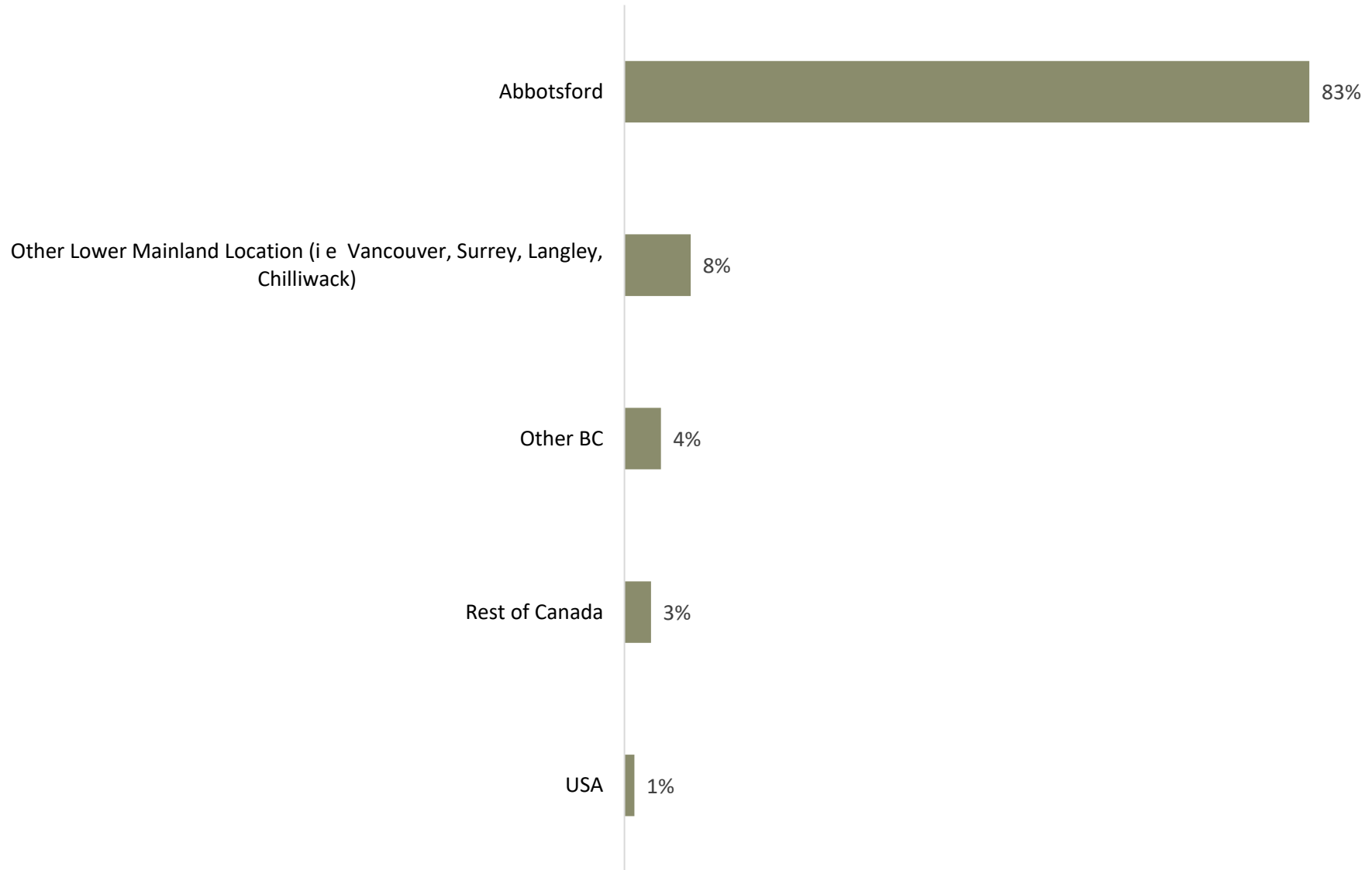
#### Nights on Trip and in Abbotsford

Percentage of Visitors



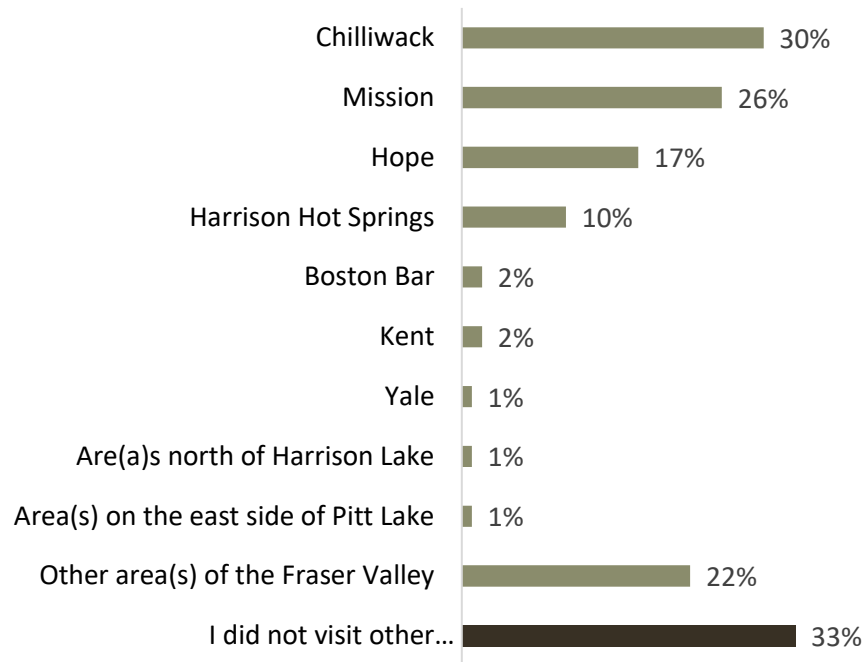
### 3.2.4. Destinations Visited

**Primary Destination**  
*Percentage of Visitors*



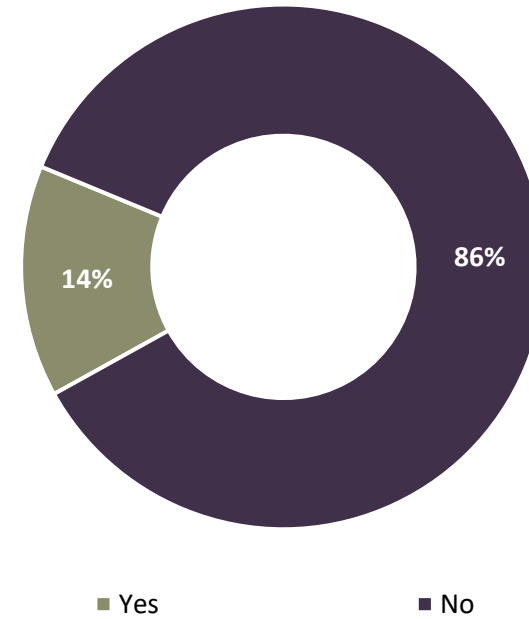
### Other Fraser Valley Destinations Visited on Same Trip

Percentage of Visitors<sup>FU</sup>



### Spending Time in Abbotsford Due to Airport

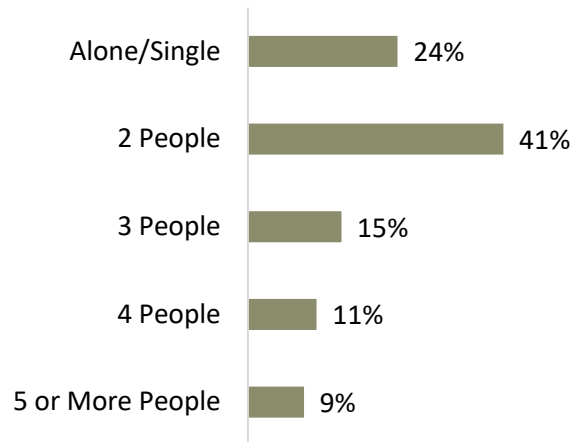
Percentage of Visitors



### 3.2.5. Travel Party Composition

#### Travel Party Composition

Percentage of Respondents



#### Average Travel Party Size<sup>1</sup>:

**2.5** people (1.96 Adults, 0.51 Children under 18)

#### Percent of Respondents Travelling with Children under 18:

**27%**

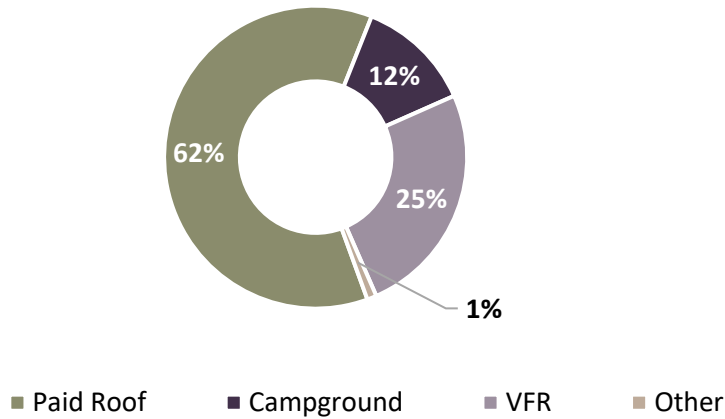


	Day Visitors	Overnight Visitors	All Visitors
Average Travel Party Size	2.6	2.4	2.5
% of Visitor Parties with Children under 18	36%	18%	27%

### 3.2.6. Accommodations and Transportation

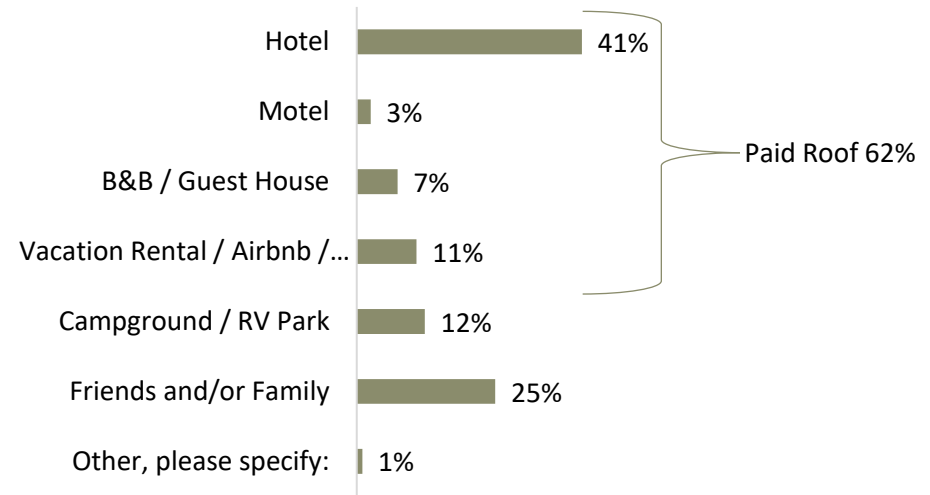
#### Abbotsford Overnight Accommodation

Percentage of Overnight Visitors



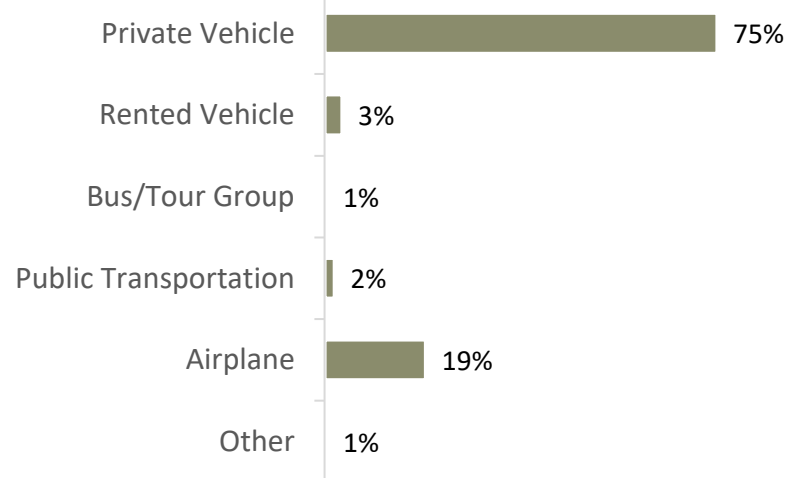
#### Accommodation Type

Percentage of Overnight Visitors



#### Transportation to Abbotsford

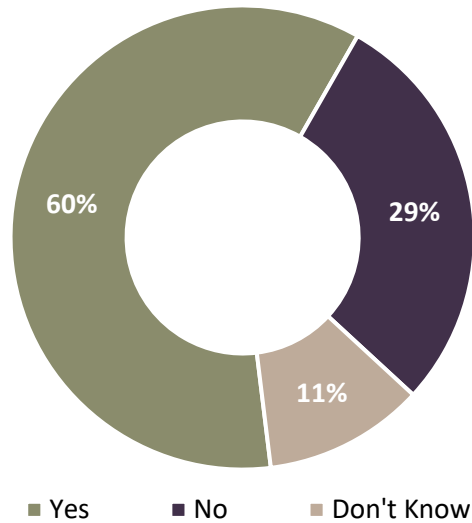
Percentage of Visitors



### 3.2.7. Historic Downtown

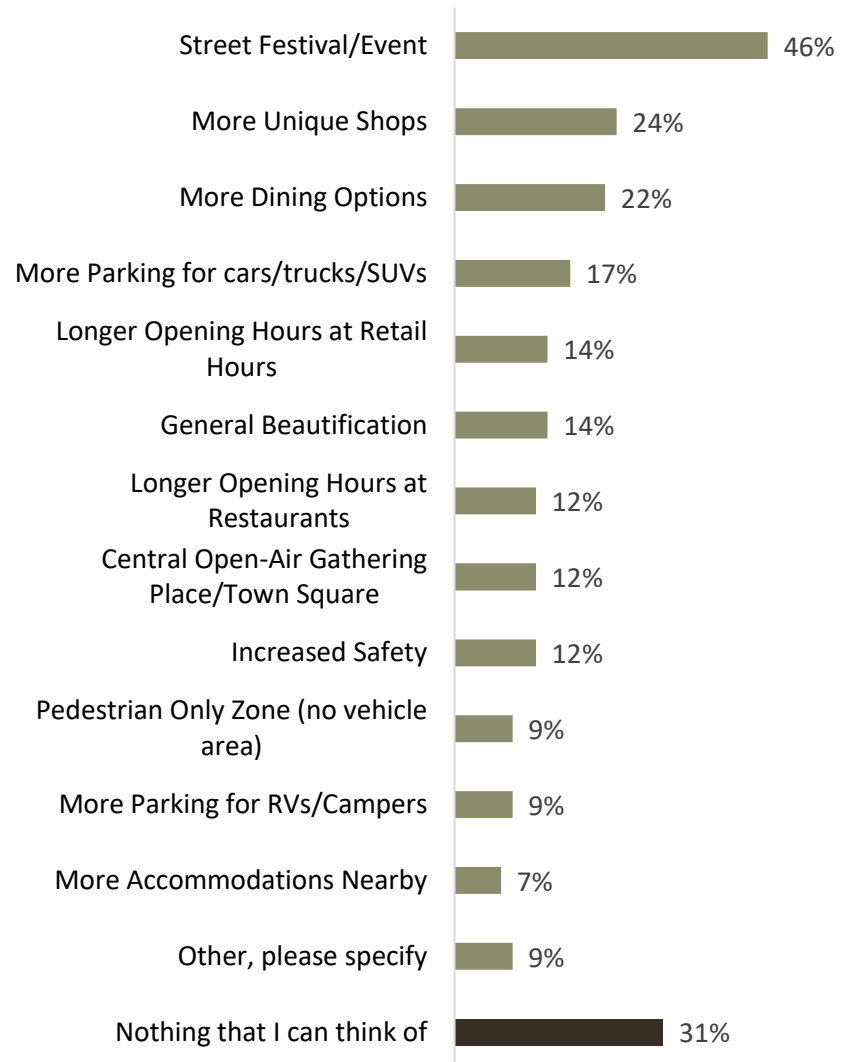
#### Visit Downtown Abbotsford?

Percentage of Visitors<sup>FU</sup>



#### Increase Likelihood to Spend Time in Downtown

Percentage of Downtown Visitors<sup>FU</sup>



1. The survey question used the following terms. Vacation Rental (whole home/condo) Short-Term Rental (Room/Suite/Bed) in a private home.

### 3.3. Expenditures

Expenditures in Abbotsford (Averages) <sup>1</sup>				
	Visitor Party		Per Person	
	Trip Expenditures	Daily Expenditure <sup>2</sup>	Trip Expenditures <sup>3</sup>	Daily Expenditure <sup>4</sup>
Day Visitors	\$185	\$185	\$98	\$98
Overnight Visitors	\$922	\$259	\$524	\$135
Overnight - Paid Roofed	\$1,019	\$312	\$555	\$162
Overnight – Camping <sup>5</sup>	\$618	\$172	\$220	\$60
Overnight – VFR <sup>6</sup>	\$871	\$162	\$644	\$107
<b>Overall</b>	<b>\$585</b>	<b>\$225</b>	<b>\$330</b>	<b>\$118</b>

1. The expenditures presented were collected on the on-site interview with follow-up overwriting the on-site data if applicable.  
2. Visitor Party Daily Expenditures = Visitor Party Trip Expenditures/Night in Abbotsford (Day Visitor=1).  
3. Per Person per Trip Expenditures = Visitor Party Trip Expenditures/ People in Travel Party.  
4. Per Person Daily Expenditures = Per Person per Trip Expenditures/People in Travel Party.  
5. Very small sample sizes, n=21, use caution when interpreting.  
6. VFR = Visiting (staying with) Friends and Family. Small sample sizes, n=36, use caution when interpreting.

Expenditures in Abbotsford – Averages in Each Category <sup>1</sup>								
	Paid Accomm.	Transportation	Food and Beverage	Shopping	Attractions	Outdoor Recreation	Other Entertainment	Other Expenditures
<b>Day Visitor<sup>2</sup></b>								
% spent on	0%	8%	40%	23%	9%	8%	1%	12%
\$ spent on	\$0	\$14	\$74	\$43	\$17	\$14	\$2	\$22
<b>Overnight Visitors</b>								
% spent on	39%	15%	16%	13%	10%	3%	2%	2%
\$ spent on	\$359	\$134	\$148	\$118	\$89	\$31	\$20	\$22
<b>Total</b>								
% spent on	25%	12%	25%	16%	10%	5%	2%	6%
\$ spent on	\$148	\$71	\$143	\$96	\$55	\$28	\$10	\$34

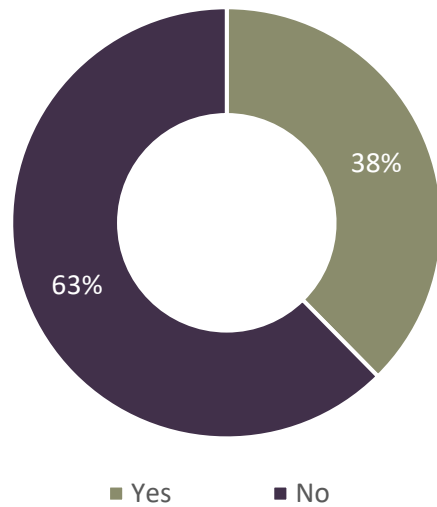
1. The percent of expenditures presented in each category are collected in the follow-up online survey. The average overall expenditures from the on-site interview were multiplied by the average percentage in each expenditures category to equal the average dollars spent for each category  
2. Very small sample sizes, n=24, use caution when interpreting.



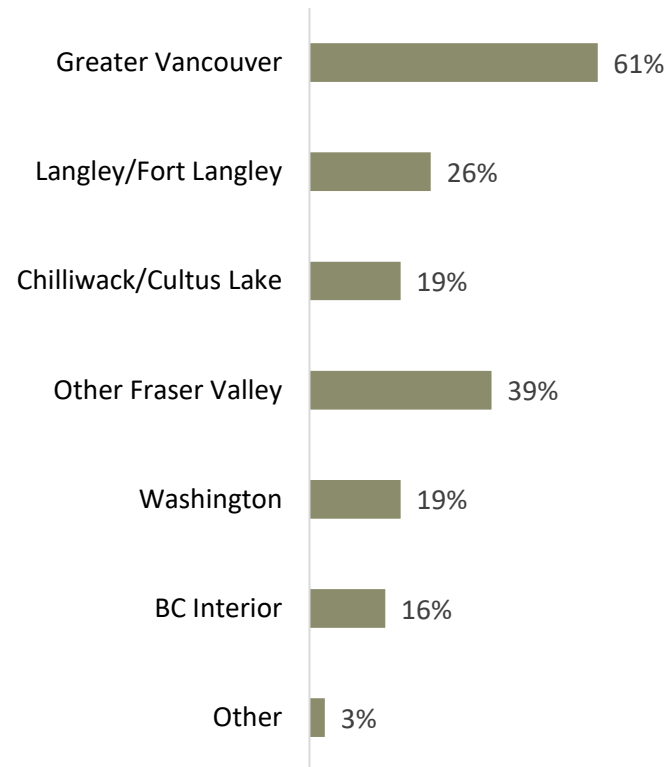
### 3.4. Decision Making and Perceptions

#### 3.4.1. Consideration of Other Destinations

**Consider Other Destinations?**  
Percentage of Visitors<sup>FU</sup>



**Other Destinations Considered<sup>1</sup>**  
Percentage of Visitors that Considered Other Destination<sup>FU</sup>

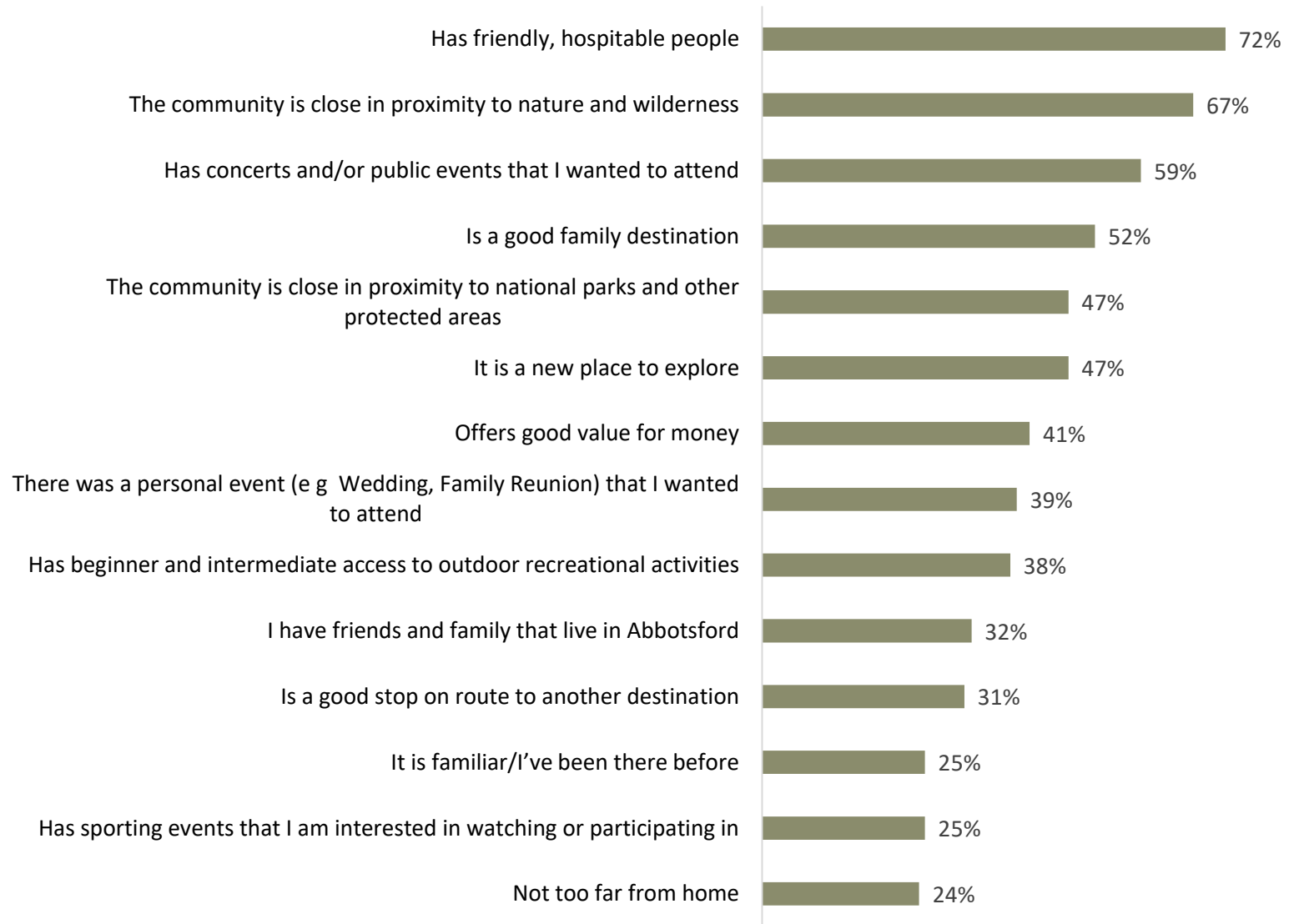


1. Visitors could respond with more than one response therefore the percentages add up to more than 100%. 31 visitors suggested 59 other destinations.

### 3.4.2. Decision Factors

#### How Important Was Each Factor In Deciding To Visit Abbotsford?

Percentage of Visitors Rating Top-Box (4 or 5 - Extremely Important) <sup>FU</sup>



Scale: 1 = Not At All Important to 5 = Extremely Important

Component	Average Rating <sup>1</sup>		
	Day Visitors	Overnight Visitors	All Visitors
	Has friendly, hospitable people	3.86	4.02
The community is close in proximity to nature and wilderness	3.74	3.87	3.83
Has concerts and/or public events that I wanted to attend	3.35	3.80	3.64
Is a good family destination	3.34	3.16	3.23
The community is close in proximity to national parks and other protected areas	3.06	3.40	3.28
It is a new place to explore	2.76	3.50	3.24
Offers good value for money	2.94	3.41	3.24
There was a personal event (e.g. Wedding, Family Reunion) that I wanted to attend	2.76	3.03	2.93
Has beginner and intermediate access to outdoor recreational activities	3.11	2.87	2.96
I have friends and family that live in Abbotsford	2.47	2.54	2.52
Is a good stop on route to another destination	2.33	2.71	2.57
It is familiar/I've been there before	2.77	1.94	2.24
Has sporting events that I am interested in watching or participating in	2.11	2.30	2.23
Not too far from home	3.26	1.80	2.34

## 3.4.3. Perceptions - Highlights

What highlights, if any, did Abbotsford have as a travel destination?		
Coded Grouping	Percentage of Responses <sup>1</sup>	Examples
Events	58%	<i>Airshow, Canada Day Festivities, GeoWoodstock</i>
Farms/Farm Tours	17%	<i>Lepp's, Farm Tours, Farming areas south of town</i>
Hiking		
Hiking Trails	10%	<i>Hiking, Multiple hiking trails</i>
Sumas Mountain	6%	<i>Sumas mountain top view, Sumas Mountain</i>
Parks & Outdoor		
Parks/Green Spaces – General	10%	<i>Parks, Lots of parks</i>
Parks - Mill Lake	6%	<i>Mill Lake Park, Mill Lake</i>
Outdoor - General	4%	<i>Outdoor opportunities</i>
Family/Friends	7%	<i>Close to family</i>
Food & Beverage		
Dining	7%	<i>Restaurants, Food options</i>
Ice Cream	6%	<i>Great ice creams shops (Common good and banter)</i>
Craft Breweries/Wineries	4%	<i>Wineries, Good craft breweries</i>
Easy to get to/around	7%	<i>Easy to get around, Easy to navigate</i>
Explore Abbotsford GeoTour	6%	<i>Explore Abbotsford GeoTour</i>
Longhouse Dinner	4%	<i>Sumas Nation Longhouse Dinner</i>
Shopping	4%	<i>Shopping was great, Clayburn Store</i>
Scenery		
General	4%	<i>Beautiful scenery</i>
Mountain views	4%	<i>Mount Baker, Mount Cheam</i>
Other	22%	<i>Clean city, Friendly people, Kid friendly attraction</i>

1. 72 visitors suggested 133 highlights. Totals do not add to 100% because one visitor suggested multiple highlights.

### 3.4.3. Perceptions - Shortcomings

What shortcomings, if any, did Abbotsford have as a travel destination? <sup>1</sup>	
Affordable RV parks	Metric system
Border crossing	Mil lake park
City very sprawling	Need better sound quality at Calvin dick concert
Clogged highways	Need more family friendly
Finding public transport information in advance	Needs more outdoor activities with better parking
High cost of everything and too many homeless	Not enough shopping -even for local artisan products
High gas prices	Not a lot of wifi
Highway 1 traffic was a challenge due to accidents	Not allowing food trucks at the event
Horrible traffic	Not enough outdoor trails or well known park space
It is a fair distance from my home in Vancouver	Not enough shaded playgrounds or water parks
Lack of public transportation	Road construction. Part of this time of year.
Lack of RV camping availability	Traffic controls
Limited capacity at the only outdoor pool	Traffic to enter Abby Airshow
Lots of roundabouts	Traffic with construction to get there was not ideal
Loud vehicles racing around town at night	Would like more outdoor dining

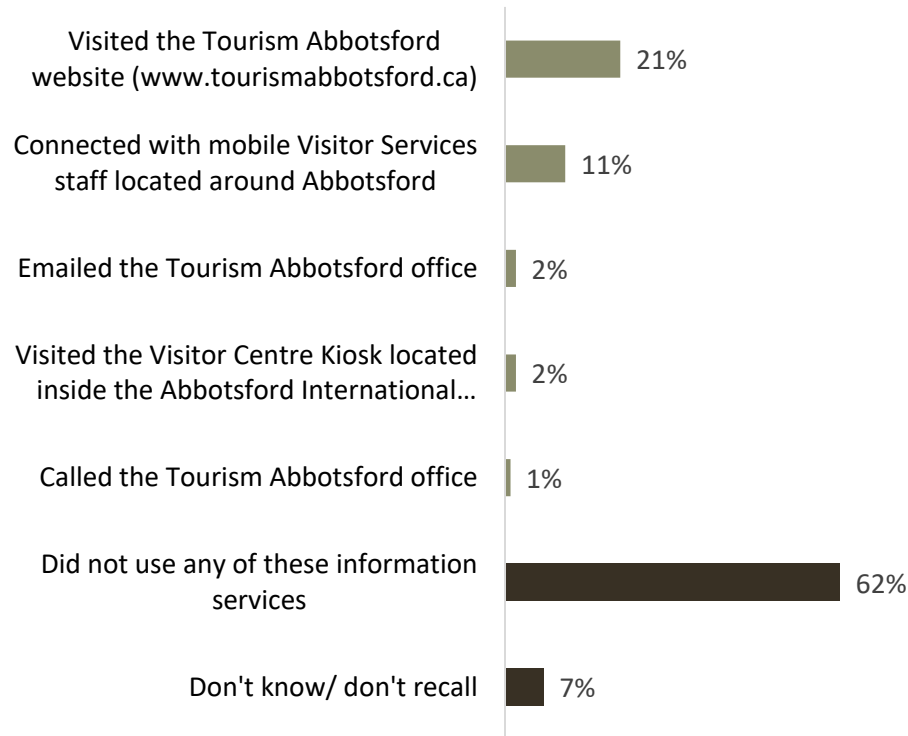
1. Only 22 respondents provided 30 responses, therefore, the verbatim comments are included above.

### 3.5. Visitor Information Services

#### 3.5.1. Awareness/Usage of Tourism Abbotsford’s Services

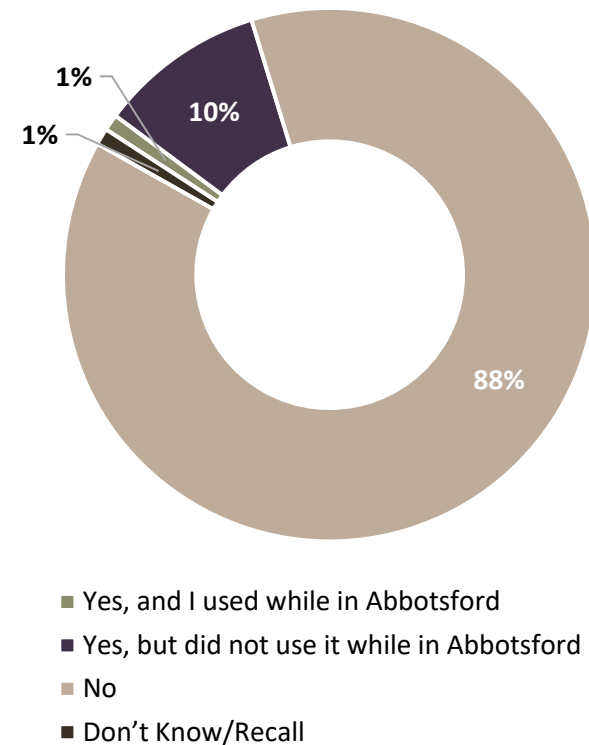
##### Use of Tourism Abbotsford Before/During Trip

Percentage of Visitors<sup>FU</sup>



##### Aware of Free Explore Abbotsford App

Percentage of Visitors<sup>FU</sup>

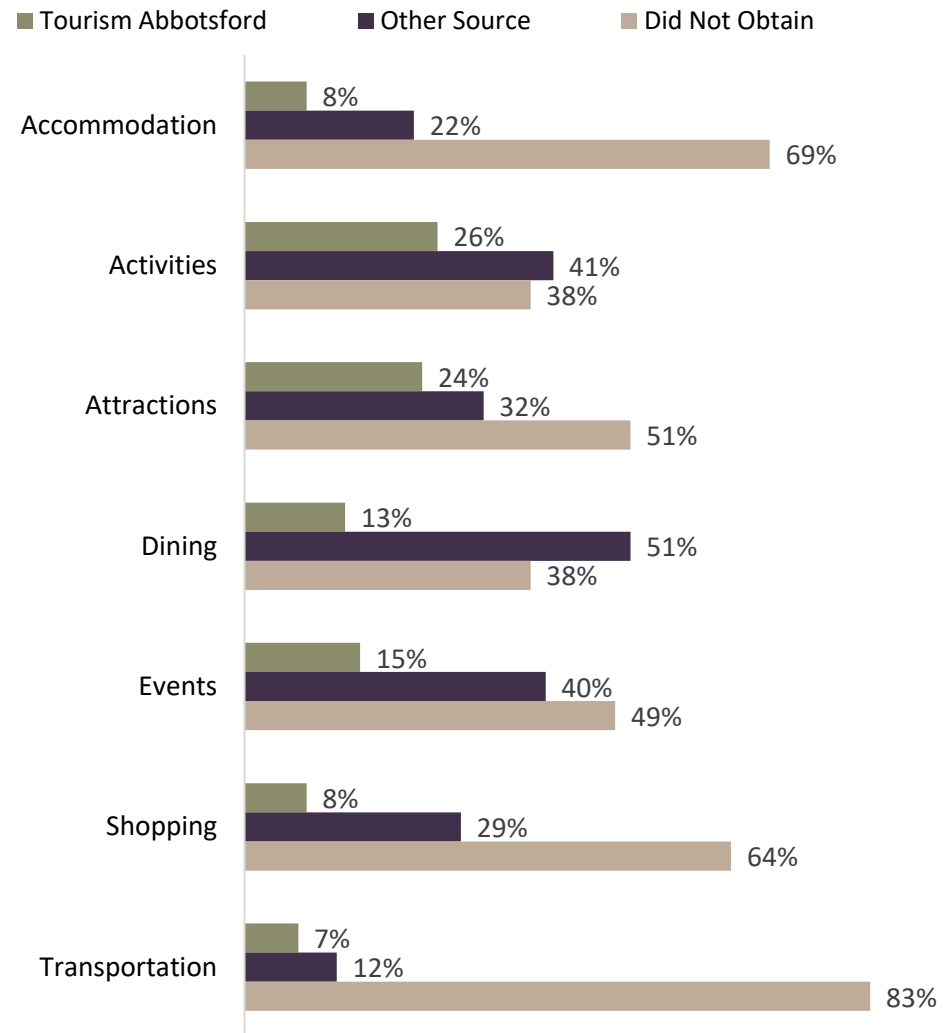


1. Visitors could respond with more than one response therefore the percentages add up to more than 100%.

### 3.5.2. In-Destination Information Sources

#### In-Destination Source of Information by Topic

Percentage of Visitors<sup>FU</sup>

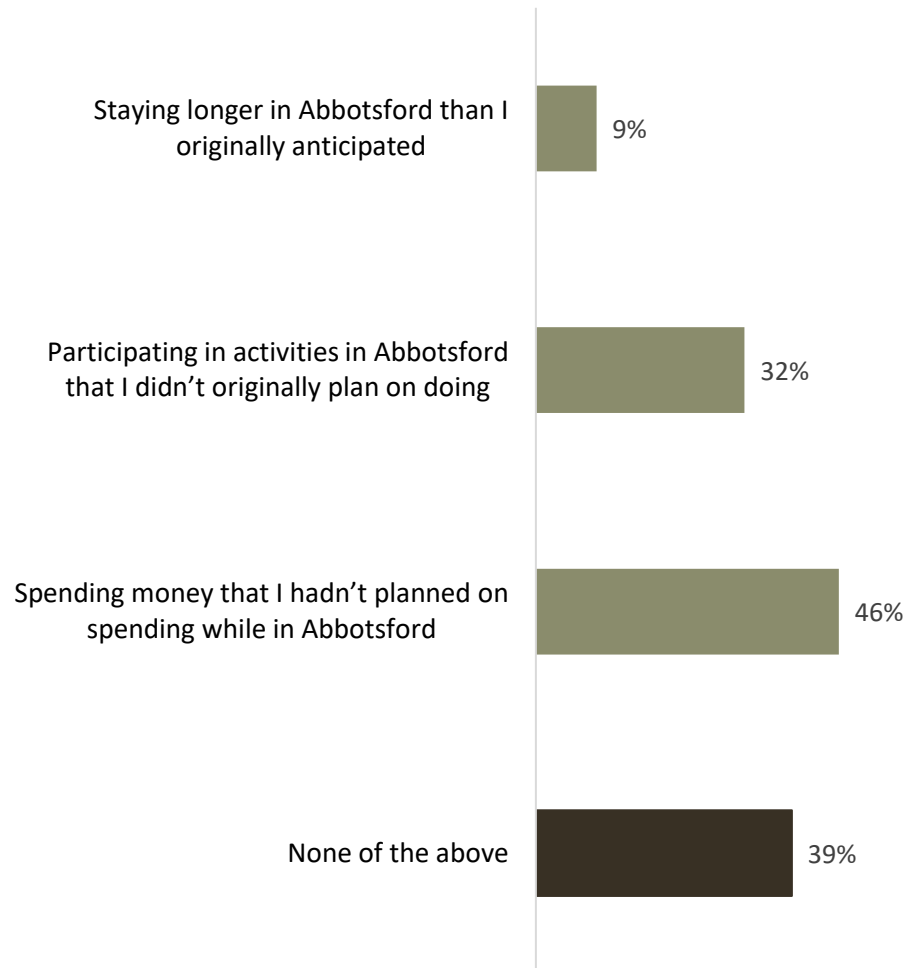


2. Visitors could respond with more than one response therefore the percentages add up to more than 100%.

### 3.5.3. Impact of Experience and In-Destination Information

#### Influence of Experience and Information on Trip<sup>1</sup>

Percentage of Visitors<sup>FU</sup>



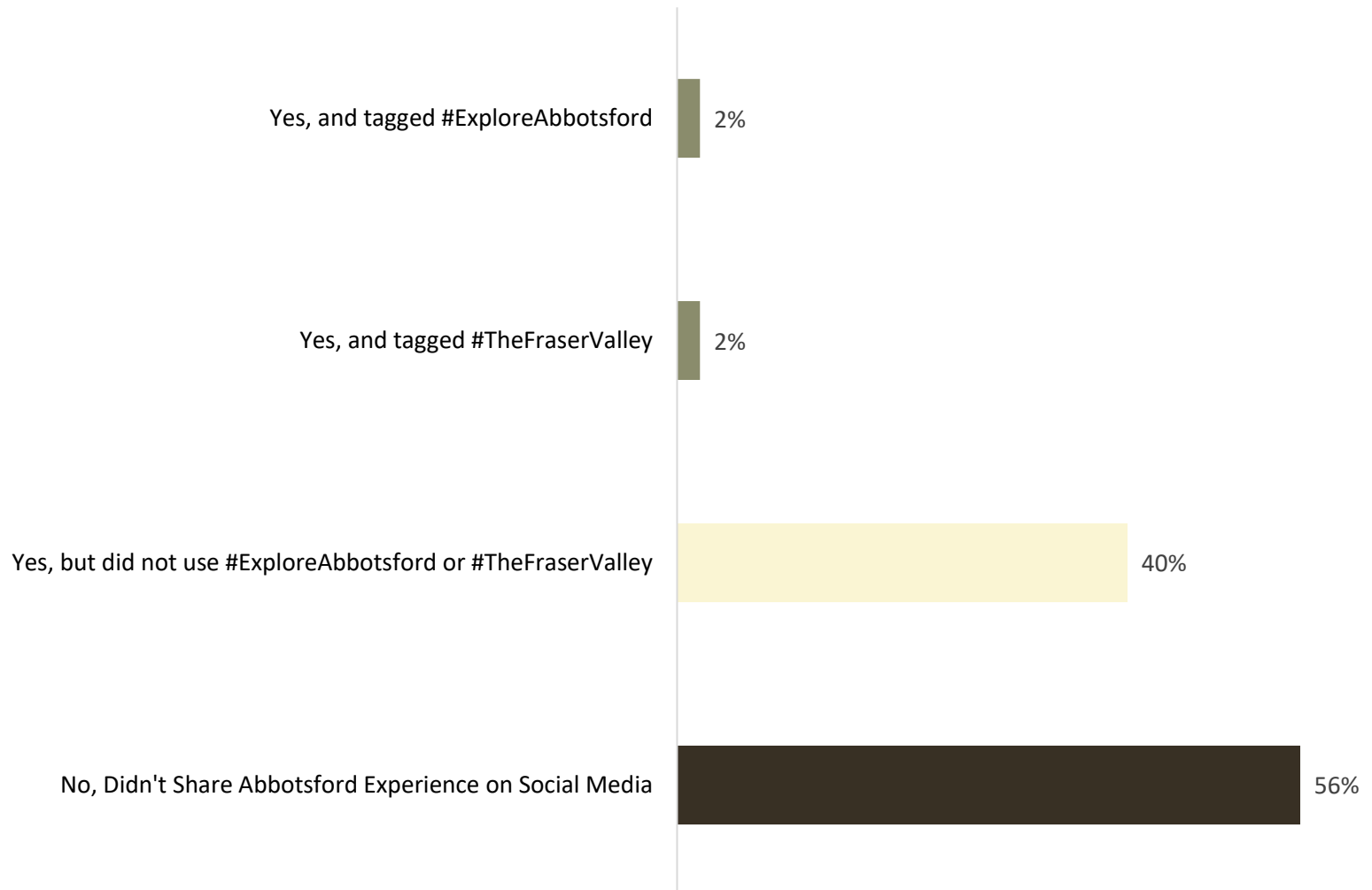
1. Visitors could respond with more than one response therefore the percentages add up to more than 100%.



### 3.5.4. Social Media Sharing

#### Use of Hashtags and Sharing About Abbotsford on Social Media

Percentage of Visitors<sup>FU</sup>

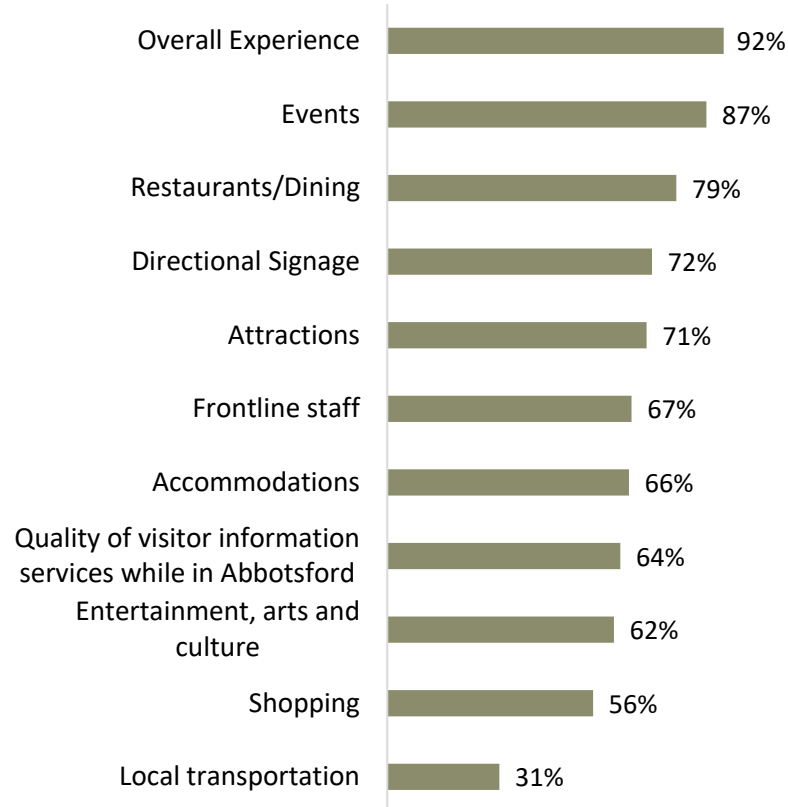


### 3.6. Evaluation of Abbotsford Tourism Experiences

#### 3.6.1. Tourism Experience by Components

##### Experience of Each Component while in Abbotsford<sup>FU</sup>

Top Box Responses<sup>1</sup> - Percentage of Visitors Responding 4 or 5

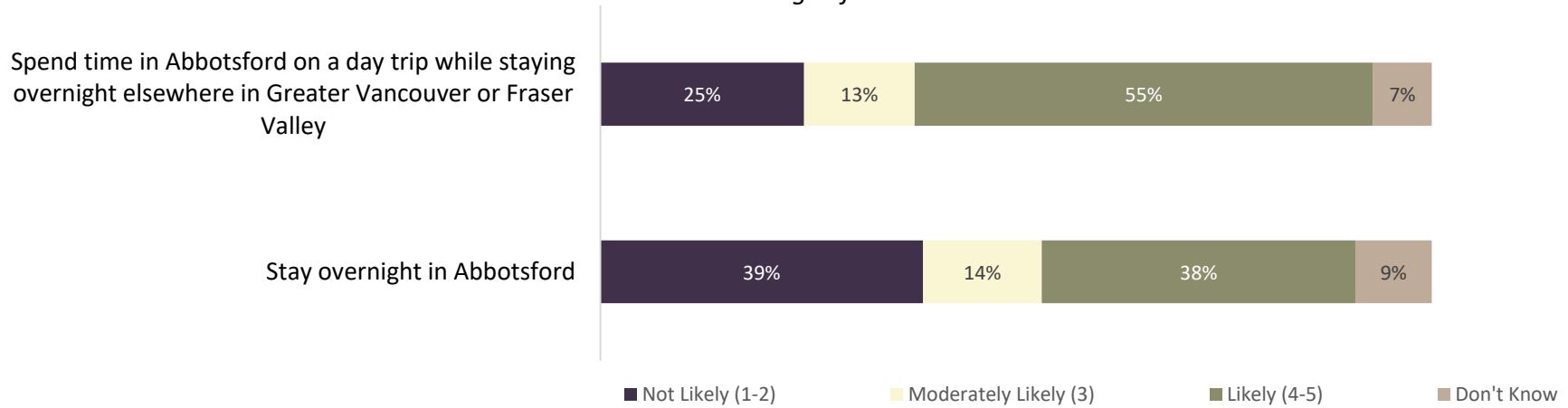


Component	Average Rating <sup>1</sup>			N
	Day Visitors	Overnight Visitors	All Visitors	
<b>Overall Experience</b>	<b>4.63</b>	<b>4.63</b>	<b>4.63</b>	98
Events	4.31	4.62	4.52	93
Restaurants/Dining	4.30	4.37	4.35	95
Directional Signage			4.10	90
Attractions	3.97	4.24	4.15	89
Frontline staff			4.17	94
Accommodations	3.56	4.31	4.08	88
Quality of visitor information services while in Abbotsford	3.74	4.18	4.02	84
Entertainment, arts and culture	3.97	4.11	4.06	88
Shopping	3.72	3.89	3.83	89
Local transportation	3.21	3.49	3.38	72

### 3.6.2. Likelihood of Return to Abbotsford

#### Based on Experience In Abbotsford, Likely to Return in Next 2 Years to...

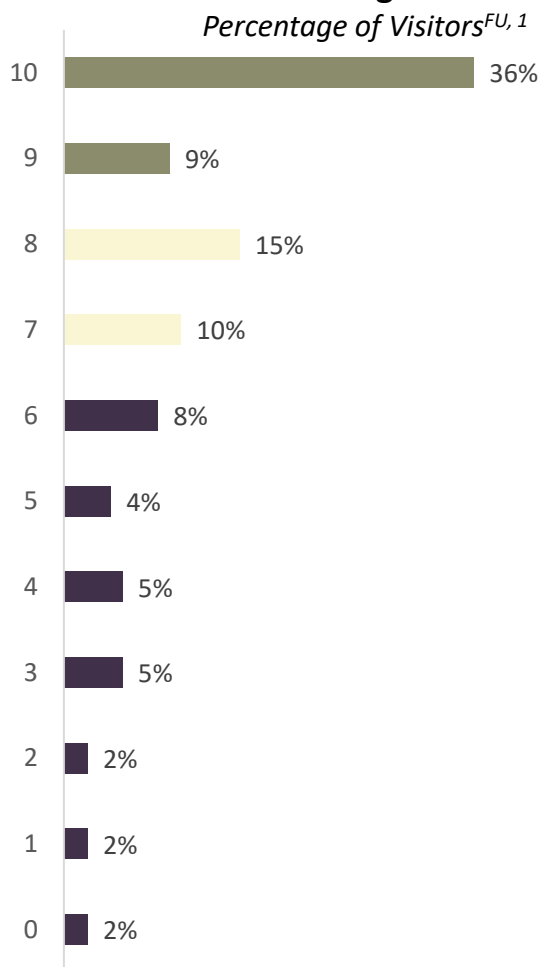
Percentage of Visitors<sup>FU</sup>



	Day Visitors	Overnight Visitors	All Visitors
Average Likelihood to Return for a <b>Day Trip</b>	3.7	3.4	3.5
Average Likelihood to Return <b>Overnight</b>	1.8	3.6	2.9

### 3.6.3. Net Promoter Score (NPS)

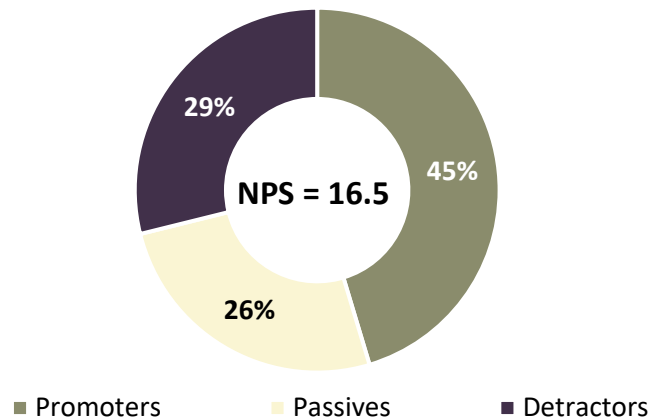
**How Would You Rate Your Likelihood To Recommend Abbotsford As A Travel Destination To Friends/Family Or A Colleague?**



Scale: 0 = Not Likely At All and 10 = Extremely Likely

### Abbotsford's Overall Net Promoter Score

Percentage of Visitors<sup>FU, 1</sup>



### NPS By Market:

BC = 10.2

	Day Visitors	Overnight Visitors
<b>NPS Segment</b>		
Promoters	43%	21%
Passives	26%	26%
Detractors	31%	53%
<b>NPS Score</b>	-11.5	32.2

What about your trip to Abbotsford led to your {NPS RATING} out of 10 (Extremely Likely) response?		
Coded Grouping	Percentage of Responses <sup>1</sup>	Examples
POSITIVE: General/Other	35%	<i>Everything, I always enjoy coming back to Abbotsford.</i>
POSITIVE: Friendly/Helpful People	28%	<i>Friendly people Again the friendly helpful people, the ease of getting around, the views ie: mountains, farm fields the airport is so accessible.</i>
POSITIVE: Beautiful/Scenery	13%	<i>Abbotsford is a great local area that has a lot of natural scenery, that for tourists and travelers would enjoy.</i>
POSITIVE: Outdoor Activities	13%	<i>Beautiful location close to lots of outdoor activities.</i>
POSITIVE: Parks	13%	<i>Beautiful parks and hikes. Very nice people and great food Great July 1 parade and festivities in the park, nice fireworks after. Mill Lake is very beautiful for a nice walk or to take the kids to the park.</i>
POSITIVE: Farms/Agriculture/Produce/Dairy	12%	<i>Beautiful location, lots of dining and love the farm tours I loved the hiking and farming areas</i>
POSITIVE: Food & Beverage	10%	<i>Lots of great restaurants and hiking trails We really enjoyed exploring the parks, found delicious restaurants, had fun at a winery, and enjoyed the wild blackberries!</i>
POSITIVE: Lots of Activities	10%	<i>Very friendly people, great restaurants, lots of available activities. As we toured around there were lots of sites, activities and amenities.</i>
POSITIVE: Good Location/Convenient Location	9%	<i>Again the friendly helpful people, the ease of getting around, the views ie: mountains, farm fields the airport is so accessible.</i>
NEUTRAL: Event Only/Not Enough Time to Learn about Destination	6%	<i>I was only there for Geo Woodstock, no plans to return unless there is another major geocaching event. Didn't really explore too much of the city itself.</i>
POSITIVE: Shopping	6%	<i>It has some lovely shops and some interesting hidden gems.</i>
POSITIVE: Event(s)	6%	<i>I would highly recommend the air show to others and have done so as well as the Girls Fly Too event happening in October. I just recommended the Discovery Trail to someone for bike riding and I love the downtown shops.</i>
POSITIVE: River	5%	<i>Friendly town with lots to see and do Beautiful Fraser River valley. Abbotsford is a nice community close to Fraser River and gold country destinations.</i>
POSITIVE: My Family	4%	<i>My family is there.</i>
NEGATIVE: Traffic	4%	<i>Traffic and lack of shade at the airshow. Traffic organization was bad to attend the Abby Airshow. Event organizers probably did not properly coordinate with the city.</i>

2022 Abbotsford Summer Visitor Survey

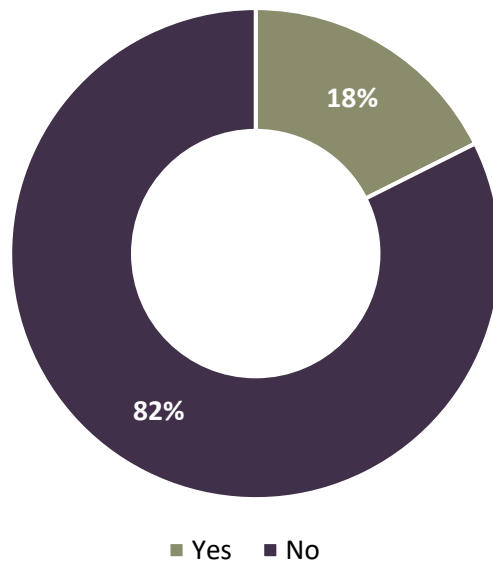
NEGATIVE: Other	3%	<i>I would recommend Abbotsford and Fraser Valley in general esp. in summer for fruit picking and sales, for Circle Farm Tours and for geocaching day trips. But Abby is fairly urban so not a holiday destination in my mind.</i>
NEGATIVE: Accommodations	3%	<i>Nice place, lots to do, tough to find a camping spot.</i>
POSITIVE: Cheaper Gas	3%	<i>Interesting places to see and experience the trails. Cheaper gas than Vancouver.</i>
NEUTRAL: Too Far to Recommend	3%	<i>I very much enjoyed my visit but given I live so far away I am very unlikely to come back within 2 years.</i>
NEUTRAL: Don't Recommend Destinations Generally	3%	<i>I just don't recommend locations to travel to people unless asked.</i>
NEGATIVE: Homelessness/Social Issues	3%	<i>Too many homeless and high crime rate. Too high of prices. Outrageous price for a nasty hotel. Highways/roads always too busy. Beautiful area but I never want to return.</i>
POSITIVE: Attractions	1%	<i>Good food, fun attractions, fresh farm produce!</i>
NEGATIVE: More Product Needed	1%	<i>Abbotsford needs more recreational places to draw people there. More than one decent water park, more extensive cycling or walking trails through parks, more food trucks in the parks at better hours, maybe allow buskers as entertainment in parks, we miss the concert series in the parks, have more festivals throughout the year, protect the green spaces that already exist from development and increase the amount of green space in the city.</i>
NEGATIVE: Too Close	1%	<i>I live in maple ridge, Abbotsford isn't really a remote destination.</i>
NEGATIVE: Shopping	1%	<i>I enjoyed the town immensely! It was right off the highway and had great parks and access to the outdoors. I wish I would have been able to visit some of the local shops, for several when I tried to go they were closed.</i>

1. 78 visitors suggested 152 reasons for their NPS rating. Totals do not add to 100% because one visitor suggested multiple highlights. Each comment has multiple codes attached therefore can have both positive and negative codes. Examples contain associated code but may also feature other codes.

### 3.6.4. New Products, Services and Experiences

#### Are There Any New Or Expanded Products, Services Or Experiences That Would Enhance Your Visit to Abbotsford?

Percentage of Visitors<sup>FU</sup>



New Product, Services, Experiences – Suggestions <sup>1</sup>
More outdoor recreation opportunities
An additional spray park would be a huge benefit - mill lake is too busy
Paint ball
Fairgrounds or other city owned land with an RV Park
Historic Gurdwara (Sikh worship place)
Need lululemon and Aritzia store
Access to currency exchanges/information
I did not realize how close to the border you were until I got here.
More Geocaching Adventure Labs
Better/more frequent routes to get there for commuters without cars
Found the people of Abbotsford very helpful and friendly!
I stayed in the Super 8 because of previous stays and the breakfast provision. I was very disappointed with their present offer.

1. 12 visitors made 12 recommendations therefore verbatims are shown.

## 4.0. CONCLUSIONS

The main conclusions from this Visitor Study are summarized below:

1. Day Visitors are notably different than Overnights Visitors.
2. It is important to convert Day Visitors to promoters of the destination by addressing some of the barriers they may feel about being a champion of the destination. These may include Abbotsford being in close proximity and an understanding that not everyone has discovered Abbotsford.
3. Overnight Visitors, although more positive about the destination, have an opportunity to improve their perception of Abbotsford as well. In particular, many event-goers had little exposure to other Abbotsford tourism products and experiences therefore were unable to speak about the destination to other travellers.
4. Tourism Abbotsford has a challenge about its perception around heavy traffic, poor local transportation and lack of appeal as a city but too urban for a rural escape.
5. Travel to Abbotsford because of the airport should be leveraged. In fact, 14% of visitors were spending time in Abbotsford due to the airport. This may include visitors departing or arriving in Abbotsford with final destinations in other areas. Targeting this segment for add on days and/or activities may prove fruitful.
6. Strengths such as events, craft breweries, agri-tourism, hiking and biking should be highlighted while efforts should be made to mitigate weaknesses in perceptions such as crime, homelessness, traffic, and little to do.
7. Social media is underperforming given that 40% of visitors are sharing about their experiences in the destination; however, only 2% are using the #ExploreAbbotsford tag.



## APPENDICES

Appendix A. Questionnaires

Appendix B. Other NPS Results

## Appendix A. Questionnaires

### A1. Onsite Survey

Interviewer: \_\_\_\_\_

S1. Date: \_\_\_\_\_

S2. Location:

---

1. **My name is \${INTERVIEWER} and I'm conducting a survey on behalf of Tourism Abbotsford. May I ask you some questions for visitors to the area?**  
**IF NEEDED: The survey will take approximately 3-5 minutes.**
  - a. Yes
  - b. No – Local Resident
  - c. No – Other | **RECORD GENDER, THANK & TERMINATE**
  
2. **Have you or anyone in your travel party already been approached to complete a survey by Tourism Abbotsford on this trip?** By travel party, we mean the people who are sharing expenses during the trip.
  - a. Yes | **RECORD GENDER, THANK & TERMINATE.**
  - b. No
  
3. **What is the primary purpose of this trip to Abbotsford? Is it for...** [READ]
  - a. Leisure (IF NEEDED: Vacation)
  - b. Visiting friends and family
  - c. Business travel or attending a conference
  - a. Other (education, medical or other reasons) | **RECORD GENDER, THANK & TERMINATE**
  - b. NOT ON A TRIP | **RECORD GENDER, THANK & TERMINATE**
  
4. **ASK IF Q3=BUSINESS TRAVEL OR ATTENDING A CONFERENCE, In order to participate in leisure activities, is your travel party staying any extra time in Abbotsford?**
  - a. Yes
  - b. No | **RECORD GENDER, THANK & TERMINATE.**
  - c. Don't Know/Refused | **RECORD GENDER, THANK & TERMINATE.**

**5. Where do you live?**

IF NEEDED: *Defined as your usual place of residence...*

- a. Abbotsford | **RECORD GENDER, THANK & TERMINATE.**
- b. Greater Vancouver (Vancouver, Richmond, Burnaby, North Vancouver, West Vancouver, New Westminister, Port Moody, Port Coquitlam, Coquitlam, Pitt Meadows, Maple Ridge, Delta, Surrey, Langley)
- c. Fraser Valley (Mission, Chilliwack, Hope)
- d. Another part of BC
- e. Other Canada
- f. USA
- g. Overseas

**6. IF Q5=Other Canada, What province do you live in?**

- a. Alberta
- b. Ontario
- c. Quebec
- d. Manitoba
- e. Saskatchewan
- f. Nova Scotia
- g. New Brunswick
- h. Newfoundland
- i. PEI
- j. Yukon
- k. NWT
- l. Nunavut
- m. PREFER NOT TO ANSWER

**7. IF Q5 = USA, What State do you live in?**

- a. USA – Washington
- b. USA – California
- c. USA – Oregon
- d. USA – Idaho
- e. USA – New York
- f. USA – Texas
- g. USA – Florida
- h. USA – Illinois
- i. USA – Colorado

- j. USA – Arizona
- k. USA – Michigan
- l. USA - Other: Write In: \_\_\_\_\_ \*
- m. PREFER NOT TO ANSWER

8. ASK IF Q5=A,B,C,D,E, **What is your postal code?** *Please note, providing a full postal code helps us better understand our visitors.*

\_\_\_\_\_ [i.e. V5N0M2, alpha-numeric, no spaces]  
 a. PREFER NOT TO ANSWER

9. ASK IF Q5=USA, **What is your zip code?** *Please note, providing a 5-digit zip code helps us better understand our visitors.*

\_\_\_\_\_ [i.e. 90210, 5-digit numeric zip code]  
 a. PREFER NOT TO ANSWER

10. **Including yourself, how many people are in your travel party on this trip? How many are children under 18 and how many are adults? (Travel party includes individuals who have the same itinerary and/or shared expenses.) Please enter the number in each category. If none, please enter '0'.**

a. \_\_\_\_\_ Adult(s) + \_\_\_\_\_ Child(ren) (under 18) = \_\_\_\_\_ Total [AUTOSUM]  
 b. Don't know

11. **How many nights are you away from home on this trip?**

*Fill in the number of nights, the answer should be a numeric value. The value should be less than 365.*

Nights \_\_\_\_\_ [RECORDE NUMBER, VALID = 0 THRU 364]  
 a. Don't know

12. **Are you in Abbotsford...?** [READ]

- a. just for the day
- b. Or are you staying overnight [IF NEEDED: At least one night]

13. **IF Q12=a, How many hours are you in Abbotsford today?**

\_\_\_\_\_ Hours

14. **IF Q12=b, How many nights are you staying in Abbotsford?**

\_\_\_\_\_ Nights

**15. What is your primary destination on this trip?**

- a. Abbotsford
- b. Other Lower Mainland Location (i.e. Vancouver, Surrey, Langley, Chilliwack)
- c. Other BC
- d. Rest of Canada
- e. USA
- f. Mexico
- g. Overseas
- h. Cruise
- i. No primary destination – touring trip
- j. Other
- k. Don't Know/No Response

**16. How did you get to Abbotsford? [IF NEEDED: How did you get here from home?]**

- a. Private Vehicle
- b. Rented Vehicle
- c. Bus/Tour Group
- d. Public Transportation
- e. Airplane
- f. Other, please specify: \_\_\_\_\_

**Should Q17 have clarifier – If 16 is e then ask this one – I considered it but I think we should keep it open if someone is driving in to Abbotsford and then flying out. (i.e. from Hope then flying out/back) so they may say private vehicle in Q16 but say yes to Q17.**

**17. Are you spending time in Abbotsford primarily because you flew in, or are flying out of Abbotsford International Airport?**

- a. Yes
- b. No

**18. While in Abbotsford, which leisure activities do you plan on doing or have your done?**

- a. Shopping
- b. Dining
- c. Historic Downtown Abbotsford
- d. Castle Fun Park
- e. Escape Rooms
- f. Paintball park
- g. U-pick farm

- h. Farmers market
- i. Farms
- j. Sporting Events
- k. Visiting Friends and Family
- l. Going to Parks
- m. Golfing
- n. Gambling / Chances Casino
- o. Historic Sites/Museum/Art Gallery
- p. Visiting a Temple / Religious Building
- q. Visiting a Winery / Brewery
- r. Biking
- s. Hiking
- t. Other entertainment including Bowling, Theatre, Movies, Concerts, or Waterpark
- u. Other \_\_\_\_\_

**19. ASK IF NOT A DAY VISITOR, Which of the following best describes your primary (most often used) type of accommodation on this trip while in Abbotsford? [IF NEEDED,PROBE: Would that be...[READ]]**

- a. Hotel
- b. Motel
- c. B&B / Guest House
- d. Vacation Rental / Airbnb / VRBO / Other 'Sharing Economy' Accommodation
- e. Campground / RV Park
- f. Friends and/or Family
- g. Other, please specify: \_\_\_\_\_

**20. Thinking about accommodations if applicable, food, activities, shopping and transportation, approximately how much will your travel party spend on this trip while in Abbotsford?**

- \$ \_\_\_\_\_
- Don't Know/No Response

**21. How many times have you visited Abbotsford for leisure purposes in the past two years?**

- a. None
- b. \_\_\_\_\_
- c. Don't Know/Recall

**22. ASK IF Q21>0, And how many of those times, if any, have you stayed overnight in Abbotsford in the past two years?**

- a. None
- b. \_\_\_\_\_
- c. Don't Know/Recall

**Lastly, just a few questions for statistical purposes...**

**23. In which of the following age categories are you? Are you...**

*Choose one response.*

- a. 19-24 years
- b. 25-34 years
- c. 35-44 years
- d. 45-54 years
- e. 55-64 years
- f. 65-74 years
- g. 75 years or older
- h. Prefer not to answer

**24. What gender do you identify as? Please select one response.**

- a. Female/Woman/Feminine
- b. Male/Man/Masculine
- c. Non-Binary, Gender Fluid, and/or Two-Spirit
- d. My gender identity is not listed, please specify \_\_\_\_\_
- e. Prefer not to answer / don't know

**25. Thank you for your time today - your participation is very much appreciated. As a follow-up to this interview, we would like to contact you in a few weeks after you get home to ask a bit more about your trip. This would involve being contacted via email and completing a short online survey. All personal contact information will be kept completely confidential. Your email will NOT be shared and will only used for this one study. By completing the follow up questionnaire, you will be eligible for a draw to win one of three pre-paid gift cards valued at \$100, \$150 and \$250 [IF NEEDED: they are pre-paid Visa Gift Cards in Canadian dollars and accepted worldwide]. Would you be willing to participate?**

- 1. Yes
- 2. No - go to THANKS & CLOSE

**26. What email should we use for that purpose?**

\_\_\_\_\_@\_\_\_\_\_.

**That concludes our interview. Thank you again for taking the time to speak with me today. Have a wonderful day and enjoy your time in Abbotsford.**

## A2. Follow Up Survey

### Section 1. About your trip...

If you have travelled to Abbotsford more than once this year, please think about the trip during which you were asked to participate in this survey, while in the Abbotsford.

**Q1. On that trip, you anticipated staying in Abbotsford for [insert # of nights]. Is that how long you stayed in the Abbotsford?**

1. Yes
2. No
3. Don't know/don't recall
4. Prefer not to answer

**Q2. IF Q1=NO, How many nights did you stay in Abbotsford?**

- \_\_\_\_\_ [NUMERIC, VALID = 0-100]
1. Don't know/don't recall
  2. Prefer not to answer

**Q3. How important were each of the following factors in deciding to visit Abbotsford versus another location?**

*Please select one response for every row.\**

	1 - Not Important At All	2	3	4	5 - Extremely Important	99 Don't Know
Is a good stop on route to another destination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not too far from home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is familiar/I've been there before	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has sporting events that I am interested in watching or participating in	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has beginner and intermediate access to outdoor recreational activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is a good family destination	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The community is close in proximity to nature and wilderness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The community is close in proximity to national parks and other protected areas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Has friendly, hospitable people	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Has concerts and/or public events that I wanted to attend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There was a personal event (e.g. Wedding, Family Reunion) that I wanted to attend	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It is a new place to explore	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offers good value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have friends and family that live in Abbotsford	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q4. When planning your trip, did you and/or your travel party consider staying in/visiting destinations other than Abbotsford?**

- Yes
- No
- Don't Know

**Q5. ASK IF Q4=YES, What other destinations did you/your travel party consider?** Please list up to three. If you don't know please type 'None'.\*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Q6. What was your primary motivation to visit Abbotsford?** Choose one.

- a. Attending a Private Event (e.g. Wedding)
- b. Participate in Outdoor Recreation (i.e. fishing, biking, golf, hiking, birding)
- c. Attending a Concert / Festival or Sporting Event
- d. Participating in a Sporting Event (e.g. softball tournament, )
- e. Visiting an attraction (e.g. Mill Lake, , Maan Farms, Field House Brewing Co., EcoDairy, etc)
- f. Visiting Friends and Relatives
- g. Sightseeing/Nature/Wildlife
- h. Other General Vacation
- i. Break from Driving/Convenient Place to Stop
- j. Business/Corporate Meeting or Event
- k. Other Reason (Education, Medical or Other Reasons). Write In: \_\_\_\_\_\*

**Q7. What activities, if any, did you and/or your travel party participate in while in Abbotsford?** Please select all that apply.

- a. Mountain Biking
- a. Road Biking
- b. Birding
- c. Fishing
- d. Hiking
- e. Golfing
- f. Indigenous (First Nations) experiences
- g. Skydiving
- h. Kayaking / Canoeing / Paddle Boarding
- i. Aerial Tours
- j. Playing sports
- k. Breweries
- l. Wineries
- m. Farm Experiences (Circle Farm Tour)
- n. Sampling local cuisine / culinary experiences
- o. Concerts
- p. Plays/Musicals
- q. Festivals, Fairs or Events
- r. Watching live sports
- s. Museums / Art Galleries
- t. Shopping
- u. Spa
- v. Visiting friends / relatives
- w. Other, please specify: \_\_\_\_\_ [ANCHOR ABOVE NONE OF THE ABOVE]
- x. None of the above [EXCLUSIVE – ANCHOR]

**Q8. Did you share any of your experiences from Abbotsford on social media? Please select all that apply.**

- 1. Yes, and tagged #ExploreAbbotsford
- 2. Yes, and tagged #TheFraserValley
- 3. Yes, but did not use #ExploreAbbotsford or #TheFraserValley [EXCLUSIVE]
- 4. No [EXCLUSIVE]
- 5. Don't Know/Recall [EXCLUSIVE]
- 6. Prefer not to answer [EXCLUSIVE]

**Section 2. Information and Planning...**

We are interested in learning how you researched and planned your trip, both before leaving home and during your trip. Information from this series of questions will help Tourism Abbotsford better understand how they can provide visitors with the information they need, when they need it.

**Q9. Tourism Abbotsford offers a range of visitor information services. Which of the following, if any, did you use before or during your trip to Abbotsford, BC? Please select all that apply.**

- Visited the Tourism Abbotsford website (www.tourismabbotsford.ca)
- Called the Tourism Abbotsford office
- Emailed the Tourism Abbotsford office
- ASK IF NOT RECUITED AT VC, **Visited the Visitor Centre Kiosk located inside the Abbotsford International Airport (YXX)**
- Connected with mobile Visitor Services staff located around Abbotsford
- Did not use any of these information services [EXCLUSIVE]
- Don't know/don't recall [EXCLUSIVE]
- Prefer not to answer [EXCLUSIVE]

**Q10. Are you aware that there is a free Explore Abbotsford App available? Please select one**

- a. Yes, and I used while in Abbotsford
- b. Yes, but did not use it while in Abbotsford
- c. No [EXCLUSIVE]
- d. Don't Know/Recall [EXCLUSIVE]
- e. Prefer not to answer [EXCLUSIVE]

**Q11. Thinking about the following information topics, please indicate if you obtained information on this topic from Tourism Abbotsford, and/or another source in Abbotsford (e.g. talked to people, online or from somewhere else in Abbotsford) or if you did not obtain information on this topic while in Abbotsford.**

*Please check all that apply per row.*

	Obtained Information from Tourism Abbotsford (Mobile Visitor Counsellors, Website, Visitor Kiosk at YXX)	Obtained Information from Another Source While in Abbotsford	Did NOT Obtain Information While in Abbotsford [EXCLUSIVE]
Accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attractions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Restaurants/Dining	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q12. Based on your experience and/or information you received while in Abbotsford on this trip, did you do any of the following?**

- a. Staying longer in Abbotsford than I originally anticipated
- b. Participating in activities in Abbotsford that I didn't originally plan on doing
- c. Spending money that I hadn't planned on spending while in Abbotsford
- d. None of the above

**Section 3. Experience...**

**We would like to better understand your overall experience in Abbotsford and how we may improve.**

**Q13. Did you spend any time in the Historic downtown area of Abbotsford?** The Historic downtown area surrounds the [TBD]. For reference, the general area is noted in the map below.

*Please select one response.\**

[MAP]

- Yes
- No
- Don't Know

**Q14. ASK IF Q13=YES, What would make you more likely to spend time/spend more time in the Historic downtown area of Abbotsford? Please select all that apply. \***

- More Unique Shops
- More Dining Options
- Longer Opening Hours at Retail Hours
- Longer Opening Hours at Restaurants
- Street Festival/Event

- Central Open-Air Gathering Place/Town Square
- Pedestrian Only Zone (no vehicle area)
- More Parking for cars/trucks/SUVs
- More Parking for RVs/Campers
- Increased Safety
- General Beautification
- More Accommodations Nearby
- Other (please specify: \_\_\_\_\_)

**Q15. Overall, how satisfied are you with your trip while in Abbotsford?**

- 1 – Very dissatisfied
- 2 – Somewhat satisfied
- 3 – Neither satisfied nor dissatisfied
- 4 – Somewhat satisfied
- 5 – Very satisfied
- Prefer not to answer [EXCLUSIVE]

**Q16. How satisfied are you with each of the following aspects of your trip while in Abbotsford?**

*Please select one response per row.*

	1 – Very dissatisfied	2 – Somewhat dissatisfied	3 – Neither Satisfied Nor Dissatisfied	4 – Somewhat satisfied	5 – Very satisfied	98. Not applicable	99. Prefer not to answer
<b>a. Accommodations</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>b. Events</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>c. Attractions</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>d. Restaurants/Dining</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>e. Entertainment, arts and culture</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

<b>f. Local transportation</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>g. Shopping</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>h. Quality of visitor information services while in Abbotsford</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>i. Frontline staff</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>j. Directional Signage</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Q17. What highlights, if any, did Abbotsford have as a travel destination?**

*Please list up to three highlights.*

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

98. No highlights

99. Prefer not to answer

**Q18. What shortcomings, if any, did Abbotsford have as a travel destination?**

*Please list up to three shortcomings.*

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

98. No shortcomings

99. Prefer not to answer

Q19. Are there other new or expanded products, services or experiences that would have enhanced your visit to Abbotsford? Please select one response.\*

- Yes, What are they? \_\_\_\_\_
- No
- Don't Know

Q20. Given your experience in Abbotsford, how likely are you to do each of the following in the next two years? Please use a scale of 1 to 5 where 1 is 'Not at all Likely' and 5 is 'Extremely Likely'. Please select one response for each row.

	1 – Not at all Likely	2	3	4	5 – Extremely Likely	99. Don't know/Prefer not to answer
a. Spend time in Abbotsford on a day trip while staying overnight elsewhere in Greater Vancouver or Fraser Valley	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Stay overnight in Abbotsford	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q21. On a scale of 0 to 10 where 0 is 'Not Likely at All' and 10 is 'Extremely likely', how would you rate your likelihood to recommend Abbotsford as a travel destination or a place to visit to friends, family or colleagues?

- 0 – Not at all likely
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

- 10 – Extremely likely
- 99 – Prefer not to answer

Q22. What about your trip to Abbotsford led to your {{ Q21 }} out of 10 (Extremely Likely) response? Please be as specific as possible.

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**Section 4. Expenditures: It is very important to understand the economic impact travellers have on their destination. This short section asks about your travel party’s expenditures while in Abbotsford.**

Q23. In Canadian dollars, what were your travel party’s total expenditures while in Abbotsford?

*Please include all purchases, taxes and tips while in Abbotsford. Include car rentals only if rented in Abbotsford. Exclude any flights to/from Abbotsford. If you pre-paid any items prior to leaving on your trip (e.g. accommodation, tours, etc.), please include these in your estimate. An estimate is fine.*

- Canadian Dollars: \$: \_\_\_\_\_
- Don't Know
- Prefer Not to Answer

Q24. Approximately what percentage of your party’s total expenditures while in Abbotsford were attributed to the following categories?

*Please enter the appropriate proportions below, excluding long-haul flights outside of British Columbia. Please insert '0' for those categories you did not spend any money in. The sum of your answers should equal 100%.\**

	Accommodation (hotels, motels, lodge, camping/RV fees, etc.)
	Transportation (taxi, bus, rental vehicle, etc.)
	Food and Beverage (dining, drinking including taxes and tips)
	Shopping (clothing, art, gifts, books, etc.)
	Attractions and Tours (admission, shows, tours, etc.)
	Outdoor Recreation (park pass, nature guide, etc.)
	Other Entertainment and Activities (concerts, theatre, casino, spa, etc.)
	Other Expenditures
100%	Total



**Section 5. Travel in the Fraser Valley**

Q25. **Other than Abbotsford, which cities/communities or areas in the Fraser Valley, if any, did you visit (stop for tourism purposes) in while on this trip?** *Please select all that apply.*

[INSERT MAP AS REFERENCE]

1. Boston Bar
2. Langley
3. Chilliwack
4. Harrison Hot Springs
5. Hope
6. Kent
7. Mission
8. Yale
9. Are(a)s north of Harrison Lake
10. Area(s) on the north side of Pitt Lake
11. Area(s) on the east side of Pitt Lake
12. Other area(s) of the Fraser Valley
13. I did not visit other cities/communities or areas [EXCLUSIVE]

**Section 6. And finally, just a few questions for statistical purposes...**

Q26. **What is the highest level of education you have completed?** *Please select one response.*

- a. Less than high school
- b. High school
- c. Some technical college or university
- d. College or technical diploma
- e. Undergraduate degree
- f. Graduate degree
- g. Other, please specify: \_\_\_\_\_
- h. Prefer not to say

Q27. **Before taxes, what is your approximate annual household income in Canadian dollars? Please select one response.**

- a. \$49,999 or less per year
- b. \$50,000 - \$74,999
- c. \$75,000 - \$99,999
- d. \$100,000 - \$149,999
- e. \$150,000 - \$199,999
- f. \$200,000 - \$249,999
- g. \$250,000 or more
- h. Prefer not to say

**Thank you for your time. Your feedback is helpful and appreciated.**

Q28. **You are eligible to be entered into a draw for to win one of three pre-paid gift cards valued at \$100, \$150 and \$250We will need your first name, telephone number and/or email address. This information will be kept confidential and used only to administer the draw. Would you like to be entered into the draw?**

- 1. Yes
- 2. No

**IF YES,** Please provide the following:

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_@\_\_\_\_\_. \_\_\_\_\_

**That completes the survey. Thank you!**

## Appendix B. Other NPS Results

Other published NPSs for tourism destinations include:

- British Columbia's NPS was 59.5 in 2017.<sup>5</sup> Destination British Columbia tracks NPS annually and targets an improvement of 0.5 points per year and saw a slight increase from 2016 NPS = 58.3, but declined from 2015 NPS = 63.3 and 2014 NPS = 68 (2014). Destination British Columbia notes this may be due to a survey design effect. Since 2017, NPS score reporting is based on relative scores in specified markets therefore actual score is not detailed in annual service plans. It should be noted that post-pandemic, benchmarks are being re-established as well.
- Destination Canada's Global Tourism Watch studies measures the NPS for Canada through surveys of long-haul travellers in key markets around the world. Since the Pandemic, all NPS data is normalized and presented only as relative graphs therefore individual scores are not published. The most recent scores reported is 2018. In 2018, Canada's NPS varies by market, including: Mexico (2018 NPS = 61), India (2018 NPS = 39), Germany (2018 NPS = 22), China (2018 NPS = 20), the United Kingdom (2018 NPS = 20), Australia (2018 NPS = 23), France (2018 NPS = 28), the United States (2018 NPS = 17), South Korea (2018 NPS = -3) and Japan (2018 NPS = -20). The latest domestic NPS for Canadian residents was in 2017 which had a score of 35.<sup>6</sup>
- New Zealand's Visitor Experience Monitor tracked the NPS for international visitors in 2018. Overall New Zealand has an NPS of 86. In 2018, New Zealand's NPS by market were: Unites States (NPS = 86), the UK (NPS = 88), Australia (NPS = 80), Germany (NPS = 70), China (NPS = 69) and Japan (NPS = 60).<sup>7</sup>
- Tourism Golden conducted a Visitor Study in the summer of 2019 as part of an ongoing annual project. Their NPS measured 51.3 which was up from 31.8 in 2017.<sup>8</sup>
- Destination Greater Victoria conducted a year-round Visitor Study in 2018/19 which measured the annual NPS as 78 while the summer NPS was 74.<sup>9</sup>
- Tourism Kelowna measured Kelowna's NPS in 2018 and 2016. The total over three seasons was 2018 NPS = 65 and results varied by season (spring NPS = 78, summer NPS = 56 and fall NPS = 65). In 2016, the overall result was 2016 NPS = 65, results varied by season (spring NPS = 72, summer NPS = 53 and fall NPS = 67)<sup>10</sup>
- Tourism Nanaimo has measured Nanaimo's NPS in peak season of 2017, 2016 and 2015. 2017 NPS = 16, 2016 NPS = 30, 2016 NPS = 41.<sup>11</sup>

<sup>5</sup> Measured short-haul markets only. [https://www.destinationbc.ca/content/uploads/2018/11/2017-18-DBC-ASPR\\_FINAL.pdf](https://www.destinationbc.ca/content/uploads/2018/11/2017-18-DBC-ASPR_FINAL.pdf)

<sup>6</sup> Destination Canada 2018. Global Tourism Watch Reports. <https://www.destinationcanada.com/en/global-tourism-watch>

<sup>7</sup> Tourism New Zealand Insight Team. 2018. Visitor Experience Monitor 2017 Infographic. <https://www.tourismnewzealand.com/media/3423/visitor-experience-infographic-april-2018.pdf>

<sup>8</sup> Tourism Golden, retrieved from: <https://www.tourismgolden.com/sites/default/files/2019-Golden%20Summer%20Visitors%202019%20FINAL.pdf>

<sup>9</sup> Destination Greater Victoria, retrieved from: [https://www.tourismvictoria.com/sites/default/files/dgv\\_2019\\_visitor\\_survey\\_report\\_final.pdf](https://www.tourismvictoria.com/sites/default/files/dgv_2019_visitor_survey_report_final.pdf)

<sup>10</sup> [https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/kelowna/2018\\_Visitor\\_Intercept\\_Survey\\_\\_39864534-92ba-4880-9de4-b8000a1476cf.pdf](https://assets.simpleviewinc.com/simpleview/image/upload/v1/clients/kelowna/2018_Visitor_Intercept_Survey__39864534-92ba-4880-9de4-b8000a1476cf.pdf)

<sup>11</sup> The Sociable Scientists for Tourism Nanaimo. 2016. <https://www.tourismnanaimo.com/wp-content/uploads/2017/06/VES15-Nanaimo-Profile-FINAL-Nov22.pdf>

- Steamboat Springs, Colorado<sup>12</sup> has measured NPS since 2010 (2010 NPS = 75, 2014 NPS = 67).
- Bend, Oregon measured NPS over a five year period.<sup>13</sup> In winter 2016/17 Bend achieved a NPS = 78, while summer 2016 NPS = 82 and winter 2015/16 NPS = 80. These scores were higher than past summer visitor research (NPS 2013 = 79, NPS 2012 = 75, NPS 2009 = 65 and NPS 2008 = 58).
- NPS was measured for Australian destinations in 2006 with scores ranging from -55 (Adelaide) to 80 (Broome).<sup>14</sup>

Past research has shown that NPS in the tourism industry can vary by<sup>15</sup>:

- Market of origin (this could be a result of actual experience differences or interpretation of response scales),
- Repeat vs. first time visitors,
- Household composition (households with children, households without children, empty nesters),
- Community length of stay (day vs. overnight visitors),
- Primary trip purpose (business vs. leisure trips),
- Destination characteristics (factors) that drive destination selection, and
- Seasonal visits, probably related to primary trip activity (e.g. ski/winter vs. summer).

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<sup>12</sup> Mount, I. (2014). A Whole Town in Colorado Pushes to Improve its Customer Service. New York Times. [http://www.nytimes.com/2014/10/16/business/smallbusiness/a-whole-town-tries-to-improve-its-customer-service-how-could-we-be-a-70.html?\\_r=0](http://www.nytimes.com/2014/10/16/business/smallbusiness/a-whole-town-tries-to-improve-its-customer-service-how-could-we-be-a-70.html?_r=0)

<sup>13</sup> RRC Associates Inc. 2016. Bend Area Winter Visitor Survey—Final Results 2016/17. Prepared for Visit Bend. <https://www.visitbend.com/wp-content/uploads/2018/03/Bend-Winter-16-17-Visitor-Survey-FINAL.pdf>

<sup>14</sup> Ritson, Mark (2006). Net Promoter Scores Australia 2006. Melbourne Business School.

<sup>15</sup> This list has been compiled from a variety of sources including results from the Bend, Oregon study, the Destination Canada's Global Tourism Watch studies, New Zealand's Visitor Experience Monitor, Destination BC and other confidential sources.