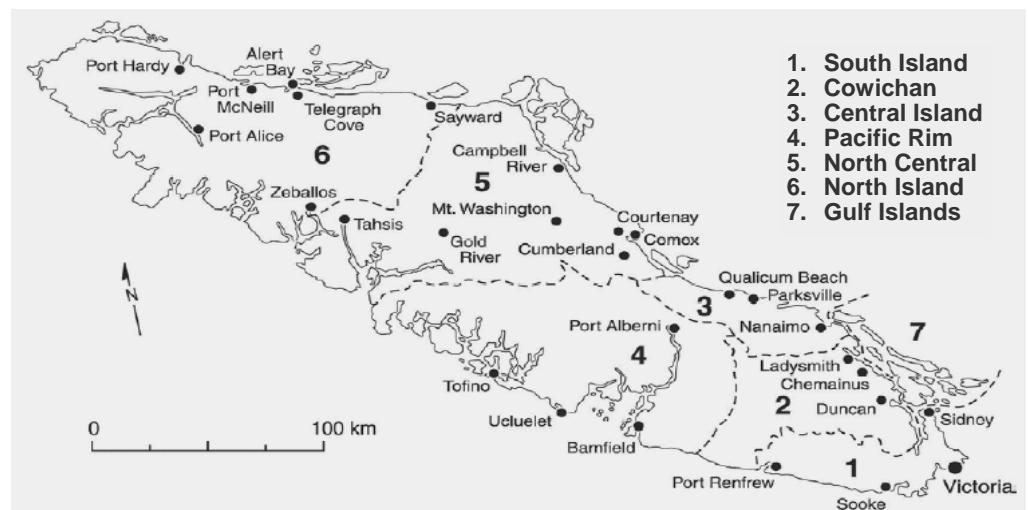


Visitor Profile - *Cowichan Region*

The Project

The Tourism Labour Market Research Project, was designed to study the tourism labour market throughout the Vancouver Island region. The Visitor Survey component of the project was designed to sample Visitors to the regions through four seasons commencing in the Fall of 2002.

In order to make informed decisions about tourism, it is important to understand the profile of visitors to your region. This summary provides a profile of visitors to the Cowichan region during the 2002-2003 year. The data was obtained from the Tourism Labour Market Research Project initiated by Tourism Vancouver Island and Malaspina University-College.



The Cowichan Valley is known as "The Napa Valley of the North"

Special points of interest:

- 7,423 visitors to Vancouver Island in all regions took part in this study.
- Visitors were intercepted in all four seasons of 2002.
- A report for each of the seasons' findings can be viewed online. (see pg 7)
- One of the goals of this study was to measure visitors expectations, trip profiles, and level of satisfaction of their experience.

Methodology

Tourism Vancouver Island recognizes seven distinct marketing regions within the Vancouver Island Region. A field research team was assembled from 6 of the Regions to conduct visitor surveys. Each researcher was provided with a sampling plan that identified various locations within the region where approvals had been obtained to conduct visitor intercepts. Within each region sampling locations were chosen to be representative of the various sectors of the tourism industry identified including;

- accommodation,
- transportation,
- travel information centers,
- outdoor recreation and sport,
- attractions, including festivals and events, and
- arts and culture

The field researchers intercepted visitors randomly at various sampling locations. The visitors were asked if they would consent to participate in the study by completing the survey instrument. Visitors that agreed were asked to sign a consent form

indicating that they were completing the survey on a voluntary basis.

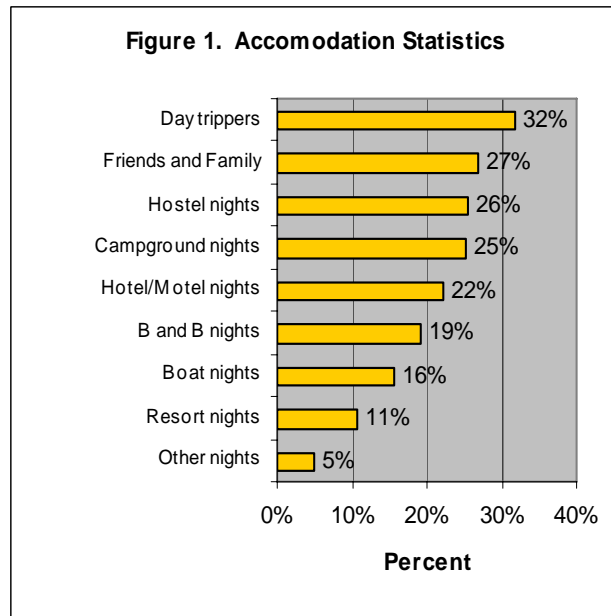
Researchers forwarded the completed surveys to the project office on a weekly basis where they were kept secure and confidential. The data was entered into an excel spreadsheet by an outside contractor (Express Data Ltd.) utilizing a double-entry system and the resulting file was forwarded to Malaspina University-College for transfer into SPSS and subsequent analysis.

Results of Cowichan Region Visitors

Accommodations

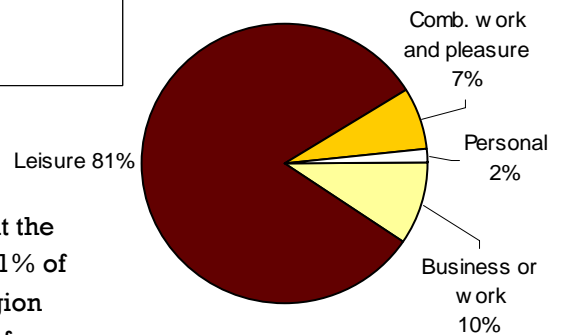
Figure 1. Visitors were asked to indicate which forms of accommodation they would be using during their time on Vancouver Island.

* Multiply accommodations can be used therefore percent does not equal 100%



1,000 visitors to the Cowichan region were intercepted in all seasons of 2002.

Figure 2. Purpose of Trip



Trip Purpose

Figure 2. When asked what the purpose of their visit was, 81% of visitors to the Cowichan region indicated that their trip was for leisure purposes.

Transportation

Figure 3. Visitors were asked to indicate what type(s) of transportation they used to travel while on Vancouver Island or the Gulf Islands.

*Multiple forms of transportation can be used therefore percent does not equal 100%

Figure 3. Transportation Statistics

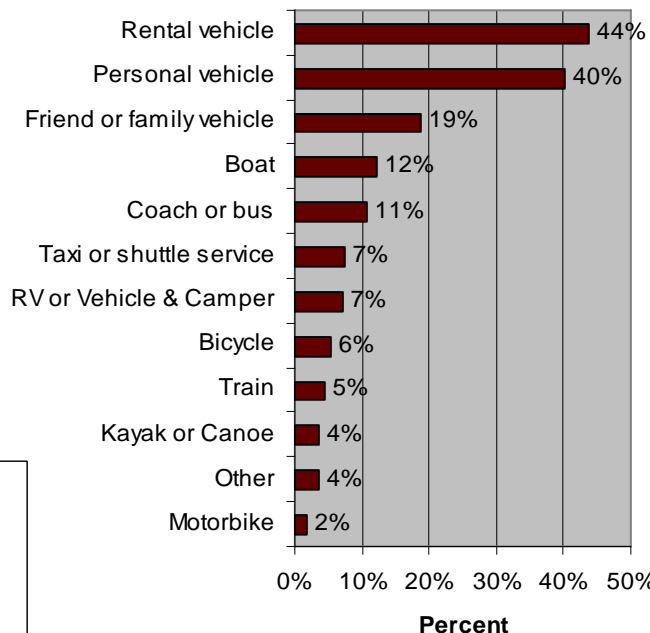
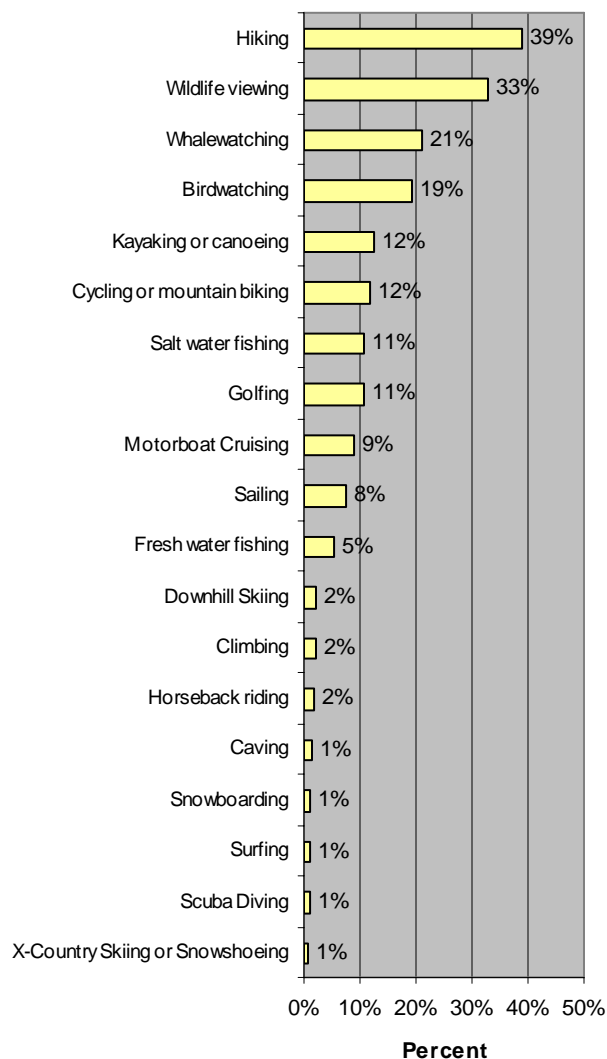


Figure 4. Activities Participated In



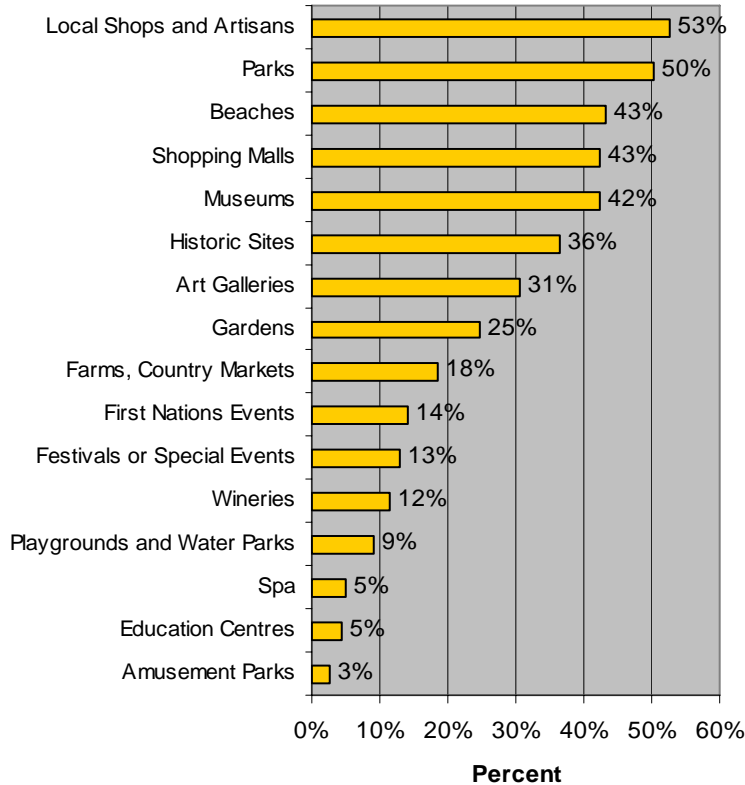
Activities

Figure 4. Visitors to the Cowichan region indicated which types of outdoor recreation activities their group had participated in or planned to participate in during their stay. **Hiking** was the number one choice with 39% indicating they had participated in, or intended to participate during their visit.



Nitnat Lake

Figure 5. Tourism Attractions



Attractions

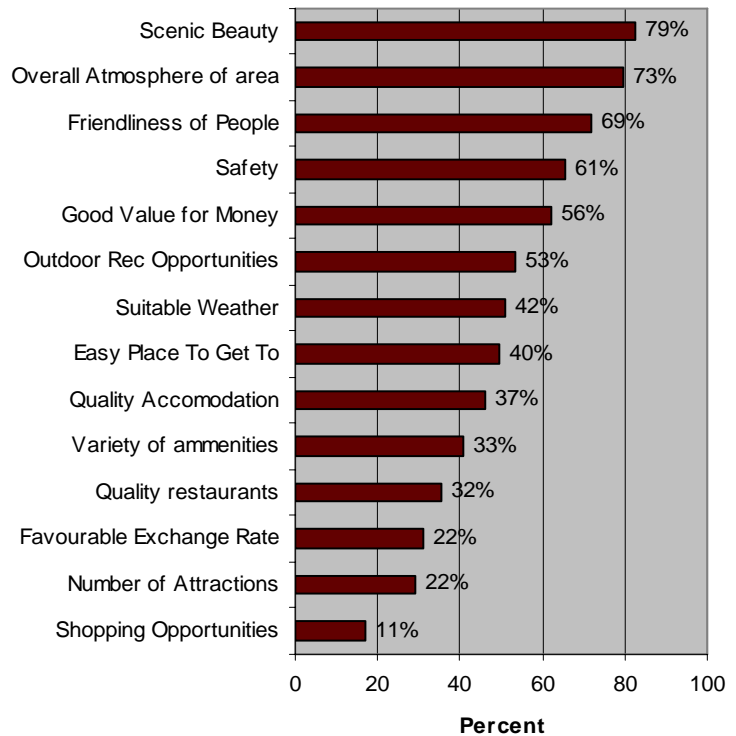
Figure 5. Visitors to the Cowichan region were asked to indicate which tourism attractions members of their group visited or planned to visit during their stay.



Features of Importance

Figure 6. Visitors were given a list of 14 features and asked to rate how important each feature was in their decision to visit the Cowichan region. For each feature they could respond from 'Not at all important' through to 'Extremely important.' Figure 6 shows the results of the 'high' and 'extremely' important responses.

Figure 6. Features Highly Important

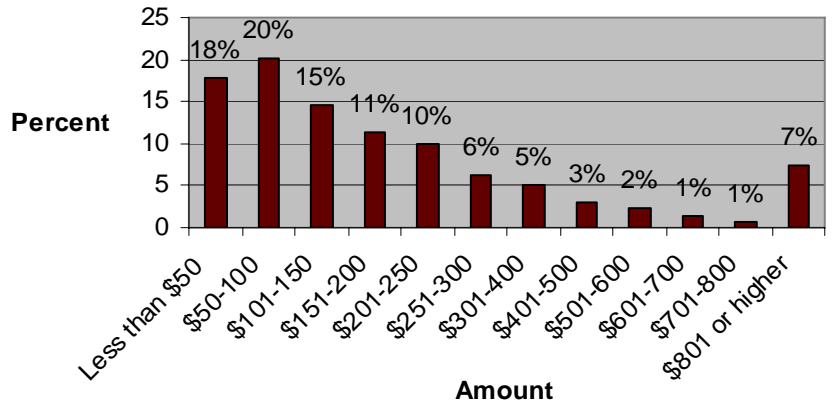


Spending

Figure 7. To gather data on group spending, visitors were asked approximately how much money their group spent the day before in Canadian Dollars (including accommodations, transportation, entertainment, food, and shopping).

Average daily spending in the Cowichan region = \$216.50

Figure 7. Group Spending



Planning

Figure 8. Shows that 40% of people planned their trip between one to six months in advance.

Figure 8. Trip Planning

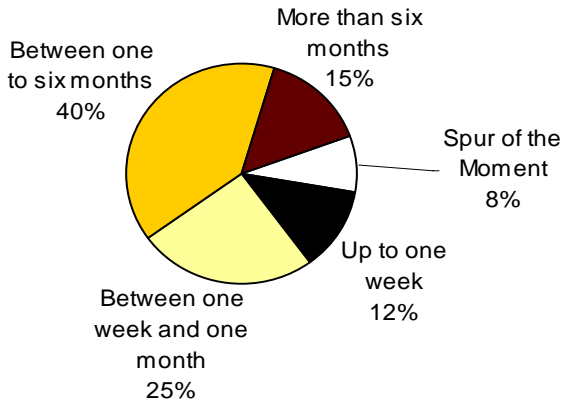
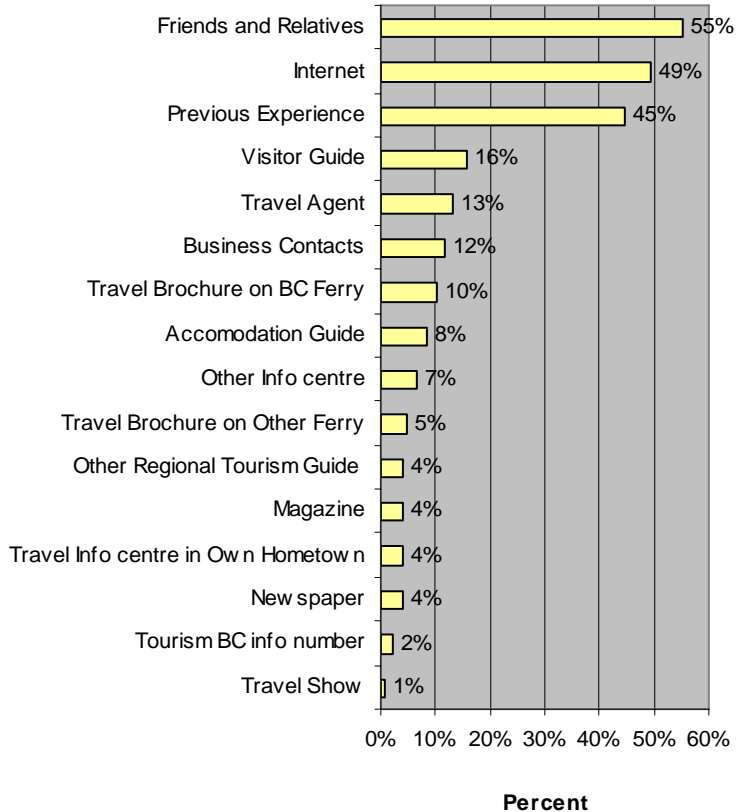


Figure 9. Sources of Information for Planning



Sources of Information

Figure 9. Visitors were asked to indicate which type(s) of sources of information they used to plan for their trip.

The large majority of visitors used Friends and relatives (55%), the Internet (49%) and Previous Experience (45%) as sources of information to plan their trip to the Cowichan region.

*Multiple sources can be used therefore percent does not equal 100%.

Age of Visitors

Figure 11. The age of individuals in each group of visitors is illustrated by this graph.

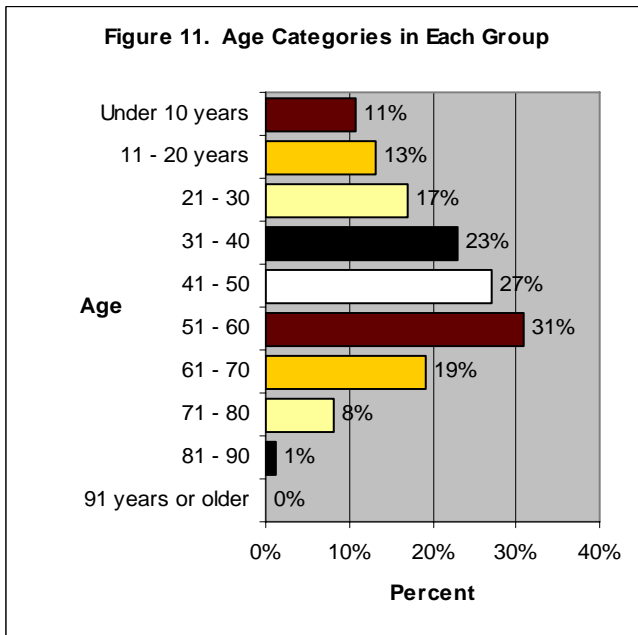
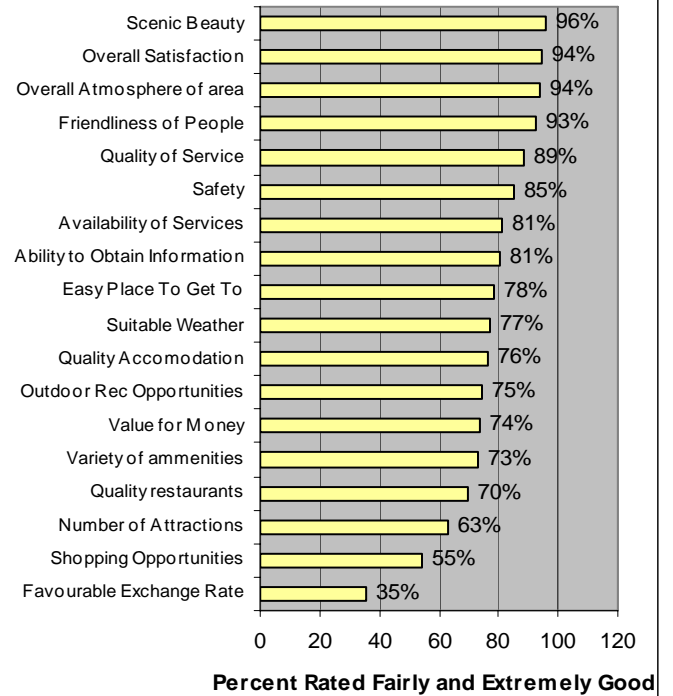


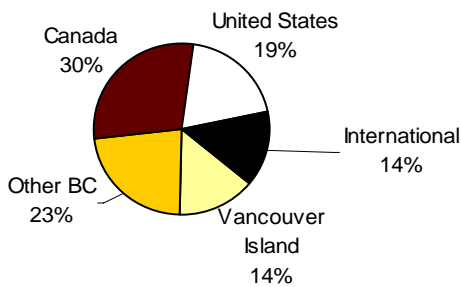
Figure 10. Evaluating Trip Aspects



Evaluation

Figure 10. Using many of the same features from Figure 6, visitors were asked to evaluate various aspects of their trip. For each aspect they could respond from 'Extremely Bad' through to 'Extremely Good' or 'Not Applicable.' This Figure shows the responses of those that responded with a rating of 'Fairly Good' or 'Extremely Good.'

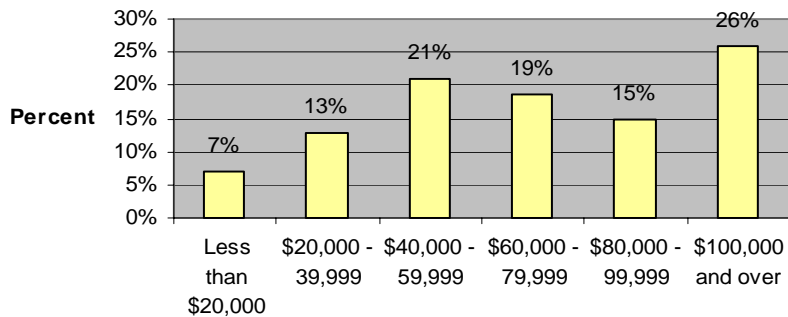
Figure 12. Location of Residence by Region



Residence

Figure 12. Visitors were asked to indicate where they lived. This data was then grouped into regions.

Figure 13. Annual Household Income



Tourism Labour Market Research Project

For more information on this project and its results, Contact:

Nicole Vaugeois
Recreation & Tourism Management Department
Malaspina University College
900 Fifth St
Nanaimo, BC
V9R 5S5

Phone: 250-753-3245 ext.2772
Fax: 250-740-6400
E-mail: vaugeois@mala.bc.ca

Further Results and Reports on the findings of the Tourism Labour Market Research Project can be viewed at:
<http://www.tourismvi.ca/research/>

Regional Profiles are available for the seven regions of Vancouver Island.

Household Income

Figure 13. Categories of income ranges were shown to visitors, and they were asked to identify which range their annual household income before taxes was.

Conclusion

The overall results of the project are that:

- Demand for a variety of tourism products exists throughout the entire Vancouver Island Region.
- Regional visitation is generating significant economic returns for a variety of tourism related businesses.
- Demand for emerging sectors of the tourism industry is evident.

This information can be used to help grow and sustain the tourism labour market on Vancouver Island by:

- Providing local, current information for business plan and marketing plan development.
- By providing support and information to existing tourism organizations to help attract increased visitation thereby creating additional employment opportunities.



A Partnership
Between

