

# 2008 Vancouver Island Visitor Exit Survey

*Prepared by:*

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Tourism Vancouver Island is an Agent of Tourism British Columbia

*The Government of Canada has contributed funding to this initiative.*



## Acknowledgements

Tourism Vancouver Island would like to thank the visitors who participated in the 2008 Vancouver Island Visitor Exit Survey. We would also like to thank the organizations that gave permission to survey at their locations and to the staff who welcomed us at BCF Swartz Bay, BCF Duke Point, BCF Comox, BCF Port Hardy, MV Coho, MV Clipper, Victoria International Airport, Nanaimo Regional Airport, Comox Regional Airport, Campbell River Regional Airport, Port Hardy Regional Airport, Harbour Air Nanaimo and Harbour Air Victoria.

We would also like to the Research and Planning department at Tourism British Columbia for providing technical assistance as well as Dr. Nicole Vaugeois and Lea Thuot, Vancouver Island University, for providing data analysis and guidance.

Thank you to Service Canada for providing funding assistance for the 2008 Vancouver Island Visitor Exit Survey.

And, last but not least, we would like to thank Jan Moore, Brian James and Jim Chutka, the intrepid research team who braved all four seasons in a few short months to gather this very important research data.

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## EXECUTIVE SUMMARY

The 2008 Tourism Vancouver Island Visitor Exit Survey was conducted to discover the origin of visitors to the Vancouver Island Region; their motivation for visiting; which of the seven Vancouver Island Regions they had spent the most time; the level of trip satisfaction; and to determine the information sources visitors had used to plan their trip.

The Visitor Exit Survey was designed to gather data on the motivation and travel experience of the tourism markets visiting the Vancouver Island Region from off-Island. The results will assist the tourism industry by identifying: 1) Where visitors are visiting from, 2) Primary motivation of visitors, 3) Information sources used to plan visit, 4) Most popular sub-regions visited, 5) The likelihood of repeat visits and 6) Anecdotal comments from visitors to the Region.

Permission was secured to conduct surveys at 13 exit points on Vancouver Island with a projected target of 5,000 surveys within a five-month period. In total, 4,473 people were interviewed, with 2,637 completed surveys of non-Vancouver Island Region residents. The survey was conducted at BC Ferry Terminals, Regional Airports, MV Coho, MV Clipper and Harbour Air Float Plane Terminals. Visitor exit data was collected April 2 to September 5, 2008.

The survey questionnaire was developed with the assistance of Tourism British Columbia (TBC) who also provided technical support and training in the use of Palm Pilot PDA data collection equipment. The questionnaire design was based on existing TBC questionnaires to provide a parallel base line to existing TBC studies.

A three-person research team was assembled to conduct the visitor surveys electronically at Vancouver Island exit points from Port Hardy to Victoria. The research team estimated a representative sample size for each location based somewhat proportionately on exit location traffic.

Tourism Vancouver Island recognizes seven distinct marketing regions within the Vancouver Island Region: South Island, South Central, Central Island, Pacific Rim, North Central, North Island and the Gulf Islands. Researchers asked visitors about time spent in all seven regions.

Researchers intercepted visitors randomly at each of the 13 exit points. At less busy venues, such as Port Hardy regional airport and float plane terminals, all visitors were asked to participate in the survey because visitor traffic was inadequate for random sampling.

Survey data was downloaded on a regular basis into a database at Tourism Vancouver Island's offices. This data was subsequently transferred into the Statistical Package for the

Social Sciences (SPSS) program at Vancouver Island University. University staff assisted with data analysis and interpretation using the SPSS program.

The sample was conducted at regional airports and BC Ferry terminals connecting Vancouver Island to the mainland, excluding the Departure Bay Ferry terminal, which was under construction for the duration of the survey. Surveys were also conducted at the MV Coho, MV Clipper and Harbour Air terminals.

Survey results indicate that the Vancouver Island region was the primary reason for visiting BC for almost 70% of visitors. Forty-one percent of surveyed respondents were from Vancouver Island or the Gulf Islands; 27% were from other parts of BC; 15% from other provinces; 11% from the United States and 6% were International visitors.

Excluding Vancouver Island residents, 45% percent of respondents were from other parts of British Columbia, 26% from other provinces, 19% from the United States and 10% were International visitors.

Twenty-six percent of respondents were from other provinces— the top five provinces represented were: Alberta (51.6%); Ontario (27%); with Manitoba and Saskatchewan tied at 6.3%; and Quebec at 4.7%.

Of the 19% of visitors from the United States, the top four states represented were: Washington (36.8%); 'Other' states (34.6%); California (17.6%); and Oregon (8.3%).

The top six responses of 'Other' states were: Texas (24%); Arizona (21%); Colorado (15%); New York (12%); Utah (11%); and Florida (10%) of the 34.6% responding to this category.

The top five international origins in descending order were the United Kingdom; Germany; Netherlands; Australia; and Switzerland.

Visitors age 45 to 64-years represented 46% of the visitors to the Vancouver Island Region. Of the remaining age groups, 20% were 65 and older; 15% were 35 to 44; 12% were 25 to 34; and 7% were under age 24.

Visitors reported a high level of education with 78% of respondents attaining post-secondary education. The highest percentage (32%) reported holding a University Degree with the second highest number having either College or a Technical Diploma (21%); 14% held a Masters Degree or PhD (including Medical Doctors); and 11% with some Technical; College; or University. Overall 96% of respondents were High School graduates and three-percent reported less than High School graduation.

When visitors were asked how much their group had spent on the day prior to the survey, the most frequent response was from \$101 to \$300 (29%); 16% spent \$301 to \$500; and

11% spent more than \$500. Combined, these three groups collectively (56%) spent more than \$100 the day prior to leaving the Region.

While 20% of visitors reported being in the region on business, 80% were in the region for leisure. Some people were on Vancouver Island from Powell River on the mainland for medical appointments; others from remote communities came to shop; attend school or as a stopover en-route to another location.

When visitors were asked the primary information source they used to plan their visit to the region, 35% indicated they relied on information from a previous visit; 24% had searched for information via the Internet; 22% were advised by family and friends; and nine percent of respondents had lived in the region previously. Eighty-two percent of visitors said they had spent time in the Vancouver Island region prior to their current visit.

Eighty-one percent of respondents indicated they had visited the Vancouver Island region in the past two years. Nineteen percent of respondents said this was the first time they had been to Vancouver Island or the Gulf Islands. The most frequent number of repeat visits was from '2 to 3' times for 26% of respondents; and 18% of respondents reported visiting from '4 to 7' times, respectively.

When visitors were asked how they arrived in the Region, 59% indicated they had travelled by BC Ferries; 29% had flown on a commercial airline; nine-percent had travelled on a US Ferry; two-percent arrived by float plane and a further one-percent by private vessel.

Visitors were asked if they had spent at least one hour in any of the seven Vancouver Island regions. Of the 2,637 visitors who completed the survey; 28% had spent time in the South Island; 26% had visited the Central Island; and 16% visited the North Central Region. The Gulf Islands were visited the least often.

Visitors indicated the number of days they had stayed in the Vancouver Island Region, with the most frequent response from 38% of visitors was '4 to 7 days'. The second-highest number of visitors, 25% stayed '2 or 3 days'; and 16% of visitors stayed '8 to 30 days'. About three-percent of visitors were in the Region for '31 days or longer' and five -percent visited for 'less than 24 hours'.

Primary accommodation choice was a Resort, Hotel or B & B for 42% of visitors and 37% stayed with Family or Friends, respectively. Other visitors stayed in their second home; on a private boat; or at a campground.

Respondents reported a very high level of satisfaction with their trip to the Vancouver Island Region with 98% citing they were 'very satisfied' or 'somewhat satisfied' with their experience.

When visitors were asked what they like most about the Vancouver Island Region, the highest response frequency (66%) indicated scenic beauty; with 30% selected the environment; and another 26% citing friends and family connections. The 'Other' category reported specific lifestyle factors such as clean air and the slower pace of life. Visitors also enjoy the outdoor activities available (20%); the friendly people (16%); wildlife viewing (15%); and marine activities (14%).

Almost 90% indicated it was very likely they would return. Visitors who indicated it was somewhat likely or not very likely they would return, gave the most common reasons as their advancing age and/or the distance they would need to travel in order to return to the Region. This was especially true of International visitors.

The Vancouver Island region was the single main reason for visiting BC for almost 70% of visitors, however; less than 5% indicated their visit to the Vancouver Island region was of 'little importance' to their visit to BC.

The largest number of visitors travelled either as a couple or with three adults together (43%) with another 19% of adults travelling alone. Larger groups (12%) consisted of four or more adults travelling together. Twelve-percent of respondents were families travelling with children.

Fifty-eight percent visitors indicated they will mostly likely return in the summer; 17% showed a preference for spring; and 14% chose fall—the remaining 11% stated they would most likely return in winter.

## INTRODUCTION

Vancouver Island's tourism industry requires detailed information about visitors who travel within the region to enable stakeholders to make informed marketing and customer service decisions. Tourism Vancouver Island has undertaken a significant visitor exit survey to provide the industry with this information. The study surveyed visitors to Vancouver Island and the Gulf Islands, from April to September 2008, as they were preparing to leave the Region from 13 exit points.

This information will inform Tourism Vancouver Island about who visits the Region, their place of origin, travel motivation, trip satisfaction, and trip planning process. This in turn will help the industry to better market its products to meet the needs of the travelling public.

## METHODOLOGY

Exiting visitors were randomly intercepted at 13 exit sites during a five-month period, from April 2 to September 5, 2008. Visitors were asked a series of questions as they left the Island Region. All answers were recorded electronically; no paper questionnaires were used.

Tourism industry stakeholders were asked to submit possible survey questions. The final questionnaire was adapted from an existing Tourism BC survey. The primary focus was to profile the origin and demographics of visitors to the Region. The Exit Survey Project was based at Tourism Vancouver Island's offices in Nanaimo, British Columbia.

Of the 4,473 visitors the Researchers interviewed, 2,637 completed the full survey. The survey was terminated if visitors indicated their permanent residence is in the Vancouver Island region. Forty-one percent of visitors intercepted were from the Vancouver Island region—the questionnaire was terminated at that point. Survey respondents were 57% Male and 43% Female.

Questionnaires were conducted face-to-face and data was collected using a Personal Digital Assistant (PDA). Visitors were asked about communities in all seven Vancouver Island Regions:

1. South Island
2. Central Island
3. South Central
4. Pacific Rim
5. North Central
6. North Island
7. Gulf Islands

Research assistants collected data by intercepting visitors, explaining the project and asking for participation. Overall, each questionnaire took approximately fifteen minutes to complete.

Each visitor questionnaire was coded with a number and exit point location. Data was entered into an Excel spreadsheet and then into the Statistical Package for the Social Sciences (SPSS) for analysis at Vancouver Island University in preparation for the Final Report and Power Point presentations. A Vancouver Island University research technician provided assistance with coding and analysis.

Exit Survey questionnaires were collected at 13 exit points (Ferry terminals and airports) from Port Hardy to Victoria: BCFC Swartz Bay, BCFC Duke Point, BCFC Comox, BCFC Port

Hardy, MV Coho, MV Clipper, Victoria International Airport, Nanaimo Regional Airport, Comox Regional Airport, Campbell River Regional Airport, Port Hardy Regional Airport, Harbour Air Nanaimo and Harbour Air Victoria. *(Due to construction at the Departure Bay Ferry Terminal, no surveys were conducted at that location.)*

## FINDINGS

### VISITOR CHARACTERISTICS

#### Place of Origin

Of the visitors surveyed, 41% were from Vancouver Island or the Gulf Islands; 27% were from other parts of BC; 15% from other provinces; 11% from the United States and 6% were International visitors.

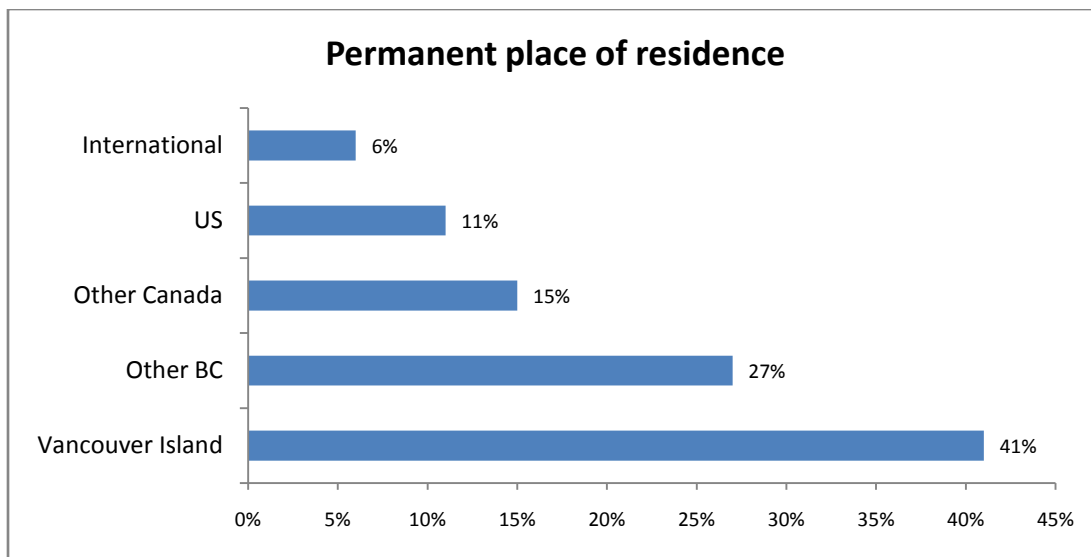


Figure 1a: Permanent Place of Residence

## Place of Residence excluding Vancouver Island

Almost 50% of respondents were from other parts of British Columbia; 26% from other provinces; 19% from the United States and 10% were International visitors.

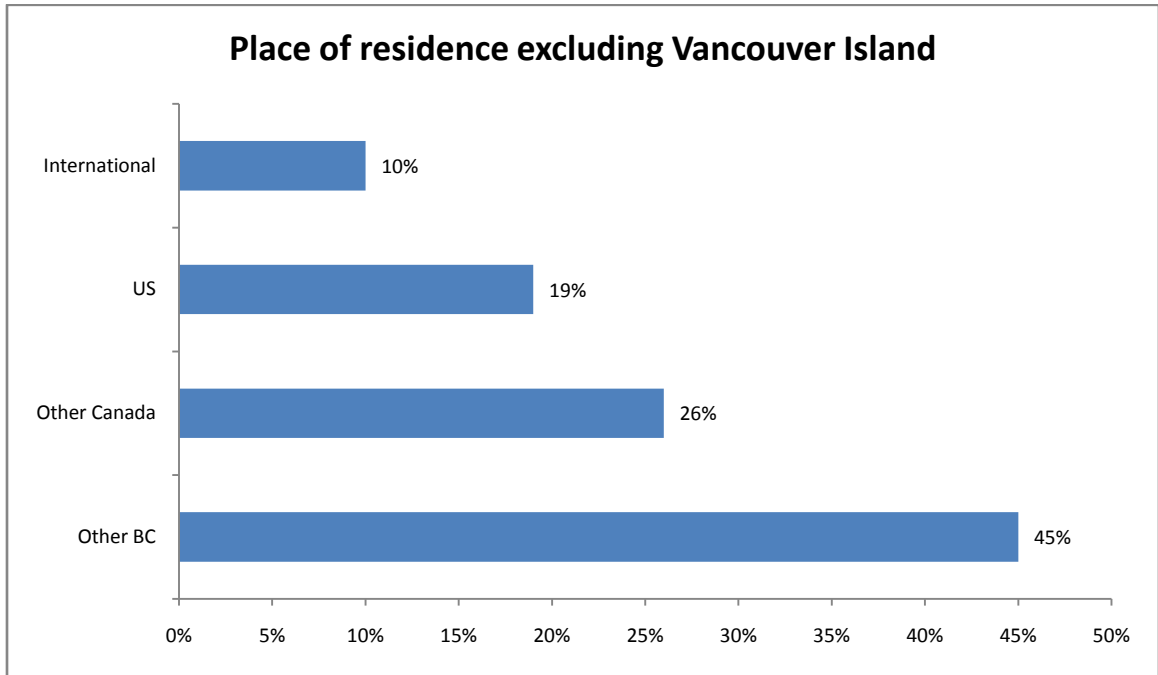


Figure 1b Place of Residence excluding Vancouver Island

## Province of Residence

Twenty-six percent of visitors from other provinces—the top five provinces represented were: Alberta (51.6%), Ontario (27%), with Manitoba and Saskatchewan tied at 6.3% and Quebec at 4.7% respectively.

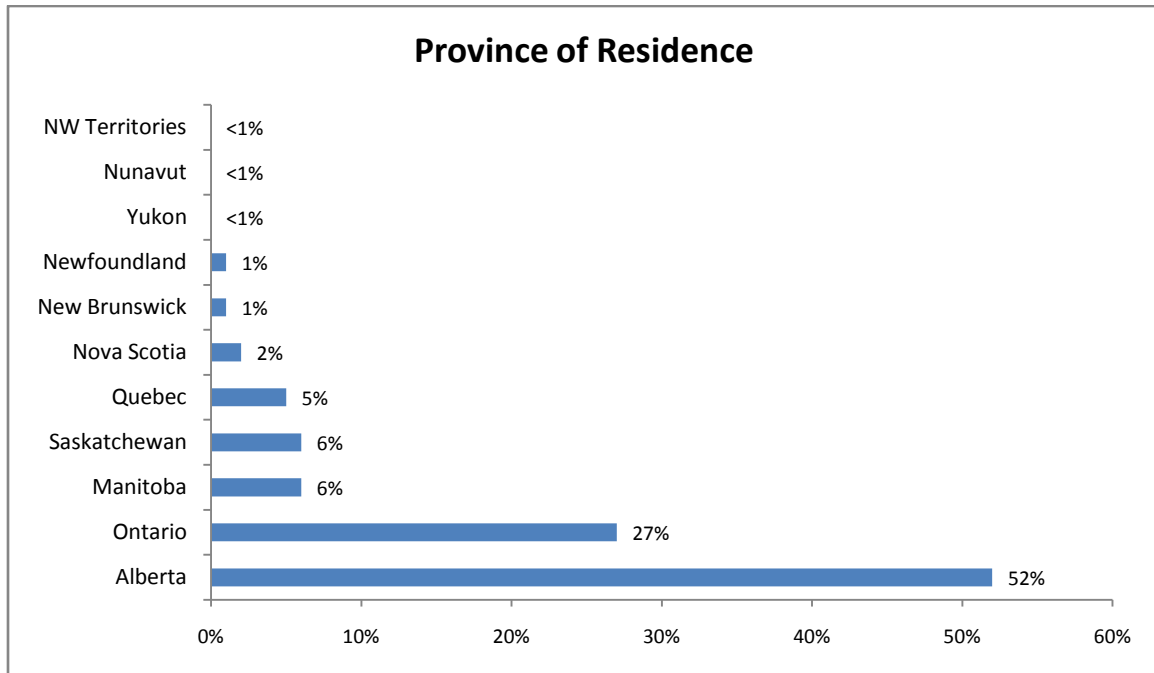


Figure 1c Residence by Province.

## US State of Residence

Almost 20% of visitors were from the United States—the top four States represented were: Washington (36.8%), 'Other' states (34.6%), California (17.6%) and Oregon (8.3%).

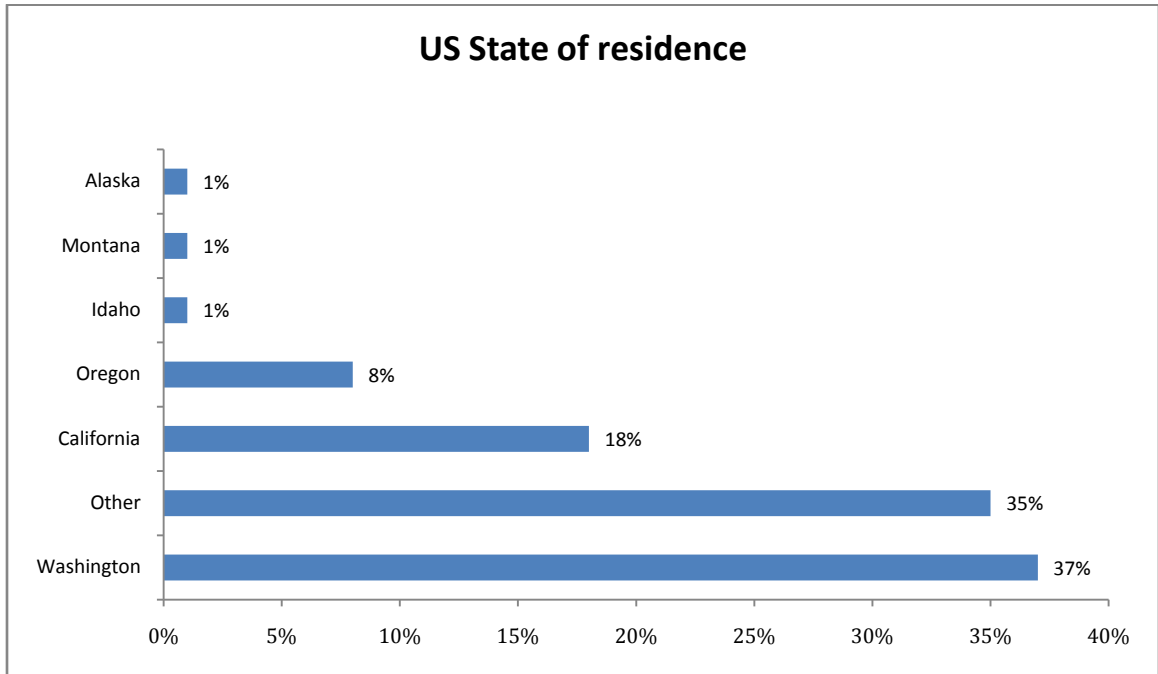


Figure 1d. US State by residence

## US State of residence: 'Other'

Almost 35% of visitors from the United States selected their residence as an 'Other' State. The top six responses were from: Texas (24%), Arizona (21%), Colorado (15%), New York (12%), Utah (11%) and Florida (10%).

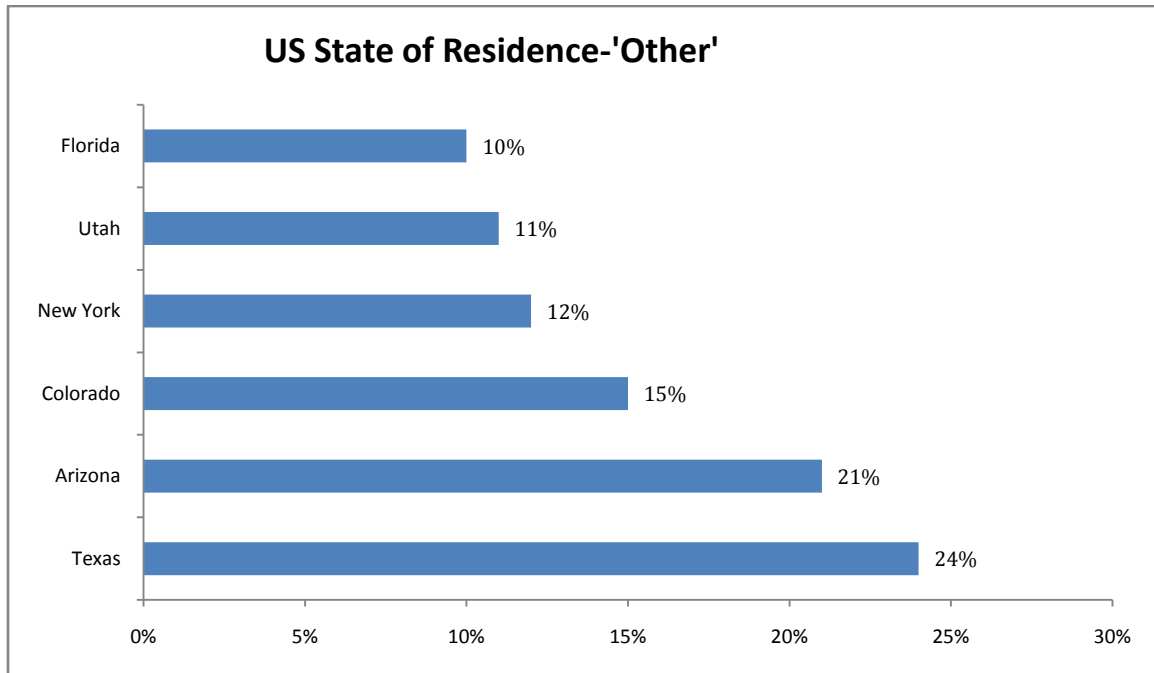


Figure 1e. US State by residence - 'Other'

## International Visitor Origin

Ten-percent of respondents were International visitors; the top five nations represented were: United Kingdom (39%); Germany (24%); Netherlands (18%); Australia (11%); and Switzerland (8%).<sup>1</sup>

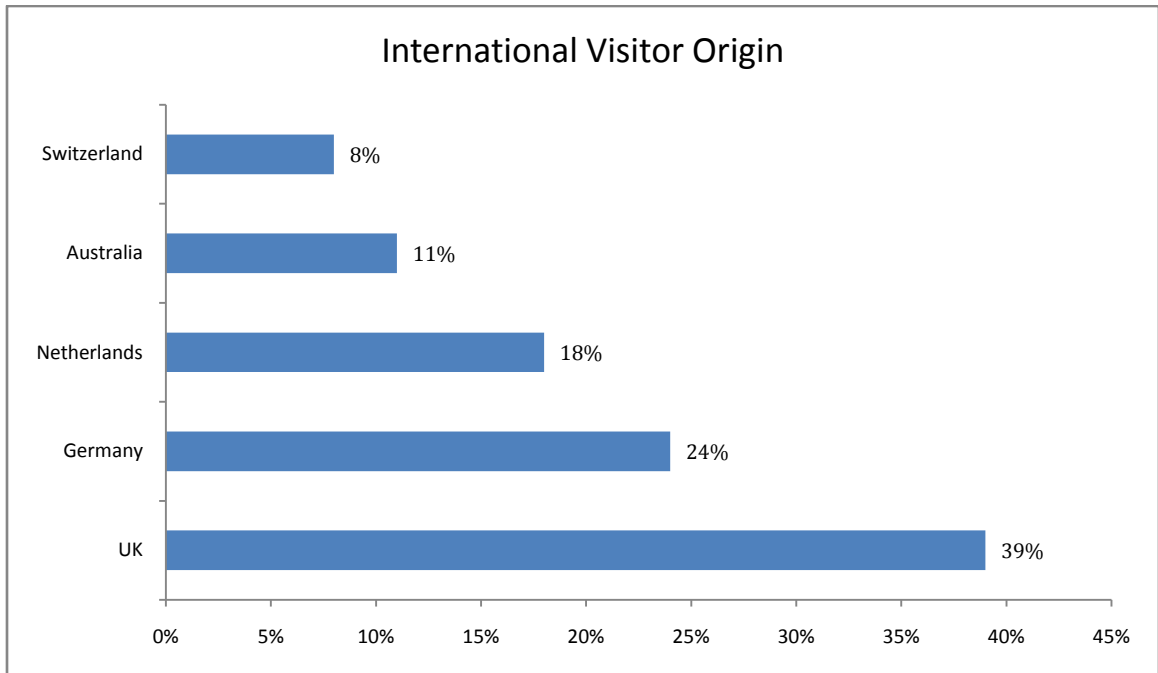


Figure 1f. International Visitor Origin

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<sup>1</sup> This data should be used with caution as non-English speakers were effectively excluded from the survey.

## Visitor Age Ranges

Those visitors reporting 45 to 64 represented 46% of the visitors to the Vancouver Island Region. Of the remaining age groups, 20% were 65 and older; 15% were 35 to 44; 12% were 25 to 34 and 7% were under age 24.

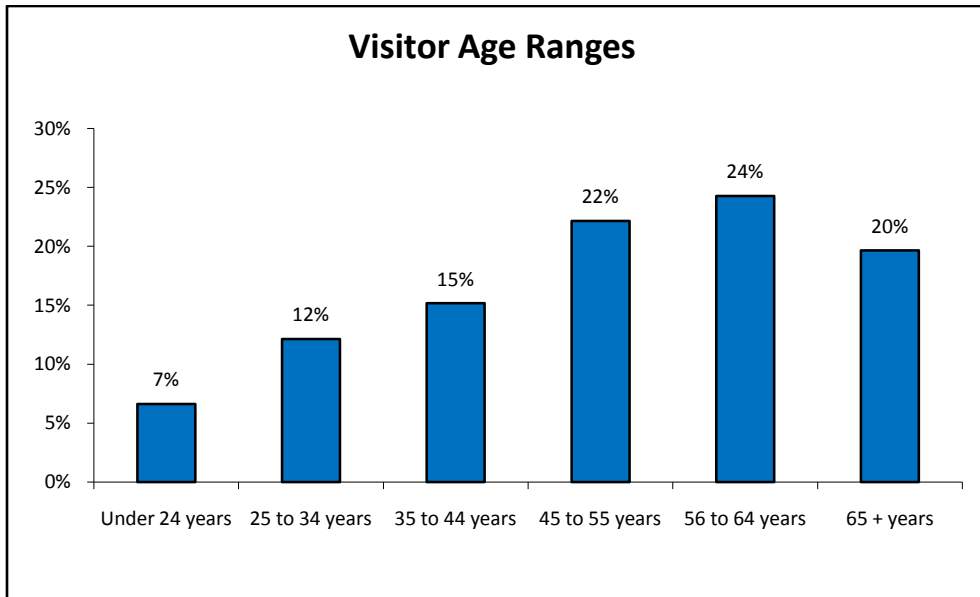


Figure 2. Visitor Age Ranges

## Education Levels

Visitors to the Vancouver Island Region reported a high level of education with 78% having post-secondary education. The highest percentage (32%) reported having a University Degree with the second highest number having either College or a Technical Diploma (21%) with 14% having a Masters Degree or PhD (this number includes Medical Doctors) and 11% with some Technical, College or University. Another 18% were High School graduates with less than 3% reporting having less than High School graduation.

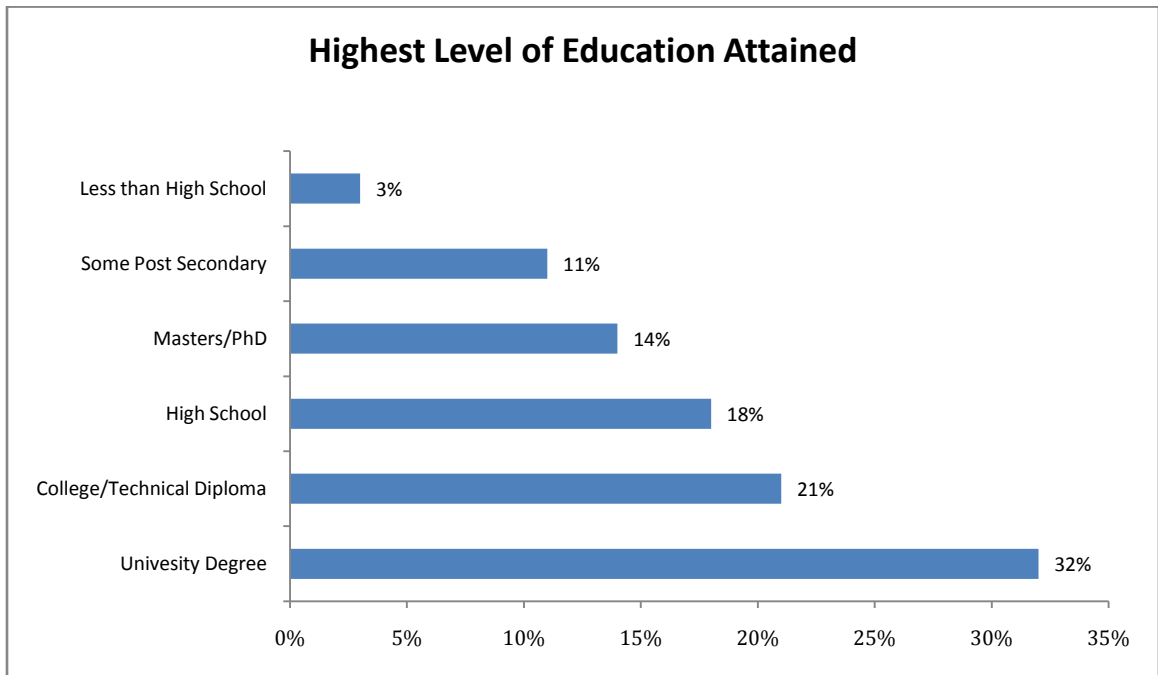


Figure 3. Highest Level of Education attained

## Expenditures

Visitors were asked how much their group had spent on the day prior to the survey, including accommodation. The most frequent response was from \$101 to \$300 (29%) with 16% spending \$301 to \$500 and 11% spending more than \$500. Combined, these three groups collectively (56%) spent more than \$100 the day prior to leaving the Region.

While 33% of visitors spent \$100 or less, with 17% reporting expenditures of \$51 to \$100 and 16% spending \$1 to \$50, 12% reported spending nothing at all.

However, it should be noted that most of the 12% who reported spending nothing the day before; either stayed with friends or family; or in their own second home; had friends or family treating them or had pre-paid their expenses.

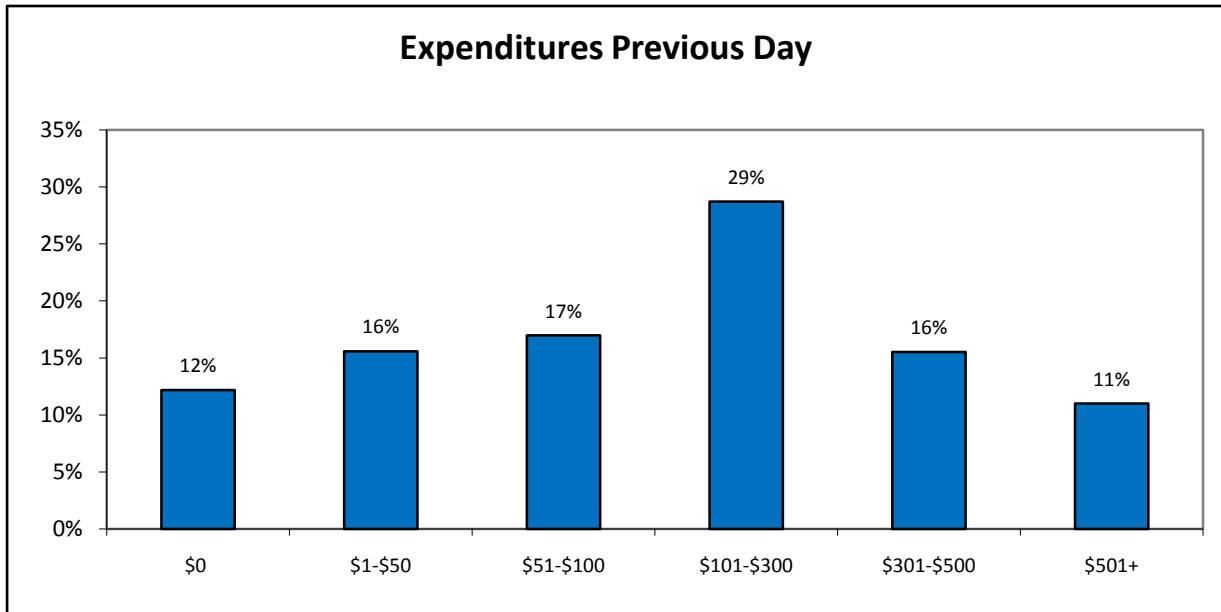


Figure 4. Visitor Expenditures from the previous day.

## Travel Party Size

The largest number of visitors was travelling either as a couple or with three adults together (50%) Another 22% adults were travelling alone. Larger groups (14%) consisted of four or more adults travelling together; the same proportion of families with children.

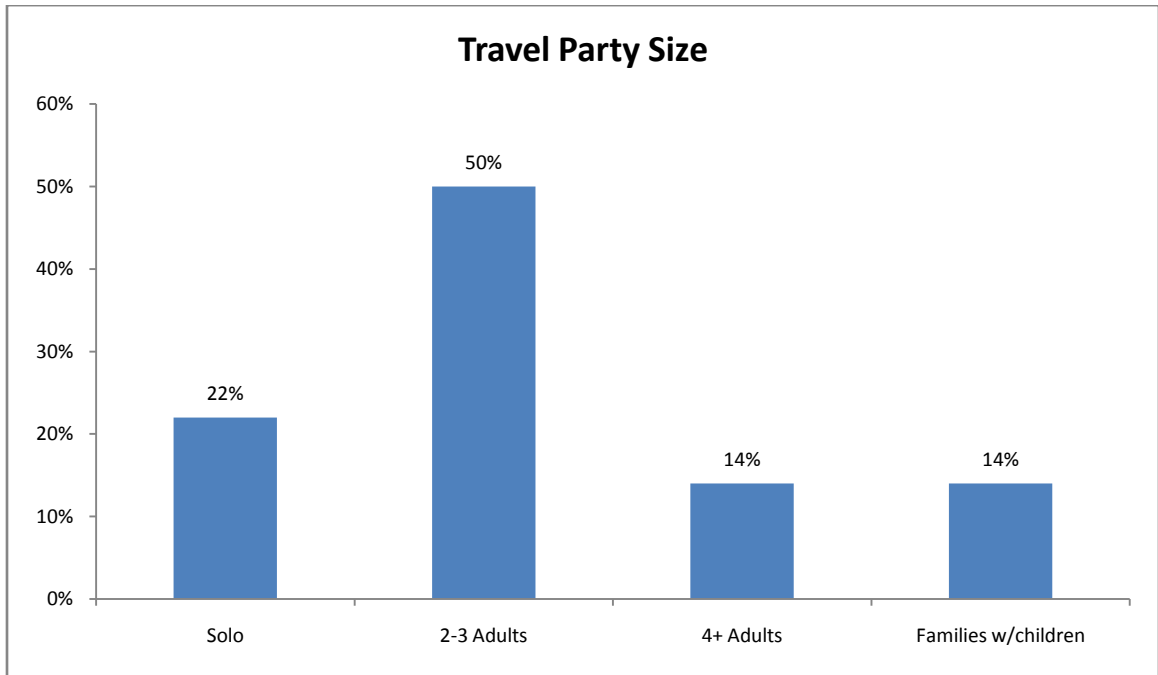


Figure 5. Travel Party Size

## Trip Planning

Visitors were asked if the primary purpose of their visit was business or leisure.

Eighty-percent stated they were in the Region for leisure; 20% of visitors reported were in the region for business purposes.

Visitors were also asked their primary motivation for visiting the Vancouver Island Region. While 32% identified friends and family as their primary motivation, 28% identified the scenic beauty of the region as the reason for their visit. Within the 'Other' category (24%) are a significant number of visitors who indicated that it was a lifestyle factor; primarily rest and relaxation and accessing the outdoors their primary trip motivator(s). Anecdotally, some visitors also indicated they were staying in their second home or were conducting research because they are considering relocating to the region.

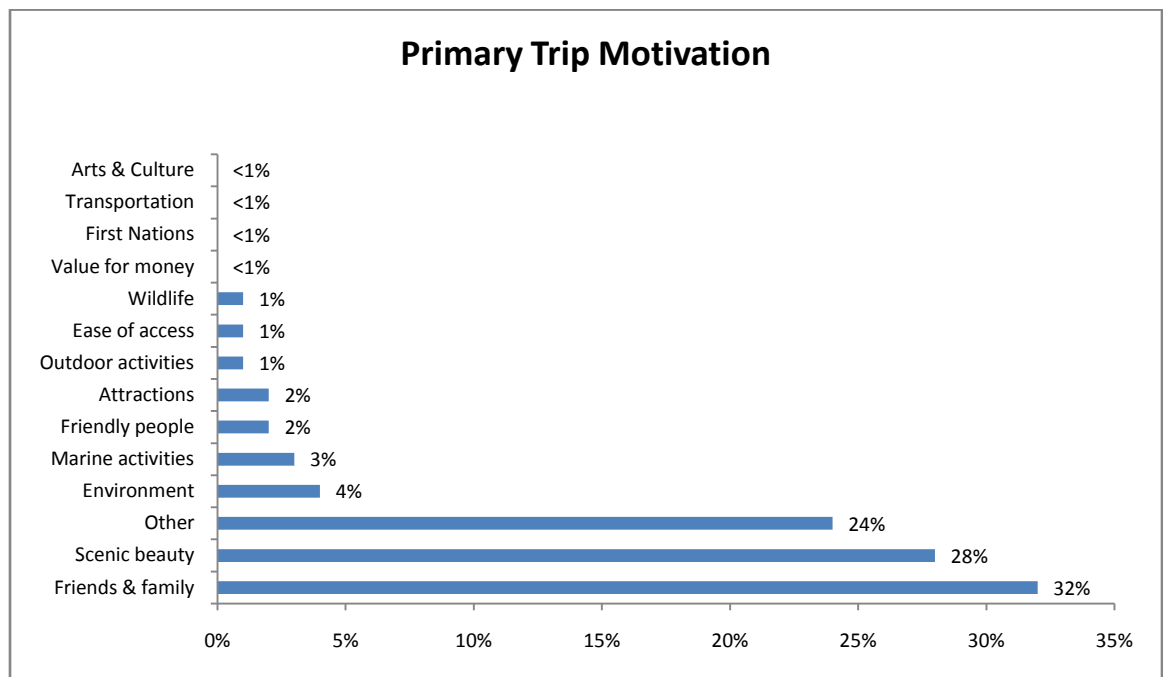


Figure 6 Primary trip motivation

## Primary Trip Planning Information Source

When visitors were asked the primary information source they used to plan their visit to the Region, 35% indicated their information source was a previous visit; 24% had searched for information via the Internet; 22% were advised by family and friends—9% of visitors had lived in the region previously. Almost 100% of respondents found their primary trip planning information sources useful.

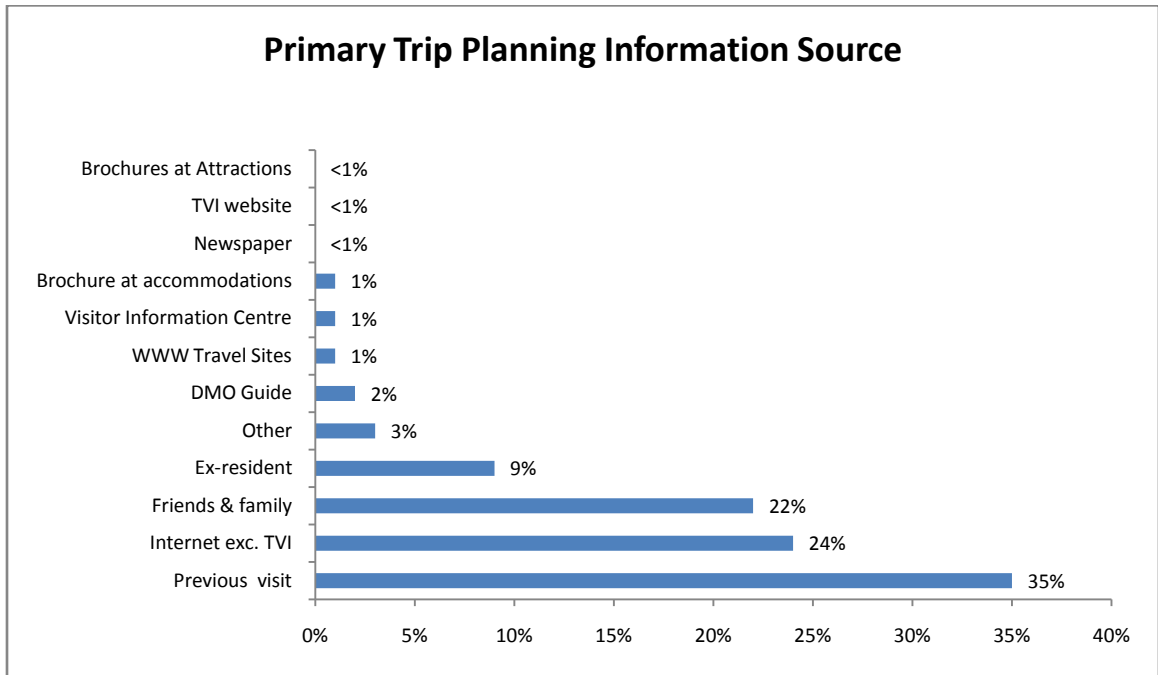


Figure 7. Primary source of trip planning information

## Frequency of Visits

A significant proportion of visitors (82%) had visited the region previously. Eighty-percent of respondents indicated they had visited the Region in the past two years, excluding their current trip. Nineteen-percent of visitors stated said this was the first visit to the region. The highest frequency of repeat visits was two to three occasions at 26% and 18% of visitors had visited the region between four and seven times, respectively.

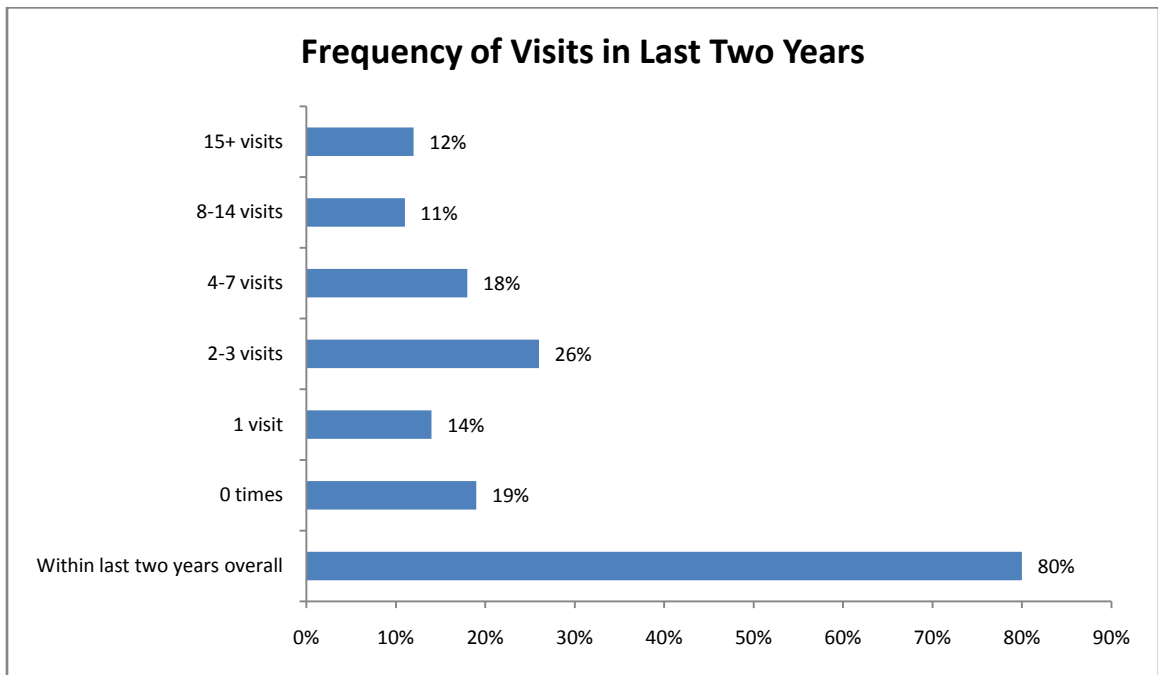


Figure 8. Frequency of visits to the region not including current trip

## CHARACTERISTICS OF THE TRAVEL EXPERIENCE

### Travel Modes: Arrivals

Visitors were asked if the primary purpose of their visit was business or leisure; 80% were visiting primarily for leisure and the remaining 20% in the region for business purposes. Eighty-one percent of the business travellers interviewed had previously visited for either business (58.3%) or leisure (22.8%). Of the business travelers, almost half (49%) had participated in a leisure activity while in the region on business.

When visitors were asked how they arrived in the region, 59% indicated they had travelled on BC Ferries; 29% had flown on a commercial airline; 9% had travelled on a US Ferry; 2% used a float plane with 1% arriving by private vessel.<sup>2</sup> Note: Researchers spent more time conducting surveys at BC Ferries and international/regional airports with proportionately less time at US Ferries and Harbour Air.

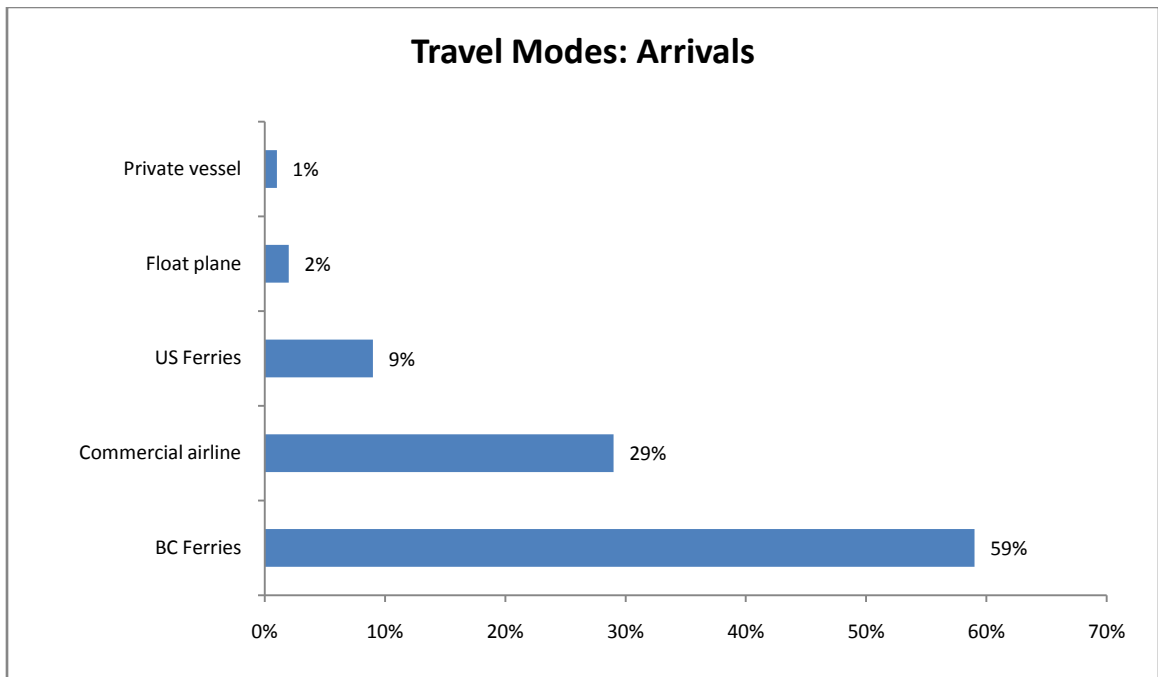


Figure 9. Travel mode by arriving visitors

<sup>2</sup> Note: Researchers spent proportionately more time collecting questionnaires at BC Ferries and international/regional airports with proportionately less time at US Ferries and Harbour Air based on relative sample size.

## Arrivals Methods

The arrival method was compared with the Exit location of the interview—data indicates that visitors did not always arrive and leave via the same method of transportation.

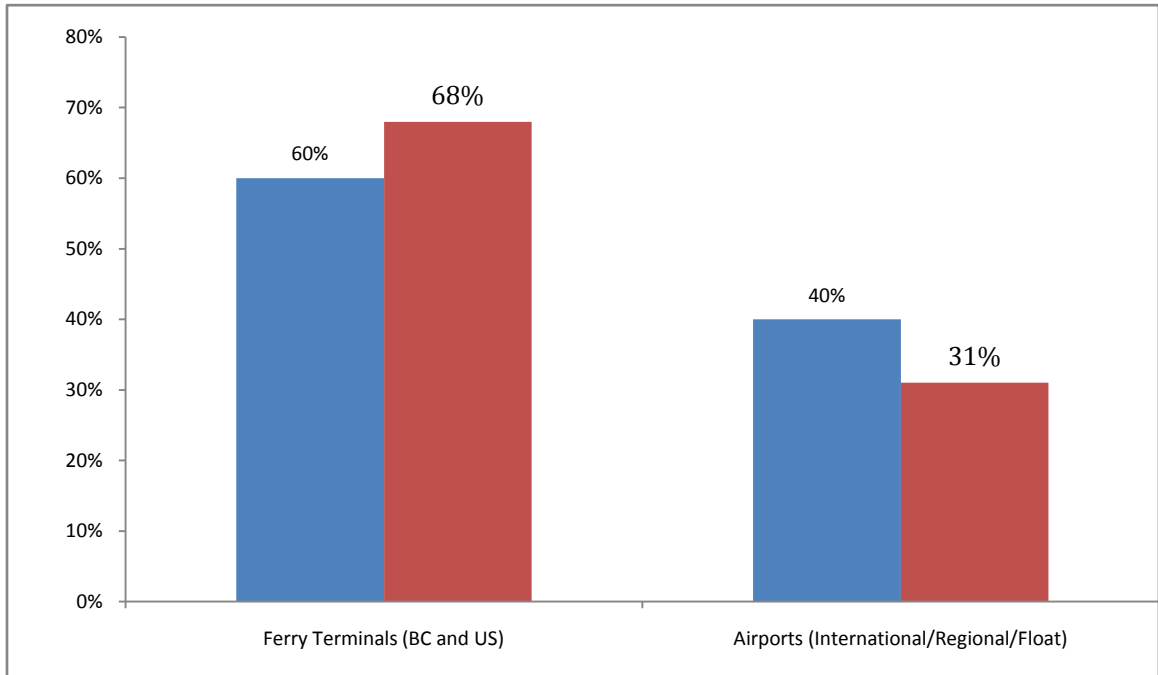


Figure 10. Comparison of arrival and exit modes n=2034

## Transportation Modes

Private vehicles were the most popular mode of transportation used by surveyed visitors in the Region. Although rental vehicles, including RV's, were observed, they were not recorded as a separate category. The 'Other' category refers primarily to visitors who chose to walk; use a private vessel; or take a taxi.

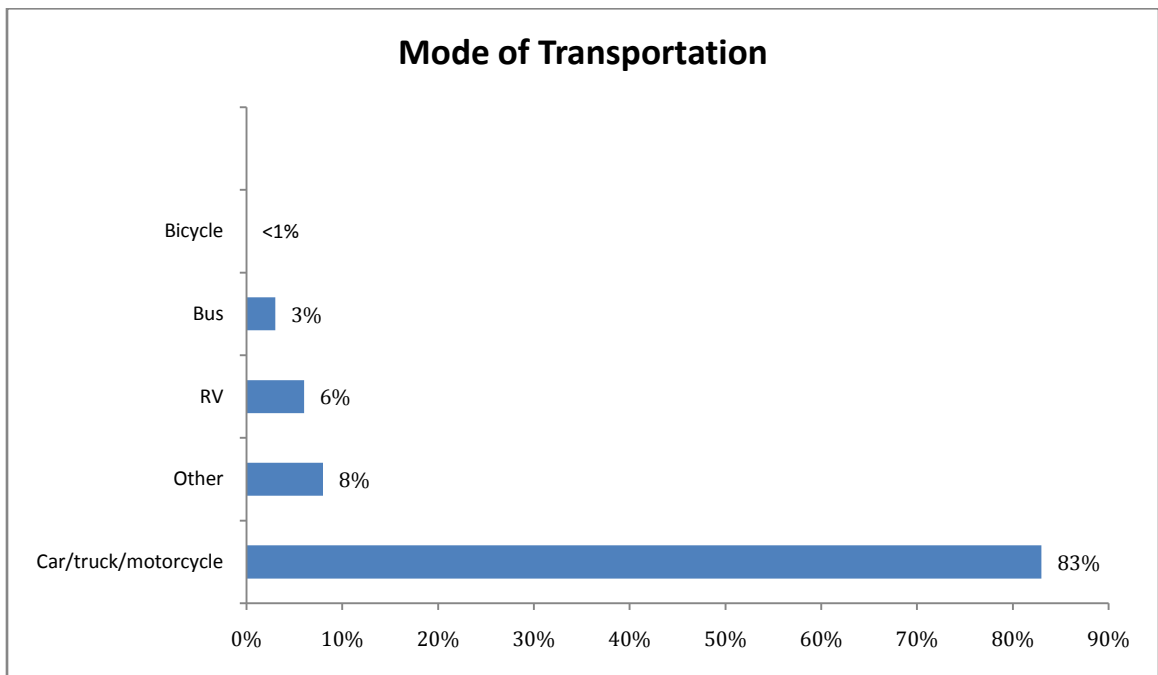


Figure 11. Visitor transport modes during visit

## Time spent in region

Visitors were asked were asked to select were they had spent at least one hour in one or more of the seven Vancouver Island Regions. Almost one-third of visitors had spent time in the South Island; 26% had visited the Central Island and 16% had visited the North Central Region. The Gulf Islands were visited the least often. Visitors were shown a map outlining the Vancouver Island sub-regions to help ensure accuracy of response.

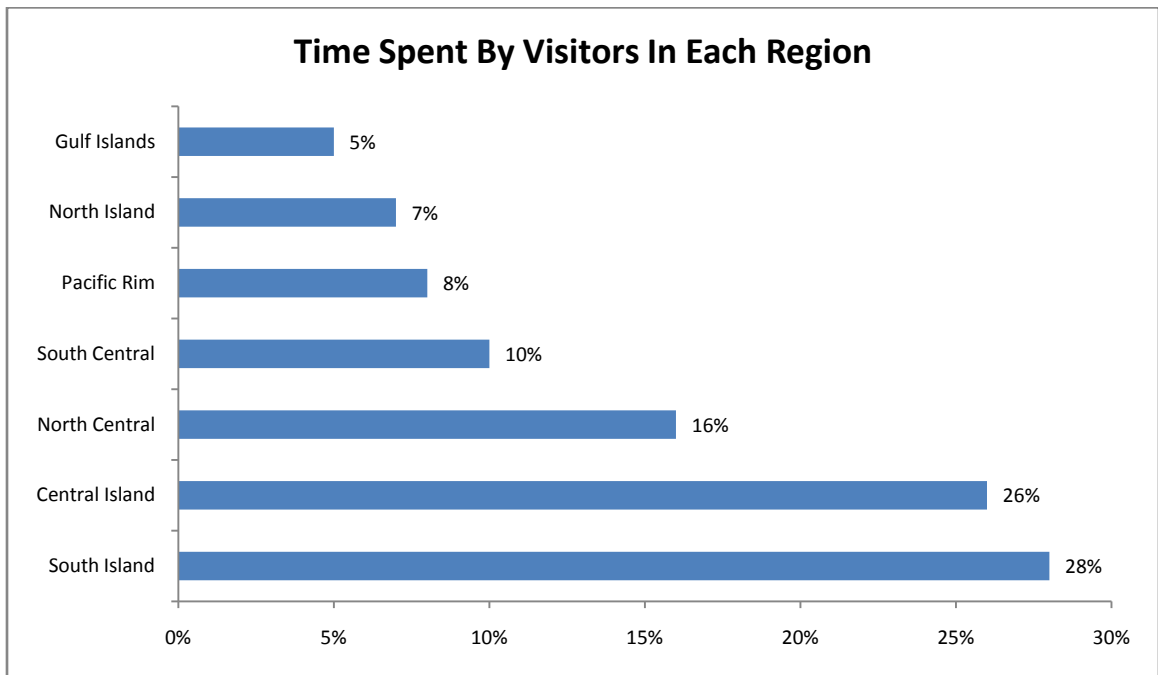


Figure 12. Time spent by visitors in each region—more than one hour in any region

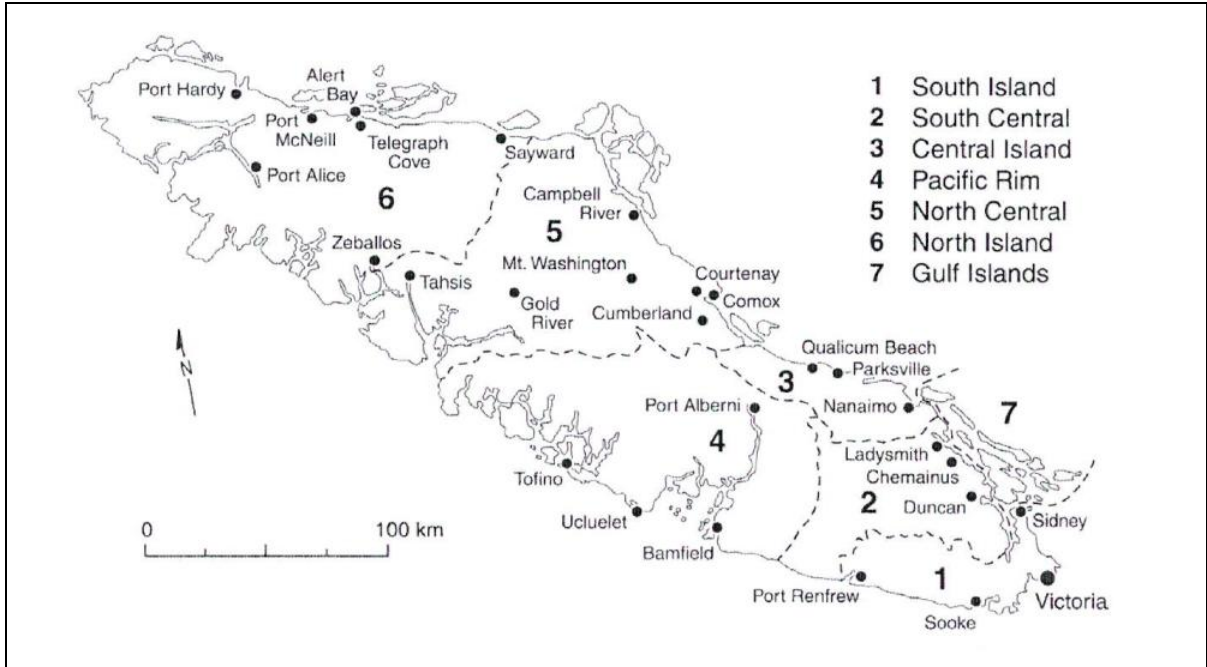


Figure 13. Map identifying regions

## Duration of Stay

Visitors were asked the number of days they had stayed in the Vancouver Island Region during their current visit. The most frequent response from 38% of visitors was 4 to 7 days; second-highest was 25% of visitors staying 2 or 3 days and 16% of visitors staying 8 to 30 days. Another 3% of visitors were in the Region for 31 days or longer; about five-percent of respondents visited for less than 24 hours.

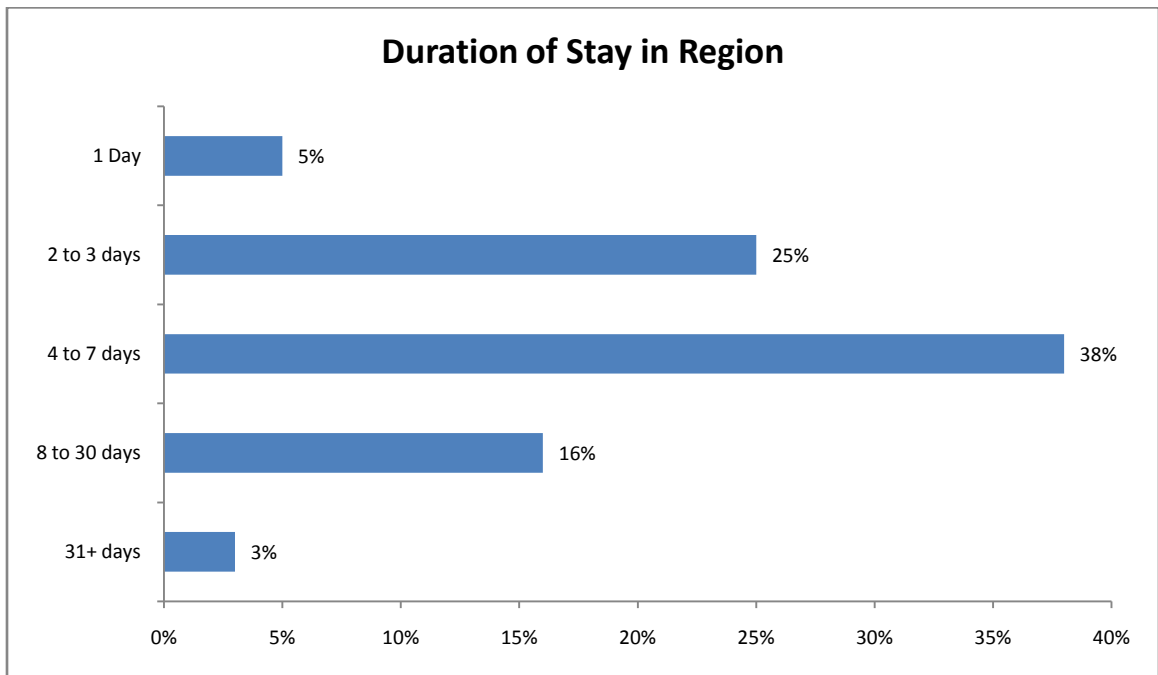


Figure 14. Duration of stay in the Vancouver Island Region

## Primary Trip Activity

Visitors were asked to describe their single primary activity while on their trip to the region. The responses were recorded as open-ended text and then coded into approximately twenty categories. It is highly likely that respondents participated in more than one activity on their trip; however, analyzing data recording multiple trip activities is problematic because of the high sample number. The data indicates that dining and entertainment (including spas), sightseeing, walking, visiting and shopping are the five most popular activities reported by respondents.<sup>3</sup>

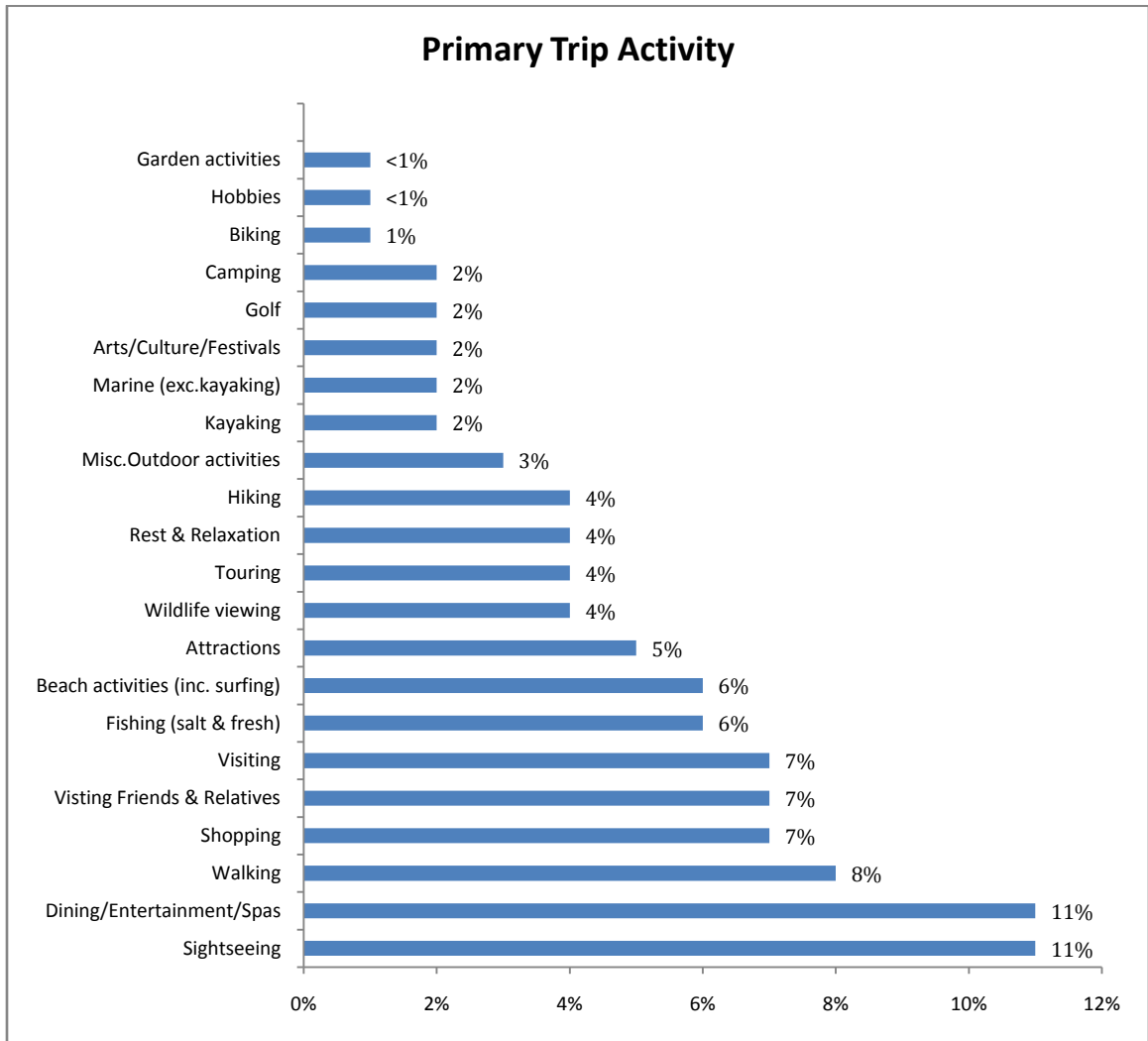


Figure 15. Most Popular activity while in region

<sup>3</sup> Visitors could select more than one activity.

## Primary Visitor Accommodation

Visitors were asked their primary accommodation during their stay in the Vancouver Island Region. Although some people had stayed in more than one form of accommodation, only their primary choices were recorded.

The most popular choice was in a Resort, Hotel, Motel or B & B at 42%; while staying in the home of friends or family accounting for 37% of respondents. The 'Other' choices (11%) were primarily second homes; private vessels or youth hostels. Campgrounds and RVs accounted for almost 9% of accommodation with the remainder surveyed were day trippers.

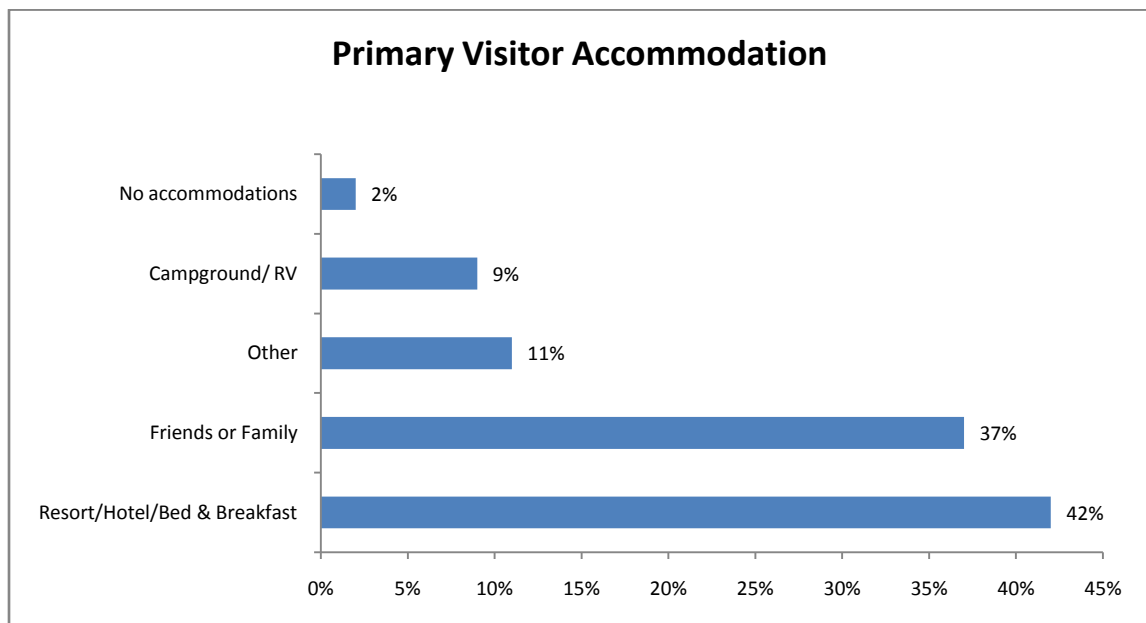


Figure 16. Primary Visitor Accommodation

## EVALUATION OF THE TRAVEL EXPERIENCE

### Trip Satisfaction

Visitors reported a very high level of satisfaction with 98% of respondents citing they were somewhat satisfied or very satisfied.

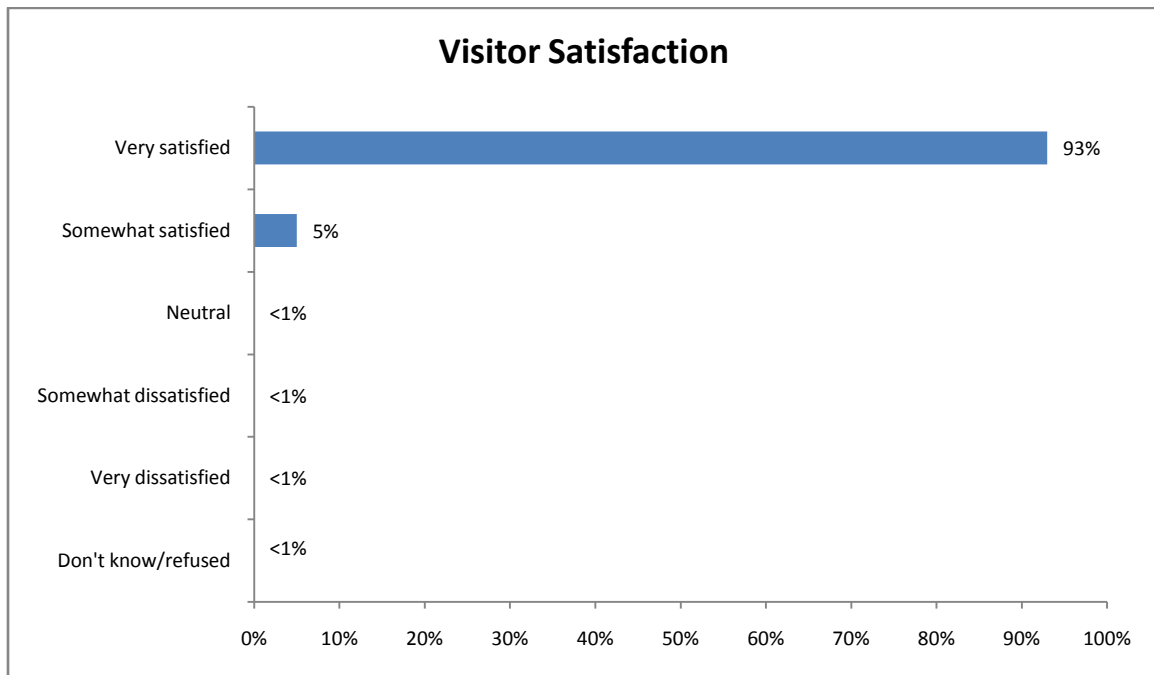


Figure 17 Visitor satisfaction levels

## The Visitor Experience

When visitors were asked what they like most about the Vancouver Island region, the greatest number, 66%, indicated it is the scenic beauty with 30% selecting the environment and another 26% citing friends and family connections. The 'Other' category mentions included specific lifestyle factors such as clean air and a slower pace of life. Visitors also enjoy the outdoor activities available (20%); the friendly people (16%); wildlife (15%) and marine activities (14%).<sup>4</sup>

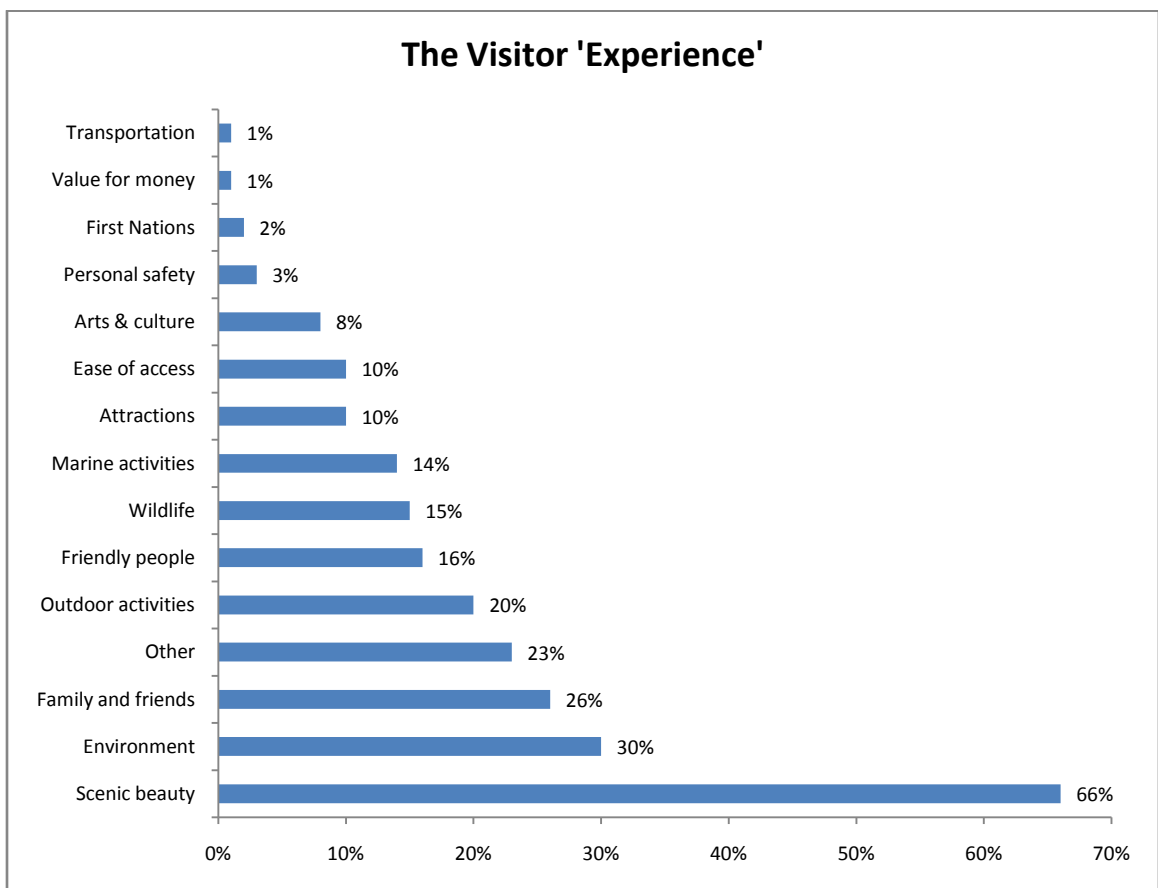


Figure 18. The Visitor Experience

<sup>4</sup> Respondents were given the option to select more than one category.

## Likelihood of Returning to Region

Almost 90% indicated it was 'Very likely' they would return. Of the visitors who indicated it was 'Somewhat likely' or 'Not very likely' they would return, the most common reasons given were the advancing age of the visitors or the distance they would need to travel in order to get back to the region. This was especially true of International visitors.

Summer is the season 58% of visitors indicated they will mostly likely return. Another 17% showed a preference for Spring and 14% chose Fall.

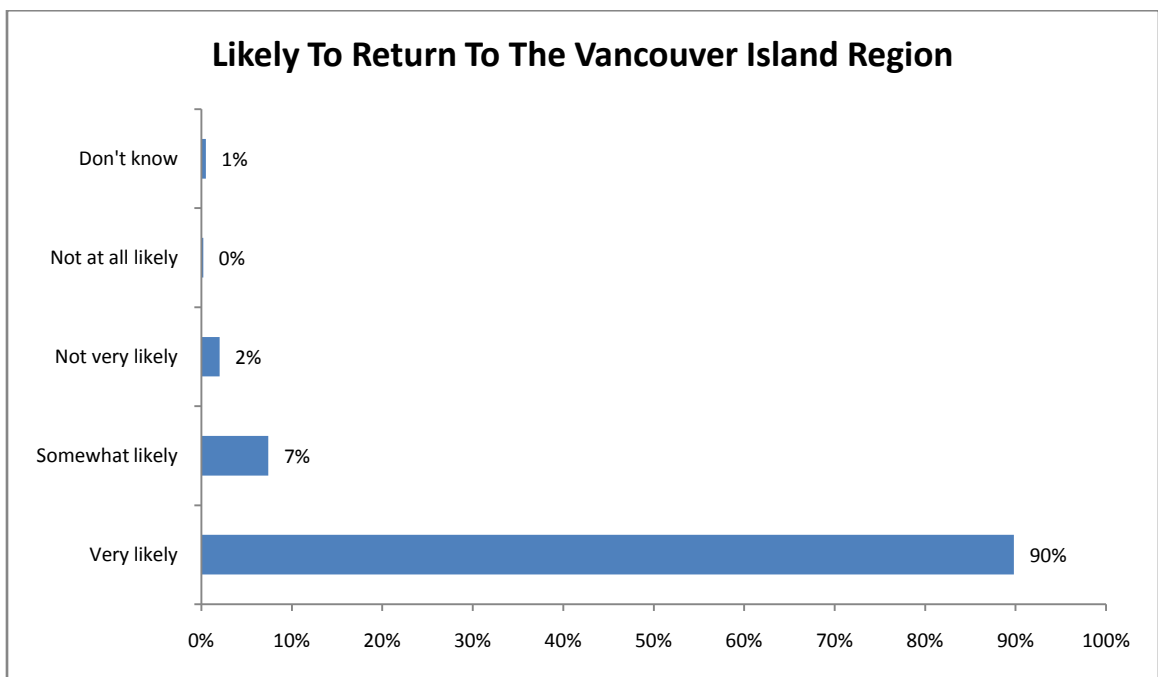


Figure 19. Visitor's likelihood of returning to region.

## Importance of Vancouver Island to Visit the British Columbia Region

Survey data indicate that the Vancouver Island Region was the primary reason for visiting BC for almost 70% of visitors; less than 5% indicated that their visit to the Vancouver Island Region was of little importance to their visit to BC.

Visitors were asked to rate on a scale of 0 to 10, how important Vancouver Island or the Gulf Islands was in their decision to visit British Columbia. Zero indicated no influence at all and 10 indicated that Vancouver Island and the Gulf Islands was the single main reason for visiting British Columbia.

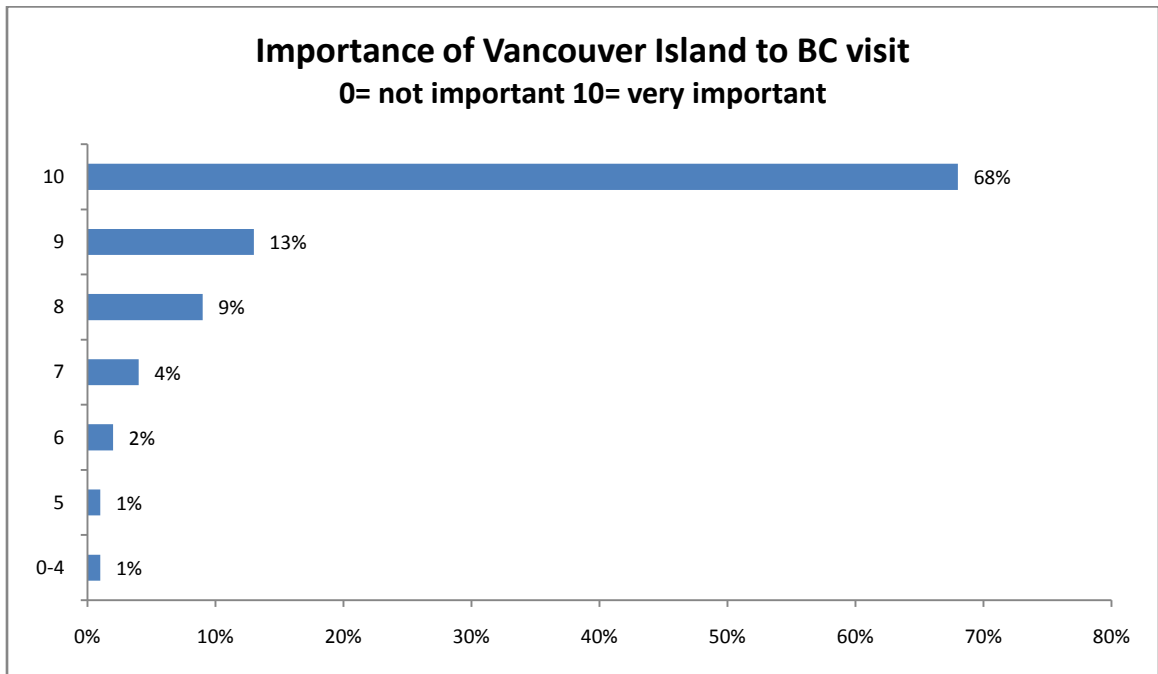


Figure 20. Importance of Vancouver Island to visit.

## SUMMARY OF VISITOR COMMENTS

Finally, visitors were asked if they had any comments they would like to share—most of the visitors who completed the survey recorded comments. There are more than one thousand comments from which several themes emerged—the top four were:

- Scenic Beauty
- Friendly People
- Quality of life
- Transportation

Respondents also shared specific suggestions and provided input regarding their experience in the region.

### THEMES

Many comments about the Region's *scenic beauty* are positive. Quotes include: "Beautiful spot you have here." "You're bounded by the sea on one side and by envy on the other." "Enjoyed living in pristine wilderness while here." "It's a very beautiful Island you've got – the trees, the ocean and the mountains – what more could you ask?" "Most beautiful place I've ever seen – even the air is great." "It's God's county here." "It's gorgeous here! I don't know how anyone could walk away from a place like this and not be in awe."

Many others commented on the *friendly people* they encountered. Quotes include: "Appreciate the hospitality." "Very loving and friendly people." "People are just great here." "Friendly people. We felt welcome here." "People are very friendly and helpful." "Met some lovely people." "Super-friendly people." "The level of service is superb." "Everyone is very friendly."

Other comments revolved around the *quality of life* in the Region. Quotes include: "Great air quality." "Enjoy Island life." "Don't tell everyone because everyone will move here." "Very laid-back." "Nice place to come and relax." A 91 year-old said: "I've always liked coming here because it's peaceful." Others said: "Very relaxing trip. Most relaxed I've been in a year." "Like it so much I'm moving here."

The highest praise received is summed up in the following quote: "We all came here for a family reunion from different parts of the USA. When my brother was diagnosed with stomach cancer and given six months to live, he said his #1 place to visit before he died was Victoria – and that is why we are here. Our visit couldn't have been any better!!!"

Many people indicated they already have a second home in the Vancouver Island Region while others indicated they plan to relocate to the Region.

A significant number of visitors expressed concern at the perceived high cost of *transportation* to the region and stated that transportation costs could be a barrier to more frequent and/or future visits.

#### *VISITOR COMMENTS*

- MV Coho needs a store or kiosk on site. We'd like to shop after checking in.
- Let people swipe their own credit cards at BCF terminals to speed lines up.
- Make a trail map of the Galloping Goose available.
- Utilize a better recycling system on the Island.
- Install a longer runway at Port Hardy as we can't land if it is raining.
- A small fridge in your room would be a nice service.
- WestJet is wonderful but needs some bigger seats for bigger people.
- Need more Spas that locals can afford. Locals are tourists too.
- Not enough campgrounds on the Islands.
- Put VICs in Airports and on BC Ferries.
- Campsites need more showers and flush toilets.
- Hard to read signs, especially street signs. Make them more visible with florescent paint and larger print.
- Add mileage to signs indicating distance to venues.
- Provide a bus connection from Duke Point Ferry terminal.
- Would like to see more of a First Nations presence.
- Hard to figure out how to get to Vancouver Island from Seattle, when on the BC Tourism website. Provide more specific information and include distances.
- City tour buses need to run later. They stop at 5:00 p.m.
- Hotels need to band together and offer 3 nights for the price of 2.
- Offer more free events for children.
- Offer 1 free ferry ride after 4 full fares have been paid.
- Offer deals for specific groups – i.e. – fishermen – could pay for their fishing license if they stay at your hotel/motel/B&B.
- Offer qualified staff to babysit children so parents can go out.
- Use fish licenses for wild salmon enhancement.
- Provide tour packages to Gulf Islands and up and down Vancouver Island.
- Offer "bareboat" power and sailboats for rent.
- Provide more information about attractions and accessibility for people with disabilities. (May be increasingly important due to aging population.)
- Promote motorcycle (and bicycle routes) and you'll have lots more visitors. See what they do in Oregon. Have Diners, Ice Cream and Hot Chocolate stands en route and place their location on a map.
- Put ATMs on ferries. Put ATM locations in brochures.
- Run flights for tourists in old war planes – like they do in Florida – very popular with tourists.
- Tourism VIC hours are too short. Provide more information on local attractions and activities at VICs.

- Sell BC road maps over the Internet so tourists can pre-plan visit.
- Would have liked to have rented kayaks on Comox Lake – good business for someone to start.
- Provide a magazine that caters to mid-age (Baby Boomer) tourists.
- Allow tourists to use a credit card at South Terminal at YVR.
- Provide more information on Island lakes and rivers. It would be good for fly-fishing. Add that information to VICs and websites. Have a more detailed map of Vancouver Island and include more contact numbers.
- BC Museum only covers the Coastal Region. What about the rest of BC? Very poor coverage of the rest of BC.
- The last experience an airline passenger has is with Airport Security – and that can leave a very bad impression with tourists.
- Beautiful here. Nice to see no bums on the street like there are in Calgary.
- We were approached by too many beggars. We don't have them in the USA like this.
- Campgrounds are difficult to find.
- Canadian government should negotiate with the European Union to allow tourists to import privately caught fish.
- The age barrier in pubs means you are losing money from families travelling with children.
- Several people expressed concern that the Coho would be relocating to Sidney. Tourists indicated they would not return to Victoria if that were the case.
- Cut the trees at lookouts. It's hard to see the view.
- Put Casinos on BC Ferries to help pay for them.
- American tourist said: In Washington State, all the ferries are free.
- Figure out the cost of the trees and let us buy them to save them.
- Surprised at "forced tipping."
- How about a deal for people who like Canadians?
- Campbell River Airport is too overzealous with security. We won't be back to that airport again.
- Hide the sales tax when we're shopping.
- Didn't realize the Clipper was 'passenger only.'
- Friendly people everywhere except in Tofino where everyone was miserable. Port Hardy also received poor reviews on 'friendly people.'
- Promote Canada Day to American tourists and suggest they wear red and white on July 1<sup>st</sup>.
- Re-open the tunnel to Newcastle Island as a tourist attraction.

## SUMMARY

Almost 70% of respondents surveyed stated that the Vancouver Island region was their primary reason for visiting British Columbia, indicating a very high level of consumer acceptance of the Vancouver Island region as a desirable destination. Excluding Vancouver Island residents, almost half of regional visitors were from other parts of British Columbia and almost a third were from other Canadian provinces. The balance of visitors constituted those from the United States and International markets at roughly a fifth were US and a tenth were International visitors overall.

Of the 26% of respondents who were from other provinces, Alberta accounted for slightly more than half and almost 30% were from Ontario.

Washington and California visitors accounted for more than 50% of US visitors and a third were from 'Other' states, primarily Texas and Colorado. In terms of the regions' close-in markets, Oregon represented slightly less than ten-percent of respondents.

The top five international origins in descending order were the United Kingdom; Germany; Netherlands; Australia; and Switzerland. Caution should be used with this data as non-English speakers were essentially excluded from the survey.

Almost 70% of respondents can be classified as baby boomers or seniors; almost 20% were aged under 35 and the balance 15% were between 35 and 44 years old.

Visitors reported a high level of education with almost 80% of respondents attaining post-secondary education—almost 50% of respondents held a degree and a further 20% held a College or Technical diploma.

Overall, half had spent between \$100-500 on the day before they exited the region and about ten-percent had spent more than \$500. This data may not reflect average daily expenditures as visitors may have spent disproportionately more on the penultimate day of their vacation settling their accounts with accommodation providers; vehicle rentals; etc and/or spent on souvenirs.<sup>5</sup> A high percentage of visitors—80%—were in the region for leisure.

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<sup>5</sup> 'Previous day' expenditure data was collected as this amount would most likely be fresh in the visitors mind compared to visitors' recollections of expenditures for their entire trip.

Almost 90% of respondents cited the internet; previous visit experience; advice of friends and relatives; and/or were ex-residents as their primary sources of information. A small percentage cited using Destination Marketing Organization collateral material or stakeholder brochures as their *primary* information sources. Further research needs to be conducted on this topic as it is unclear how visitors use or used any or all of the available resources in combination, or, as their single exclusive source.

A high percentage of visitors had visited the region in the last two year and a further almost 20% indicating they had not visited prior to being surveyed. Eighty-one percent of respondents indicated they had visited the Vancouver Island region in the past two years. Further, more than 40% of respondents had previously visited the region between two and seven times overall, indicating a high level of return visitation.

When visitors were asked how they arrived in the Region, almost two-thirds indicated they had travelled by BC Ferries; a third had flown on a commercial airline; almost a tenth had travelled on a US Ferry; two-percent arrived by float plane and a further one-percent by private vessel. The data reflects the high reliance the regional tourism industry has on the BC Ferry Corporation and commercial airlines for economic health and stability.

Visitors were asked if they had spent at least one hour in any of the seven Vancouver Island regions. Of the 2,637 visitors who completed the survey; 28% had spent time in the South Island; 26% had visited the Central Island; and 16% visited the North Central Region. The Gulf Islands were visited the least often.

In general, visitors a majority of visitors—63%--indicated they had stayed in the Vancouver Island region for short-getaway or medium length stays—less than a week. Almost 20% stayed for a week or longer and a small percentage had stayed for longer than one month. About five-percent of visitors had visited for a day or less.

Conventional accommodation options accounted for more than forty percent of visitors' choices and almost forty percent stayed with family and friends, accounting for the majority of respondents. Visitors also stayed in second homes; private vessels and campgrounds.

Respondents reported a very high level of satisfaction with their trip to the Vancouver Island Region with 98% citing they were 'very satisfied' or 'somewhat satisfied' with their experience.

The Vancouver Island region appears to have the most appeal to adult couples or groups of three or more travelling together, which underscores the demographic data describing age ranges of visitors. Families travelling with children comprised 12% of respondents overall.

Summer is the predictably the most popular season to visit, although more than a third showed a preference for travelling to the region in the shoulder spring and fall seasons.

Visitors most liked scenic beauty; the environment; and visiting friends and family. Other lifestyle factors such as clean air and the slower pace of life were also important to visitors. Visitors also enjoyed the availability of outdoor activities; friendly people; wildlife viewing opportunities; and access to marine activities.

Almost 90% indicated it was very likely they would return-those who indicated it was somewhat likely or not very likely they would return gave the most common reasons as their advancing age and/or the distance they would need to travel in order to return to the Region. This was especially true of International visitors.

Anecdotally, four themes emerged in visitor comments; scenic beauty; friendly people; quality of life and transportation issues. The majority of comments were recorded verbatim; were positive; and speak well of the Vancouver Island region. However, visitor comments should be reviewed in the appropriate section of the report for readers to come to their own conclusions.

Transportation and transportation related issues appear to garner the highest proportion of negative comments, however, it should be noted that not all recorded comments are presented in this report. It should be stated that specific transportation related issues, per se, are outside the scope and mandate of this survey. Clearly, transportation and access is critical to the region's tourism industry and its stakeholders. In closing, further in-depth of transportation related issues research should be considered to better understand the implications of this very important topic.

## Appendix—Exit Survey

Good morning / afternoon / evening. My name is \_\_\_\_\_ and I'm conducting a survey on behalf of Tourism Vancouver Island. I'd like to ask you about your trip to the Vancouver Island region. May I please speak with someone in your travel party who is knowledgeable about your trip planning and expenditures?

1. Would you have approximately 8 minutes to answer some questions? If you participate, we would like to offer you a token of our appreciation for your time.

- YES       NO      Are you sure? You will receive a token of our appreciation for completing the interview?

Thank you.

2. Have you or anyone in your travelling party previously participated in a survey for Tourism Vancouver Island on this trip?

YES      You need only to complete one questionnaire on this trip. Thank you for your cooperation and enjoy your stay here today.

NO

3. Where do you live (usual place of residence)? **(USE CODE)**

VANCOUVER ISLAND & THE GULF ISLANDS **EXIT SURVEY**      Thanks for agreeing to participate, however we are only interviewing non residents

BC      Go to **Q5**

PROVINCE:      Go to **Q6**

\_\_\_\_\_

STATE:      Go to **Q6**

\_\_\_\_\_

INTERNATIONAL:      Go to **Q6**

4. Are you part of an organized tour group?

NO       YES **EXIT SURVEY** Thanks for agreeing to participate, however we are only interviewing independent travellers.

---

5. To start, we have a few questions about your current trip.

**IF FROM BC** What was the **primary** purpose of your trip? Was it for Leisure, Visiting Friends and Family or Business?

LEISURE      Go to **Q7**

VISITING FRIENDS & FAMILY      Go to **Q7**



- ATTENDED A CONFERENCE
- ATTENDED A MEETING
- BEEN HERE BEFORE FOR LEISURE
- BEEN HERE BEFORE FOR BUSINESS
- OTHER \_\_\_\_\_
- OTHER \_\_\_\_\_

f) On this trip, did you spend any time participating in a leisure activity?  
 YES       NO       DK/NR

g) What was your primary leisure activity? \_\_\_\_\_

h) Other leisure activity? \_\_\_\_\_

i) How long did you spend on your leisure activity?

\_\_\_\_\_ HOURS      OR      \_\_\_\_\_ DAYS       DK/NR

j) How likely is that you will return to Vancouver Island for pleasure?

VERY LIKELY       LIKELY       SOMEWHAT LIKELY       NOT VERY LIKELY       NOT AT ALL LIKELY       DK/NR

**That concludes our interview. Thank you for participating!**

7. On this trip, what was your **primary** destination on Vancouver Island and the Gulf Islands (place that you spent the most time)?

\_\_\_\_\_  NONE, TOURING       DK/NR

8. We are interested in the places people visit while travelling in the Vancouver Island and the Gulf Islands. On this trip, did you stop and spend time at (At least 1 hour)... (*Consult **Regional District Map***)

- |   |                              |                             |                                |
|---|------------------------------|-----------------------------|--------------------------------|
| a) South Island (Victoria, Sooke, Sidney)                 | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| b) Central Island (Nanaimo, Parksville, Coombs, Qualicum) | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| c) South Central (Duncan, Chemainus)                      | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| d) Pacific Rim (Port Alberni, Tofino, Ucluelet)           | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| e) North Central (Courtenay / Comox, Campbell River)      | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| f) North Island (Port McNeill, Port Hardy)                | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |
| g) Gulf Islands   | <input type="checkbox"/> YES | <input type="checkbox"/> NO | <input type="checkbox"/> DK/NR |

9. How did you get to Vancouver Island?

- |                                      |   |  |   |
|--------------------------------------|---|--|---|
| a) BC FERRIES                        | <input type="checkbox"/> Nanaimo/Duke Point | <input type="checkbox"/> Nanaimo/Tsawassen | <input type="checkbox"/> Swartz Bay               |
| b) US FERRIES                        | <input type="checkbox"/> MV Coho            | <input type="checkbox"/> Clipper           | <input type="checkbox"/> Washington State Ferries |
| c) COMMERCIAL AIRLINE <b>SPECIFY</b> | <input type="checkbox"/> _____              |  |   |
| d) FLOAT PLANE <b>SPECIFY</b>        | <input type="checkbox"/> _____              |  |   |
| e) PLEASURE CRAFT/PRIVATE VESSEL     |   |  |   |
| f) OTHER <b>SPECIFY</b>              | <input type="checkbox"/> _____              |  |   |

**IF HARBOUR AIR...**

- |  |   |                                      |  |
|--|---|--------------------------------------|--|
|  | <input type="checkbox"/> SCHEDULED FLIGHT | <input type="checkbox"/> SCENIC TOUR | <input type="checkbox"/> PRIVATE CHARTER |
|--|---|--------------------------------------|--|
- a) How did you hear about Harbour Air's services?
- b) What service(s) are you experiencing today?

**IF FROM BC** 10. What was your **primary** (most often used) mode of transportation while on this trip?

CAR/TRUCK/MC     RV     BUS     BICYCLE     OTHER \_\_\_\_\_     DK/NR

**IF NOT FROM BC** 11. What was your **primary** (most often used) mode of transportation while on Vancouver Island and Gulf Islands?

CAR/TRUCK/MC     RV     BUS     BICYCLE     OTHER \_\_\_\_\_     DK/NR

12. Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ Days (**Consult calendar; include day left and day returning**)

13. How many of those days will be spent travelling in British Columbia? \_\_\_\_\_ Days

14. And how much time was spent on Vancouver Island and the Gulf Islands?

NONE - JUST PASSING THROUGH    \_\_\_\_\_ HOURS    OR    \_\_\_\_\_ NIGHTS     DK/NR

**IF SPENDING TIME IN REGION** 15. What is your **primary** (most time spent) leisure activity while on Vancouver Island and the Gulf Islands?

\_\_\_\_\_  NONE  DK/NR

16. On this trip, which of the following best describes your **primary** (most often used) type of accommodation on Vancouver Island and the Gulf Islands?

Resort/Hotel/Motel/B&B     Campground/RV     FRIENDS Or Relatives     NOT OVERNIGHT     OTHER \_\_\_\_\_

17. What kinds of activities would you like to do if you came back to VI? What would bring you back to Vancouver Island and the Gulf Islands? (**Don't prompt, record multiple responses, if any**)

- |   |  |
|---|--|
| <input type="checkbox"/> FAMILY/FRIENDS | <input type="checkbox"/> FRIENDLY PEOPLE   |
| <input type="checkbox"/> ATTRACTIONS    | <input type="checkbox"/> SCENIC BEAUTY     |
| <input type="checkbox"/> ARTS & CULTURE | <input type="checkbox"/> KAYAKING          |
| <input type="checkbox"/> CAMPING        | <input type="checkbox"/> FISHING           |
| <input type="checkbox"/> PUBLIC GARDENS | <input type="checkbox"/> MARINE ACTIVITIES |
| <input type="checkbox"/> HIKING         | <input type="checkbox"/> WALKING           |

WINERIES

CUISINE/FINE DINING

SHOPPING

FIRST NATIONS

FESTIVALS

OTHER

DK/NR

OTHER \_\_\_\_\_

**ASK IF OVERNIGHT TRAVELLERS** 18. In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

\$ \_\_\_\_\_  BEGAN TRIP TODAY  DK/NR

**ASK IF DAY TRIPPERS** 19. In Canadian dollars, what will your travel party's total expenditures be today?

\$ \_\_\_\_\_  BEGAN TRIP TODAY  DK/NR

---

**I would now like to ask you some questions about your previous travels to Vancouver Island and the Gulf Islands.**

20. Before this trip, had you been to Vancouver Island and the Gulf Islands?

YES *Go to Q21*  NO *Go to Q22*  DK/NR *Go to Q22*

21. How many times have you visited Vancouver Island and the Gulf Islands in the past two years excluding this trip? \_\_\_\_\_ Time(s)

**ASK HOW HEARD ABOUT V.I.** 22. How did you *first* hear about Vancouver Island and the Gulf Islands? Select all that apply (**Don't prompt, record responses**)

TRAVEL SITES—Trip Advisor etc

NEWSPAPER/MAGAZINE

VISITOR CENTRE

BROCHURE AT OTHER ATTRACTION

BROCHURE AT ACCOMMODATIONS

Vancouver Island WEBSITE

FROM FAMILY/FRIENDS

Other INTERNET sites

TOURISM GUIDE

BEEN HERE BEFORE

DK/NR

OTHER \_\_\_\_\_

**ASK HOW PLANNED FOR TRIP.** 23. What was the *primary* information source you used to plan your trip to Vancouver Island and the Gulf Islands? (**Don't prompt, record response**)

- |  |   |
|--|---|
| <input type="checkbox"/> INTERNET other than VI site       | <input type="checkbox"/> NEWSPAPER                      |
| <input type="checkbox"/> VISITOR CENTRE                    | <input type="checkbox"/> BROCHURE AT OTHER ATTRACTION   |
| <input type="checkbox"/> BROCHURE AT ACCOMMODATIONS        | <input type="checkbox"/> Vancouver Island WEBSITE       |
| <input type="checkbox"/> FROM FAMILY/FRIENDS               | <input type="checkbox"/> TRAVEL SITES—Trip Advisor, etc |
| <input type="checkbox"/> TOURISM GUIDE                     | <input type="checkbox"/> BEEN HERE BEFORE               |
| <input type="checkbox"/> DK/NR <b>IF CHECKED GO TO Q25</b> | <input type="checkbox"/> OTHER _____                    |

24. Did you find that information useful?

- |                                      |  |  |  |                                |
|--------------------------------------|--|--|--|--------------------------------|
| <input type="checkbox"/> VERY USEFUL | <input type="checkbox"/> SOMEWHAT USEFUL | <input type="checkbox"/> NOT VERY USEFUL | <input type="checkbox"/> NOT AT ALL USEFUL | <input type="checkbox"/> DK/NR |
|--------------------------------------|--|--|--|--------------------------------|

25. On a scale of 0 to 10, **how important** was Vancouver Island and the Gulf Islands in your decision to **visit British Columbia**?

0 indicates no influence at all and 10 indicates that Vancouver Island and the Gulf Islands was the single main reason for visiting this province. \_\_\_\_\_

26. What were your *primary* motivation for your visit to Vancouver Island and the Gulf Islands? (**Don't prompt, record first response**)

- |  |   |
|--|---|
| <input type="checkbox"/> VALUE FOR MONEY | <input type="checkbox"/> SAFETY             |
| <input type="checkbox"/> SCENIC BEAUTY   | <input type="checkbox"/> TRANSPORTATION     |
| <input type="checkbox"/> FRIENDLY PEOPLE | <input type="checkbox"/> OUTDOOR ACTIVITIES |
| <input type="checkbox"/> ATTRACTIONS     | <input type="checkbox"/> WILDLIFE           |
| <input type="checkbox"/> EASE OF ACCESS  | <input type="checkbox"/> MARINE ACTIVITIES  |
| <input type="checkbox"/> ENVIRONMENT     | <input type="checkbox"/> FIRST NATIONS      |

ARTS & CULTURE

OTHER \_\_\_\_\_

DK/NR

OTHER \_\_\_\_\_

27. What did you like **most** about Vancouver Island and the Gulf Islands? (**Don't prompt, record multiple responses if any**)

VALUE FOR MONEY

SAFETY

SCENIC BEAUTY

TRANSPORTATION

FRIENDLY PEOPLE

OUTDOOR ACTIVITIES

ATTRACTIONS

WILDLIFE

EASE OF ACCESS

MARINE ACTIVITIES

ENVIRONMENT

FIRST NATIONS

ARTS & CULTURE

OTHER \_\_\_\_\_

DK/NR

OTHER \_\_\_\_\_

28. How satisfied are you with your trip to Vancouver Island and the Gulf Islands?

VERY SATISFIED

SOMEWHAT SATISFIED

NEUTRAL

SOMEWHAT DISSATISFIED

VERY DISSATISFIED

DK/NR

29. How likely is that you will return to Vancouver Island and the Gulf Islands for pleasure?

VERY LIKELY

SOMEWHAT LIKELY

NOT VERY LIKELY

NOT AT ALL LIKELY

DK/NR

30. What time of year do you plan to return?

WINTER

SPRING

SUMMER

FALL

**Now, I'd like to ask a few more questions about you.**

---

31. Including you, how many people are in your travel party today? How many are children under18 and how many are adults?

\_\_\_\_\_ Adult(s)      \_\_\_\_\_ Child(ren) (under 18)      = \_\_\_\_\_  
Total

32. How many leisure trips have you taken in the past 12 months including this trip?

\_\_\_\_\_  DK/NR

33. In which age category are you?

A. UNDER 24 YEARS

E. 55-64 YEARS

B. 25-34 YEARS

F. 65 YEARS OR OLDER

C. 35-44 YEARS

G. DK/NR

D. 45-54 YEARS

34. What is the highest level of education that you have completed?

A. LESS THAN HIGH SCHOOL

E. UNIVERSITY DEGREE

B. HIGH SCHOOL

F. MASTERS/PHD DEGREE

C. SOME TECHNICAL COLLEGE OR UNIVERSITY

G. OTHER \_\_\_\_\_

D. COLLEGE OR TECHNICAL DIPLOMA

H. DK/NR

35. Gender of respondent (**Record, don't ask**)

MALE

FEMALE

36. Do you have any comments that you would like to share with us?

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37. As a follow-up to this interview, we would like to contact you after your trip to inquire about the rest of your trip to British Columbia, Vancouver Island and the Gulf Islands. Participation would involve completing a questionnaire that will be emailed to you. All contact information will be kept confidential and only used for this study. Would you be willing to participate?

YES

NO

***IF YES (DOUBLE CHECK ADDRESS/INFO FOR ACCURACY)***

May I get your name and email address?

Name:
Email Address:

**Thank you for participating!**

