

TOURISM LABOUR MARKET RESEARCH PROJECT



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Phase II - Fall 2002 Visitor Survey Results

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Submitted by:

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Tourism Labour Market Research In the Vancouver Island Region, British Columbia Fall 2002 Visitor Survey Results

1. Executive Summary

The Tourism Labour Market Research Project, co-organized by Malaspina University College and Tourism Vancouver Island, was funded by HRDC to study the tourism labour market in the Vancouver Island region in the fall of 2002. The project included three complimentary research programs including; 1) a mail survey to tourism organizations, 2) follow-up in depth interviews, and 3) a series of visitor surveys commencing in the fall and continuing through the summer of 2003. This report will summarize the findings of the results of the Fall visitor surveys.

Description of the project:

This component of the research project involved the acquisition of data concerning the needs and expectations of the Tourism Markets coming to the Vancouver Island Region as well as those traveling between Regions on Vancouver Island. The resulting data will assist the tourism industry by; 1) determining the demand for various tourism products throughout the Vancouver Island Region, 2) developing baseline measurements of the scope and value of the tourism market throughout the Region, 3) measuring the consumers preferences, and 4) assessing the future of tourism demand. Visitor surveys were obtained in 6 of the 7 Regions of Vancouver Island in the Fall of 2002.

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; 1) accommodation, 2) transportation, 3) travel information centres, 4) outdoor recreation and sport, 5) attractions, including festivals and events, and 6) arts and culture.

The project manager and research coordinator worked from the TAVI office in Nanaimo and the manager communicated with the field research team by telephone and email with occasional debriefings held in Nanaimo. The field researchers were expected to collect approximately 30 surveys per week For a period of 10 weeks.

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 Fall survey data was entered into an excel spreadsheet by a staff member in the project office and the resulting file was given to Malaspina University-College for transfer into SPSS and subsequent analysis of the data.

Outcomes:

Visitors were intercepted by the researchers throughout the Vancouver Island Region for a period of approximately 8 weeks commencing in late October. A total of 567 surveys were completed.

The results indicate that 39.8% of those visitors stayed within the region for a period of 2-5 days with 8.1% staying only one night and 16.5% of the sample participated in a day trip. 38.8% of the visitors chose a hotel or motel as their preferred accommodation with 16.5% choosing resort properties and 34% of the fall sample stayed with friends or relatives.

BC Ferries was utilized by 32.6 % of the sample with a further 26.6% traveling by air. 82.8% of the responses indicated overall satisfaction with the mode of travel to the Vancouver Island Region.

59% of the sample was visiting for pleasure with a further 26.5% traveling for business or work and 7.2% were combining both activities.

While traveling within the region the most popular outdoor activities included; hiking (28.5%), wildlife viewing (20%) and birding (9.7%) and the most popular attractions were; local shops and artisans (32.6%), shopping malls (32.4%), parks (30.1%), beaches (26.7%), museums (20.7%), art galleries (17.3%) and historic sites (15.9%).

31% of the visitors reported eating at home or with friends and relatives. 28.7% of the sample utilized family restaurants, 23.9% pubs or lounges, and 21.2% chose fine dining establishments.

The features of the Vancouver Island Region which drew visitors to the area were very clear with 71.1% indicating the overall atmosphere of the area, 69.3% the scenic beauty, 64.9% friendliness of the people, 63.4% safety of the Region, and 55.8% value for money spent.

79.7% of the sample was repeat visitation with 20.2% making their first visit to the Vancouver Island Region.

Of all sources of information used to plan their trip the highest percentages involved; friends and relatives (44.1%), the internet (41.1%), and previous personal experience (32.2%). The largest portion of the sample first learned about the Vancouver Island Region from friends and relatives (53.8%).

The sample response was very positive when asked of their satisfaction with their traveling experience with 90% of the sample indicating they would recommend the region to others and 88.2% indicating that they would return to the Vancouver Island Region. Overall, 94.2% of the visitors rated their satisfaction level as good or extremely good.

The sample provided a visitor profile indicating that the fall visitor typically traveled with their spouse (36.6%) or alone (31.2%), and the age distribution followed typical age demographics with the majority of visitors between the ages of 31-60. 21.8% of the sample reported annual household incomes over \$100,000 while 21.2% reported income levels of \$39,999 or less.

Of the fall visitors 34% were traveling from other regions on Vancouver Island while 24% were arriving from other areas within the Province. The second largest market was from Alberta (16.5 %) with travel from other areas within Canada representing approximately 6% of the sample. The remainder of the sample (6%) was traveling from international markets.

The results of the fall survey indicate a number of facts:

- Demand for a variety of Tourism Products exists in the fall season throughout the entire Vancouver Island Region.
- Fall visitors generate economic activity throughout the Vancouver Island Region in both Tourism related businesses as well as in support infrastructure.
- Demand for emerging segments of the tourism industry is strong.
- The “Natural Environment” of the Vancouver Island Region is one of its’ most important assets along with the friendliness of its’ people.

2. Introduction

Building capacity in the Tourism Industry in the Vancouver Island Region requires detailed market information on the various tourism sectors as well as a determination of demand for different types of tourism. One of the goals of the Tourism Labour Market Research Project was to measure visitors expectations, trip profiles and level of satisfaction of their experience. The visitor survey was conducted from late October through December 2002.

Although Tourism British Columbia has produced studies reporting estimates of the total number of visitors to the Vancouver Island Region¹, detailed information about where those visitors travel, what they spend and what their preferences are has not been measured on a regional basis. Tourism organizations and individual business and event operators in the Vancouver Island region are often requesting information from Tourism Vancouver Island and Malaspina University-College on the profile of visitors. They need this information to develop business plans, market their products and services and ultimately grow their business. Without this information, organizations are left to "guess" who is coming, what they expect on their visit and how satisfied they were with their experience. Solid visitor information will allow these organizations to assume less risk in decision making, and with greater collective success, develop a sustainable tourism industry throughout the Vancouver Island Regions. The visitor survey component of this study identifies the value and scope of tourism created by both Inter and intra regional Visitors to Vancouver Island.

The Visitor Survey is one component of a research project that was established in 2002 by the Tourism Association of Vancouver Island and the Recreation and Tourism Research Institute of Malaspina University College with funding support from the Government of Canada through the Human Resources Development Centre in Nanaimo.

¹ British Columbia Tourism Study-Report on Visitors to Vancouver Island Tourism Region, Tourism British Columbia, 1998

3. Methodology-Visitor Surveys

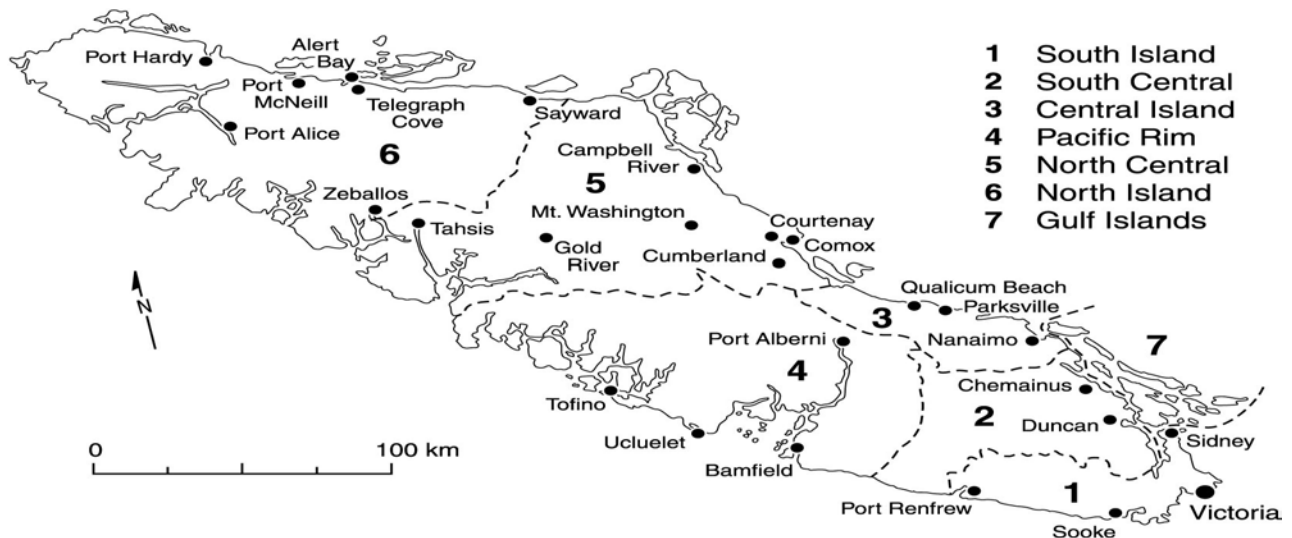
The research project was based out of the Tourism Vancouver Island office in Nanaimo. The Project Manager coordinated the field research team and determined the sampling locations. Development of the research instrument and data analysis was completed by the Research Coordinator and Faculty in the Recreation and Tourism Research Institute at Malaspina University-College.

An Advisory Committee was formed of Tourism Industry Professionals to provide input on the research methodology and the research instrument as well as to guide the long-term viability of the project. The experience of the committee is extremely broad and is representative of many of the tourism sectors being measured by the research. The Committee met twice during the initial phase of the project and is scheduled to meet regularly throughout the remaining phases of the project.

The visitor survey instrument was developed by the Research Coordinator with input from the Advisory Committee. It was later field-tested by the Research team at Malaspina University College prior to being used.

Prior to intercepting any visitors, the research methods and instruments were approved by the Human Subjects Committee at Malaspina University-College.

A field research team was assembled with six researchers located in different areas within the Vancouver Island Region as delineated on the following map.



Each Field Researcher was trained by the Research Coordinator and was provided with a sampling plan which detailed locations where permissions had been obtained to intercept visitors on site. The sampling plans included locations across a range of tourism sectors in each region including; transportation, accommodation, outdoor recreation and sport, attractions, arts and culture, festivals and events and visitor information centres.

The Fall sampling period was initially established for 10 weeks commencing in early September. Due to delays in the project start up the fall sample period did not commence until the last week of October, 2002. The project proposal tasked each field researcher with

intercepting 30 Visitors per week for a ten week period (n=300 x 6 regions) The project budget provided for each researcher to work at total of 14 hours per week.

The visitor surveys were coded with individual survey numbers and regional identification numbers. This method was designed to provide the project manager and the research team with the ability to manage the sample and to perform intra regional analysis, by tourism sector and by sampling season.

The field researchers worked with operators to determine appropriate times to intercept visitors to the respective locations. The researchers qualified the participants by enquiring whether they were traveling from outside the region. If qualified as a visitor, the individual was asked to sign a consent form prior to completing the survey instrument. The signed consent forms were returned to the project manager with the completed surveys and have been stored in a secure facility at the project office.

The field researchers forwarded completed surveys to the project office on a weekly basis and the project manager was able to track each researcher's progress. The collected data was entered into an excel spreadsheet in-house and that information was forwarded to the research team at Malaspina University College for transfer to an SPSS database and subsequent analysis resulting in the findings included in this report.

As the data for the subsequent sampling periods is added to the fall survey data, it will be possible to determine seasonal variations in product demand as well as opportunities for new product development.

4. Findings

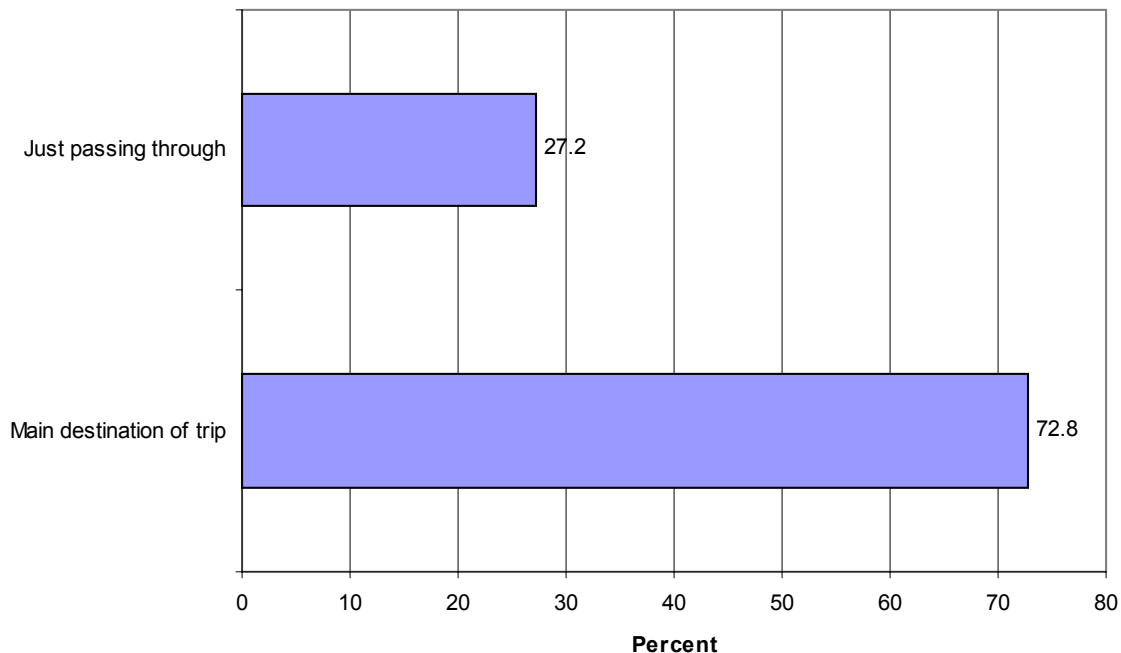
This section will report on the findings of the visitor surveys conducted in the fall of 2002 throughout 6 of the 7 marketing areas in the Vancouver Island Region. Data was collected from October 28th, 2002 through December 31st resulting in a total of 567 surveys completed. The surveys were designed to capture information about the visitor and their activities and experiences while visiting various areas within the Vancouver Island Region.

a.) Characteristics of Travel Experience:

i. Primary destination

Individuals were asked to indicate whether the Vancouver Island region was the main destination for their trip or if they were just passing through. As shown in Figure 1, 72.8 percent of respondents indicated that the Vancouver Island was their main destination and 27.2 percent indicated they were just passing through. The following question will shed light on the other destinations individuals combined with a trip to the Vancouver Island region.

Figure 1. Nature of Visit (Q.1)

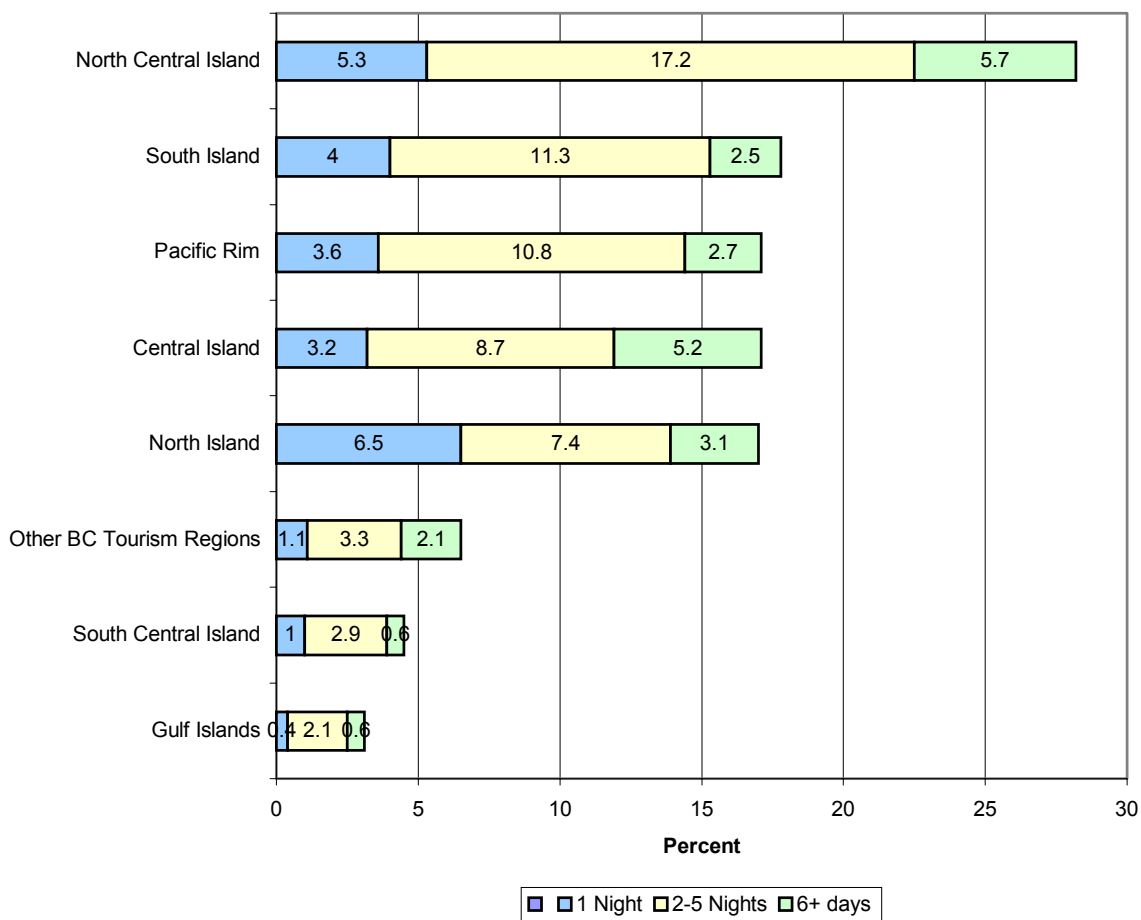


ii. How many nights did visitors spend in each region?

Respondents were asked to record the number of nights that they spent in each of the Vancouver Island regions (see figure 2). The data indicated a consistent pattern in the length of stay for fall visitors where the highest percentage in each region is staying between 2 – 5 nights. The North Central region appears to have received higher visitation, but this is due to the fact that a higher number of surveys were collected in that region. Similarly, the visitation figures for the Gulf Islands and the South Central Island region should be taken with caution as there were complications intercepting visitors in those regions, resulting in low overall collection rates.

Approximately 6.5 percent of visitors were staying in other British Columbia tourism regions on their trip.

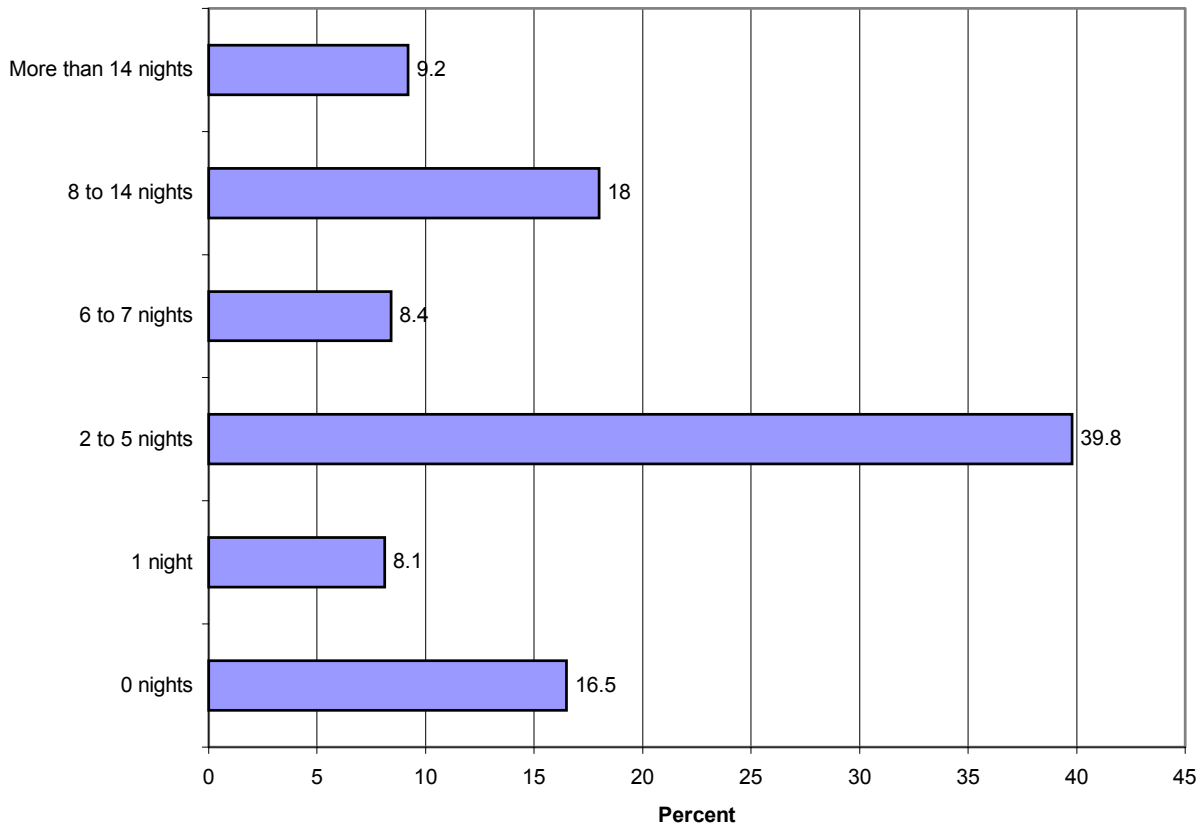
Figure 2. Nights Stayed in Each Region (Q.2)



iii. How many nights did visitors spend away from home?

Individuals were asked how many nights they were away from home in total on this trip. Figure 3 indicates the highest percentage of visitors (39.8%) is spending between 2-5 days in the Vancouver Island region, and a further 8.4% are staying up to one week. The Island region is hosting 18 percent of visitors up to 2 weeks, and 9.2% beyond. A smaller percentage (8.1%) is visiting the Island region for only one night, while 16.5% were on a day trip.

Figure 3. Nights Away From Home (Q.3)



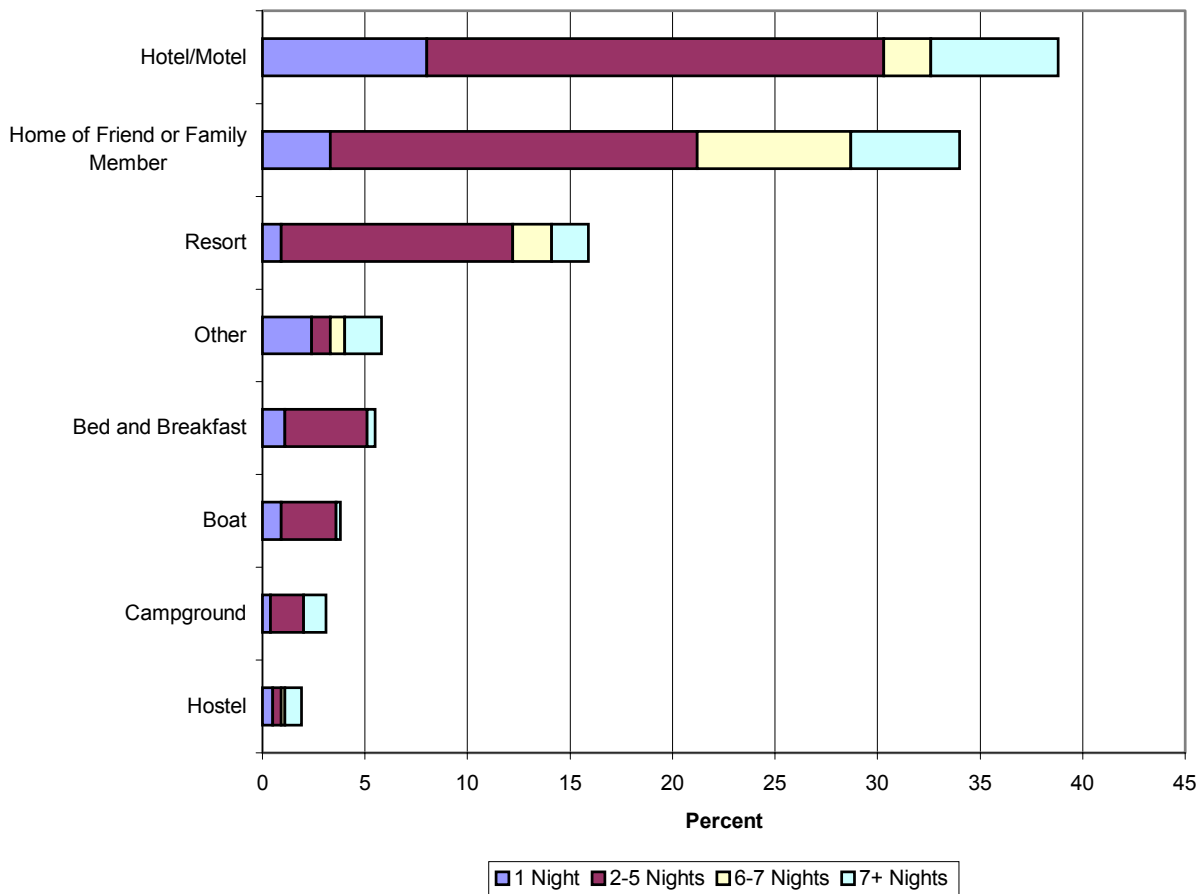
iv. What type of accommodation did visitors use on their trip?

Individuals spent these nights in a variety of lodging options as shown in Table 4 and figure 4. 38.8% of visitors were staying in either a hotel or motel, 15.9% stayed at a resort, and 5.5% stayed at a Bed and Breakfast establishment. 34% of visitors to the region reported that they stayed with friends and family members.

Table 4. Accommodation Used and Frequency (Q.4)

Type of Accommodation	1 Night	2-5 Nights	6-7 Nights	7+ Nights	Total
Hostel	0.5	0.4	0.2	0.8	1.9
Campground	0.4	1.6	0	1.1	3.1
Boat	0.9	2.7	0	0.2	3.8
Bed and Breakfast	1.1	4	0	0.4	5.5
Other	2.4	0.9	0.7	1.8	5.8
Resort	0.9	11.3	1.9	1.8	15.9
Home of Friend or Family Member	3.3	17.9	7.5	5.3	34.0
Hotel/Motel	8	22.3	2.3	6.2	38.8

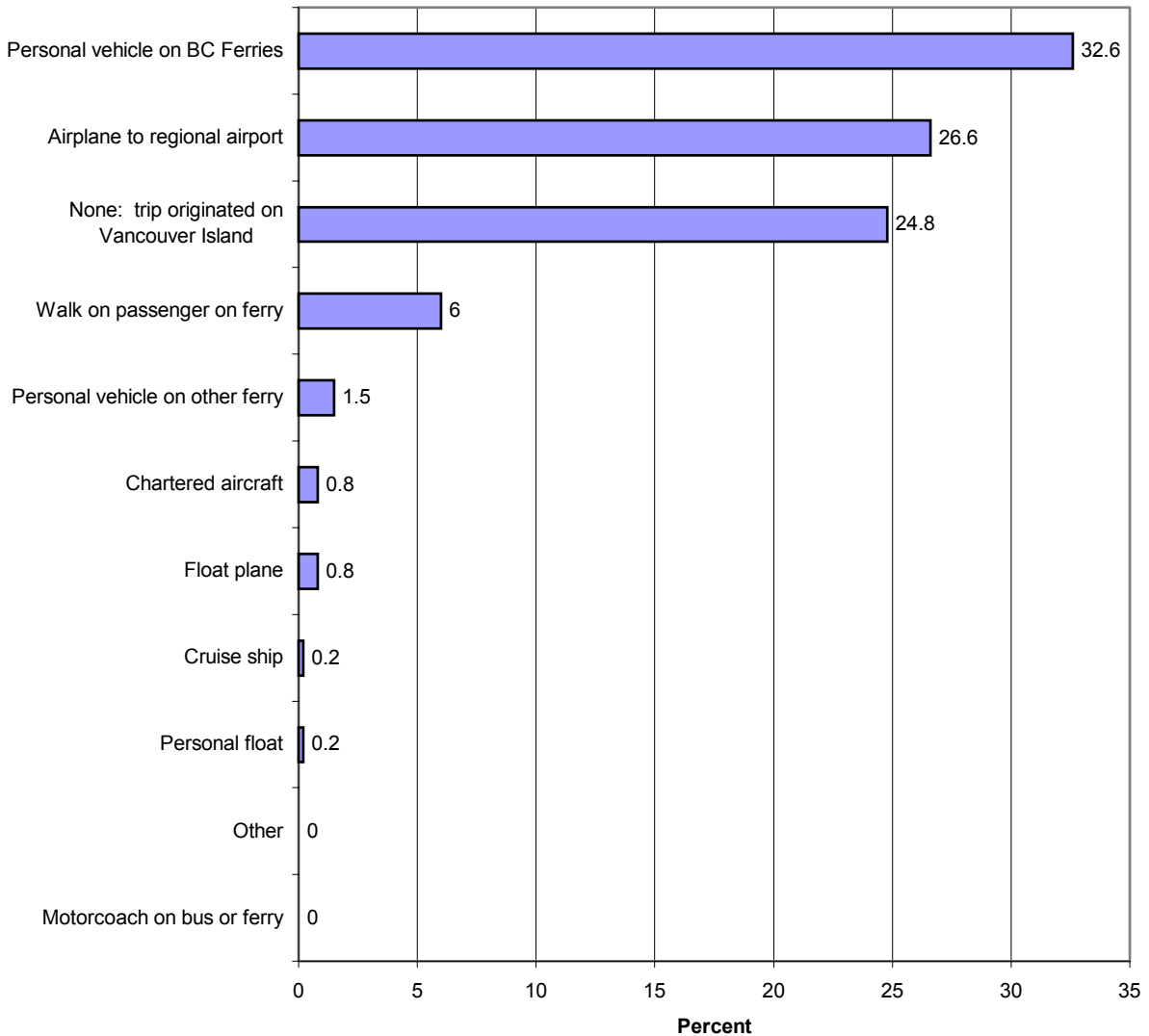
Figure 4. Type of Accommodation and Frequency of Use (Q.4)



v. How did they arrive at their destination?

The majority of visitors to the Vancouver Island Region traveled to and from the region via a ferry either with their personal vehicle (32.6% on B.C. ferries, 1.5% on other ferry), or as a walk on passenger (6%). An additional 26.6% of visitors took an airplane to a regional airport, and 1.6% flew via a chartered aircraft or floatplane.

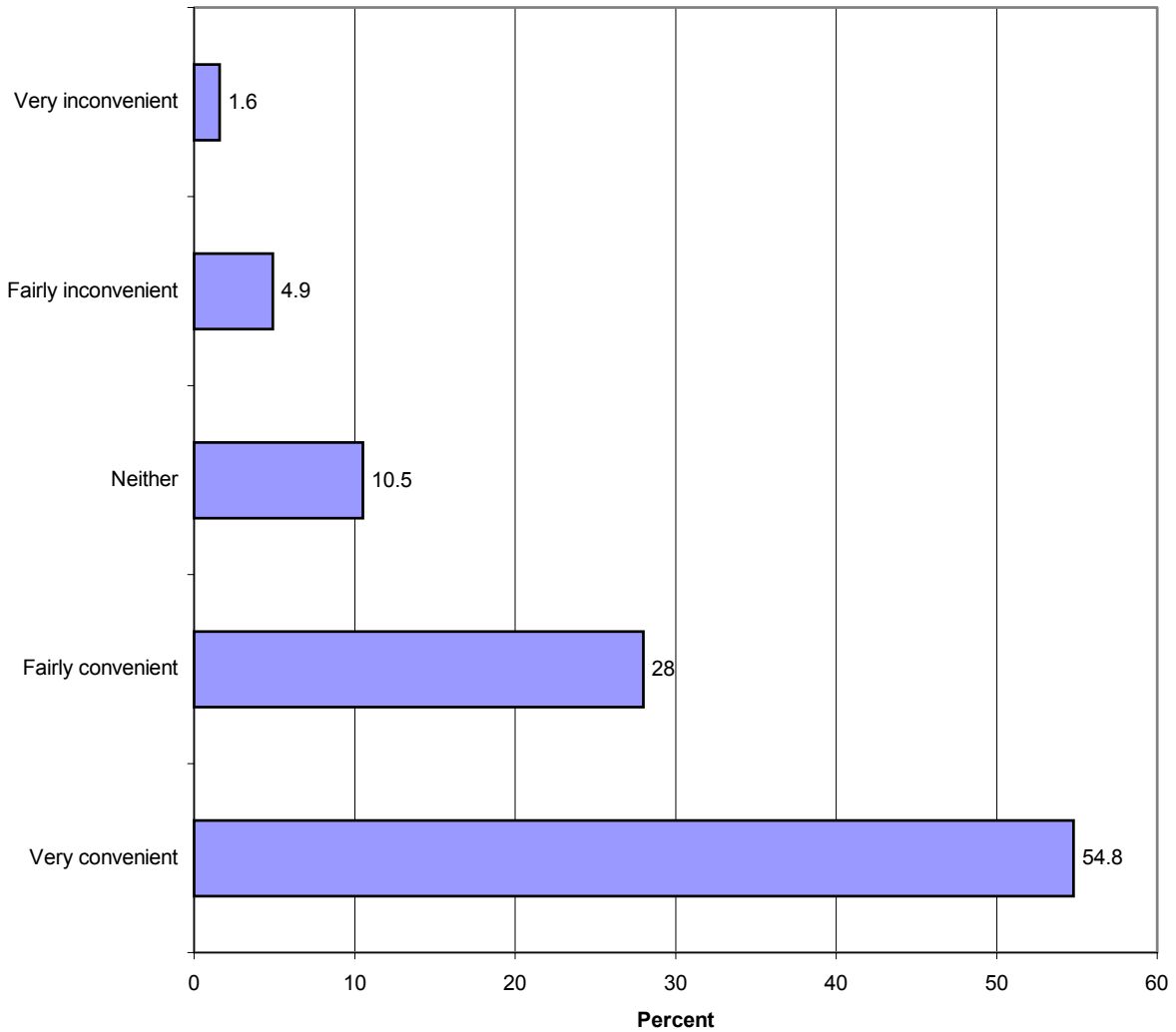
Figure 5. Form of Transportation Used to Travel to Vancouver Island (Q.5)



vi. How convenient was the mode of transportation used to travel to Vancouver Island?

One of the issues the Vancouver Island region often faces in trying to attract visitors to the region is transportation. Visitors were asked to rate how convenient they felt it was for them to travel to Vancouver Island. 82.8% reported that it was convenient to travel to the region, while 6.5% reported that it was inconvenient.

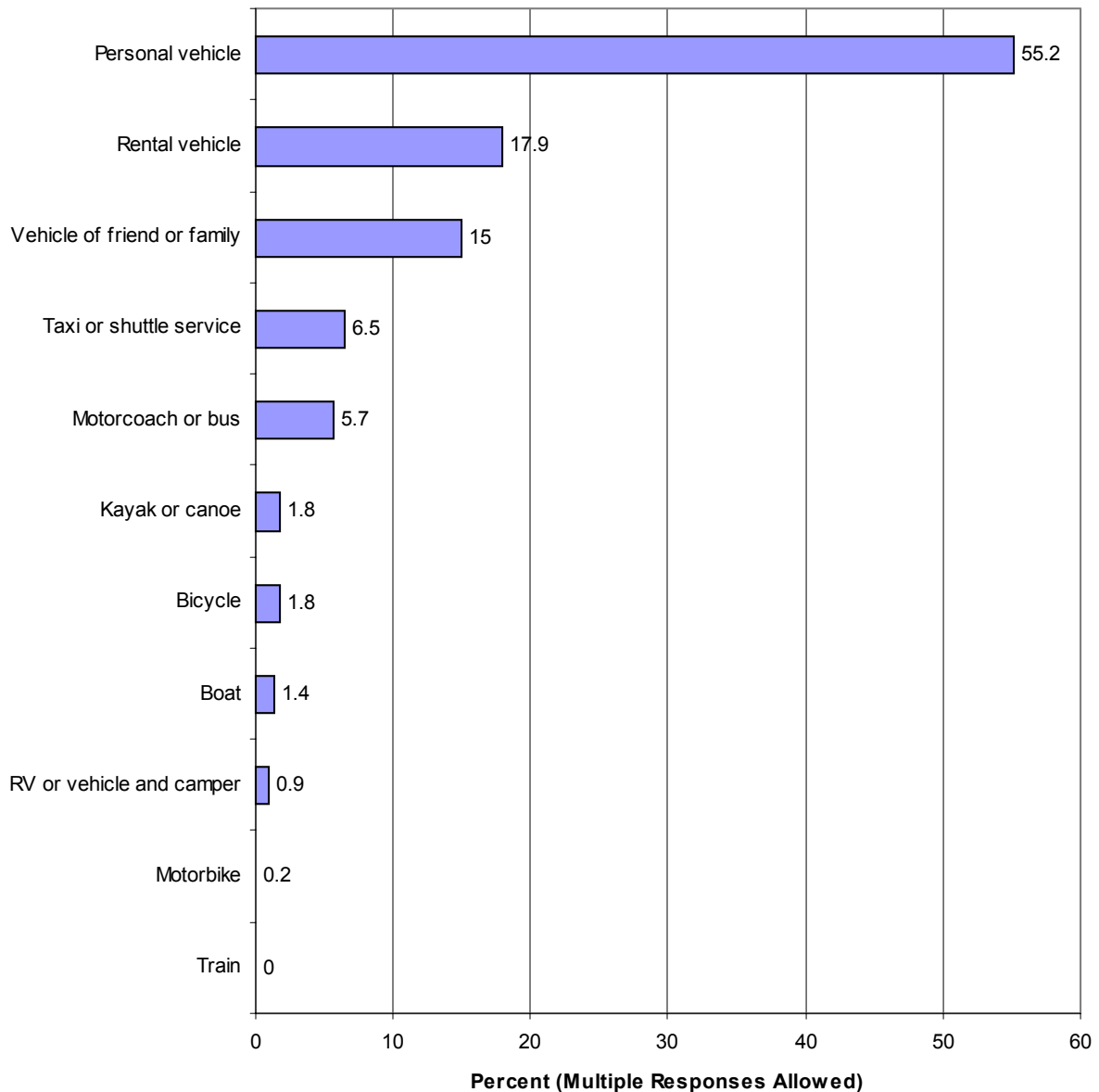
Figure 6. Convenience to Travel to Vancouver Island (Q.6)



vii. What mode of transportation did the visitor use while on Vancouver Island?

While in the region, visitors reported using a variety of forms of transportation to move around. 55.2% used their personal vehicle, 17.9% used a rental vehicle and 15% moved around in the vehicle of a friend or family member. 6.5% used a taxi or shuttle service, and 5.7% used a motor coach or bus during their visit. A number of other forms of personal transportation were used as shown in figure 7.

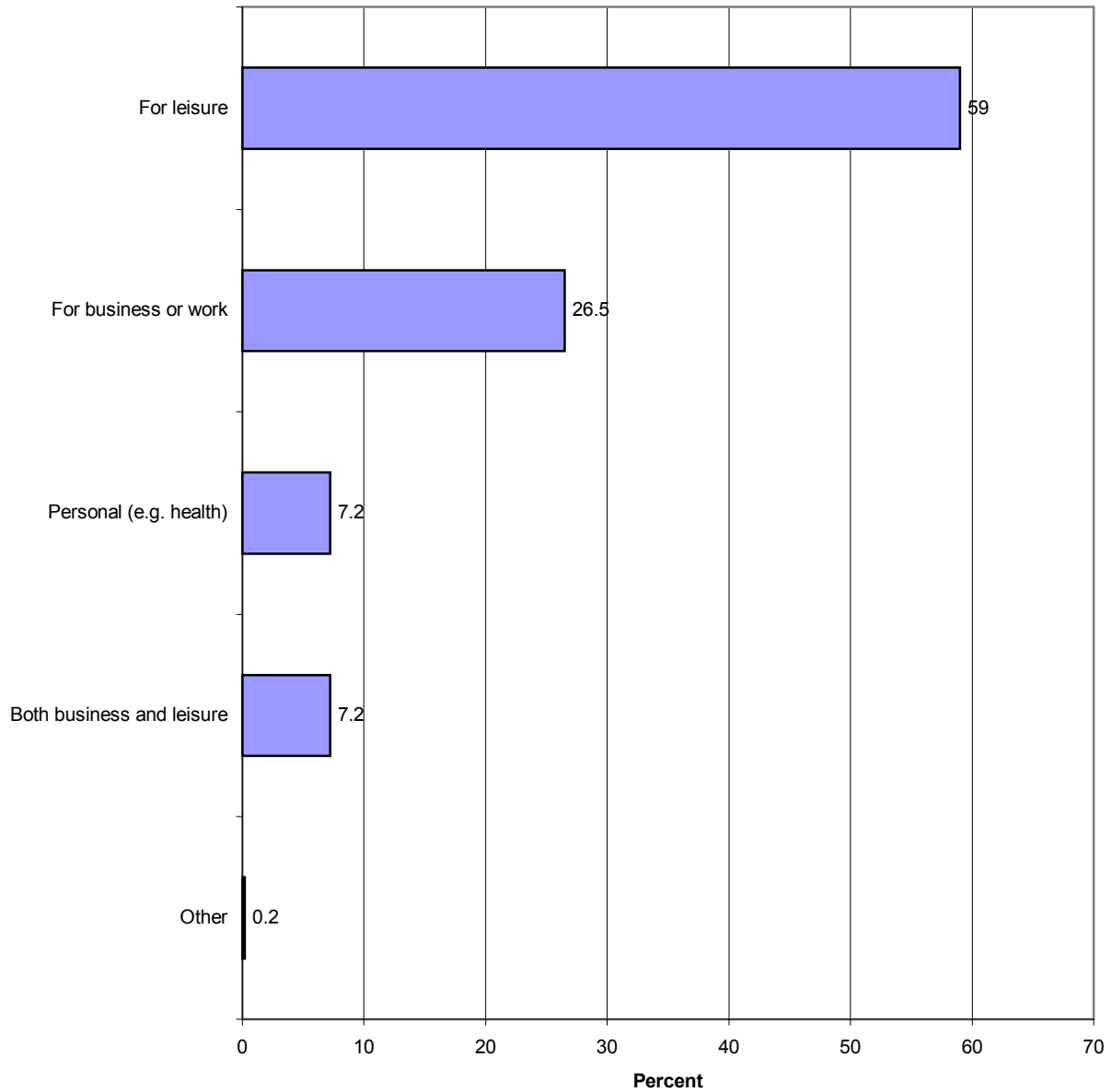
Figure 7. Transportation Used While on Vancouver Island (Q.7)



viii. What was the purpose of the visitor's trip?

Visitors to the Vancouver Island region were here for a mix of purposes. 59% of visitors were traveling for leisure while 26.5% were traveling for business or work. 7.2% were combining business/work and leisure travel, and 7.2% were traveling for personal reasons.

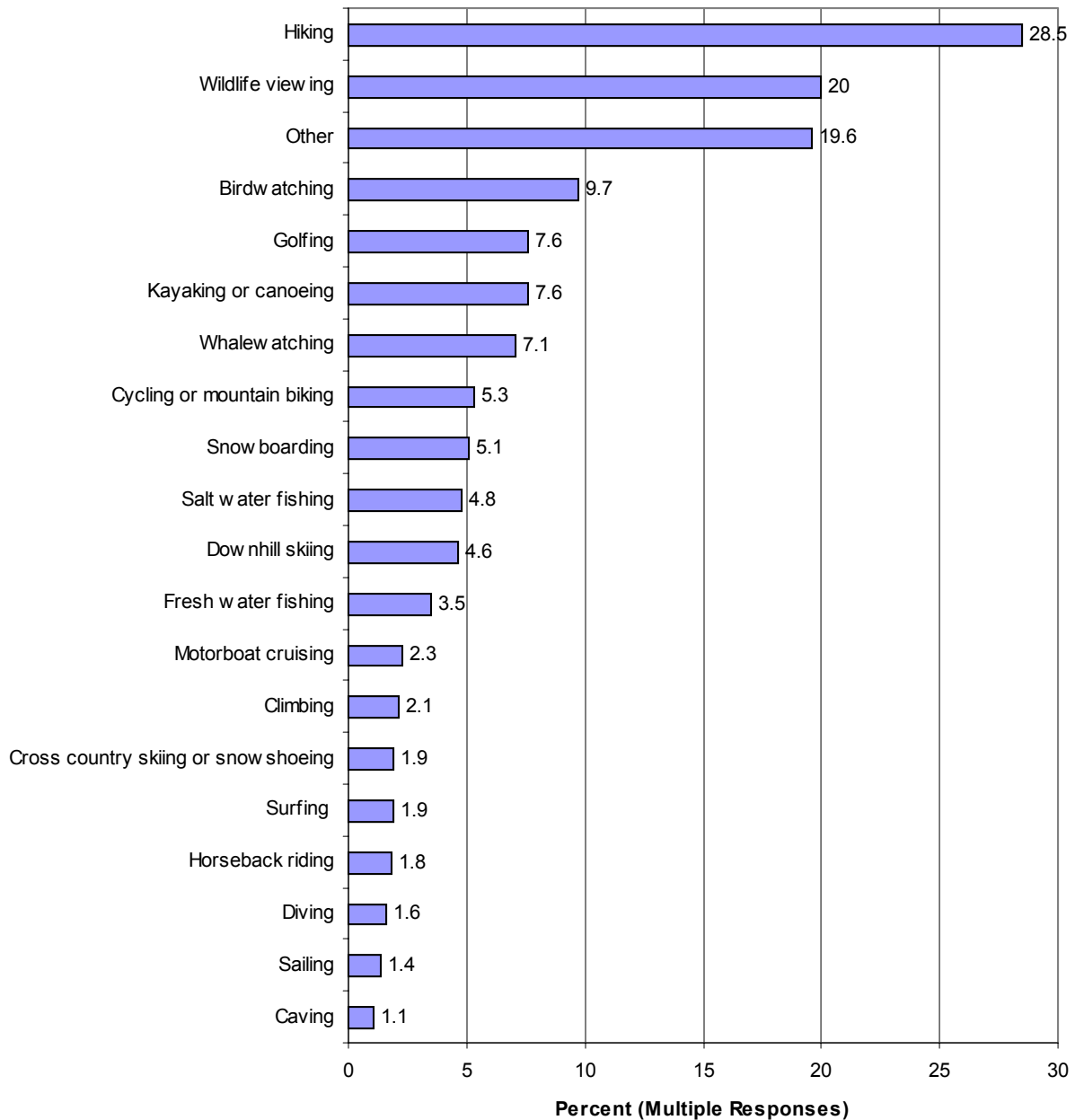
Figure 8. Main Purpose of Trip (Q.8)



ix. What outdoor recreation activities did they participate in during their visit?

Visitors were asked a series of questions about the activities that they undertook while visiting the Vancouver Island region. Outdoor recreation and adventure activities, one of the regions primary attractions, were grouped together and individuals were asked to indicate which of the activities they had participated in during their trip. Responses for this question are shown in Figure 9. In the fall season, visitors participate in a range of outdoor activities with the most popular being hiking (28.5%), wildlife viewing (20%), birding (9.7%), golfing (7.6%), kayaking or canoeing (7.6%), and whale watching (7.1%).

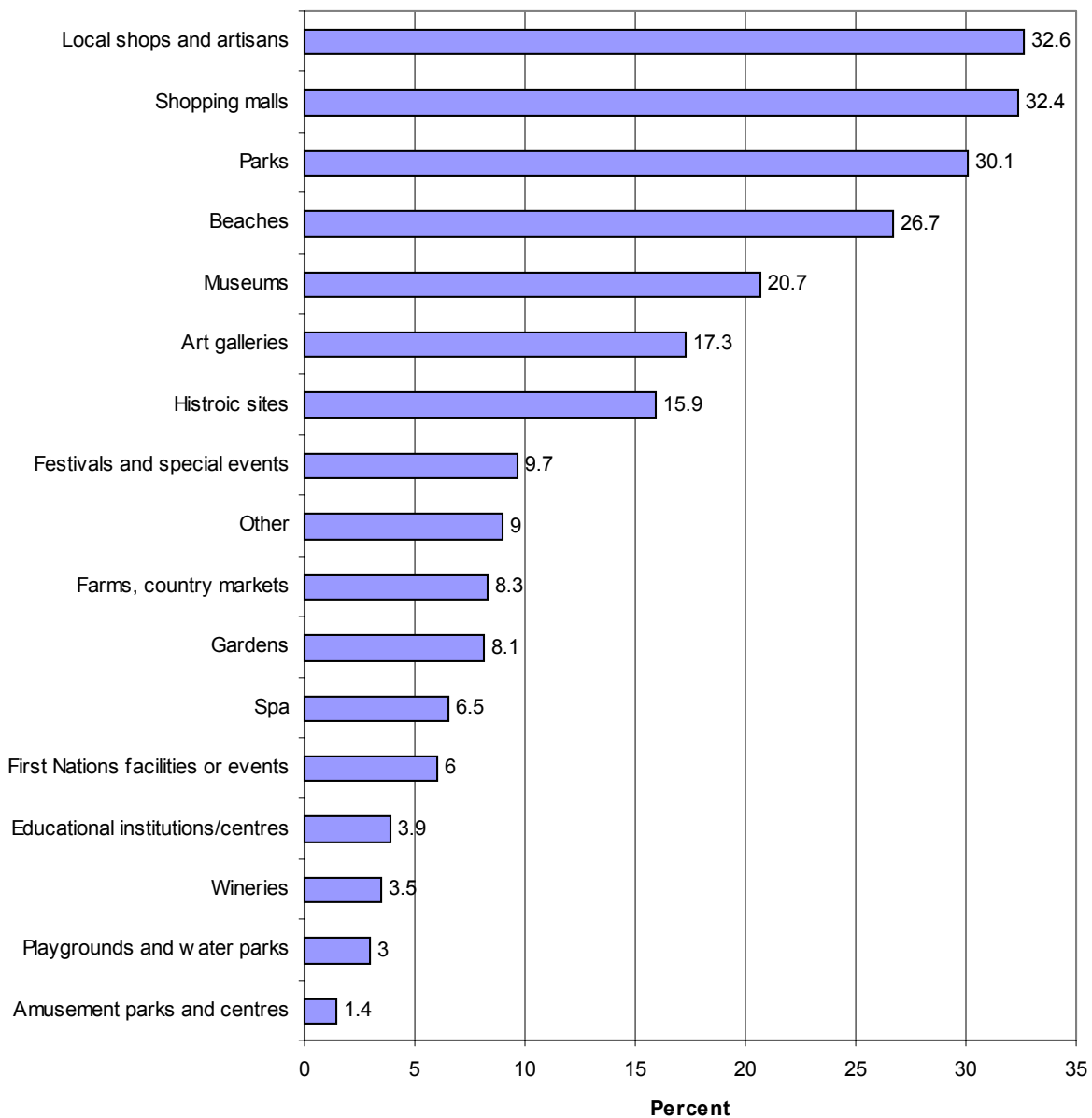
Figure 9. Participation in Outdoor Recreation Activities (Q.9)



x. What attractions did they visit during their trip?

Visitors were also asked about what attractions they had fit into their visit. Fall visitors to the region as shown in Figure 10 frequented a range of attractions. The most popular attractions were local shops and artisans (32.6%), shopping malls (32.4%), parks (30.1%), beaches (26.7%), museums (20.7%), art galleries (17.3%), historic sites (15.9%), and festivals and special events (9.7%).

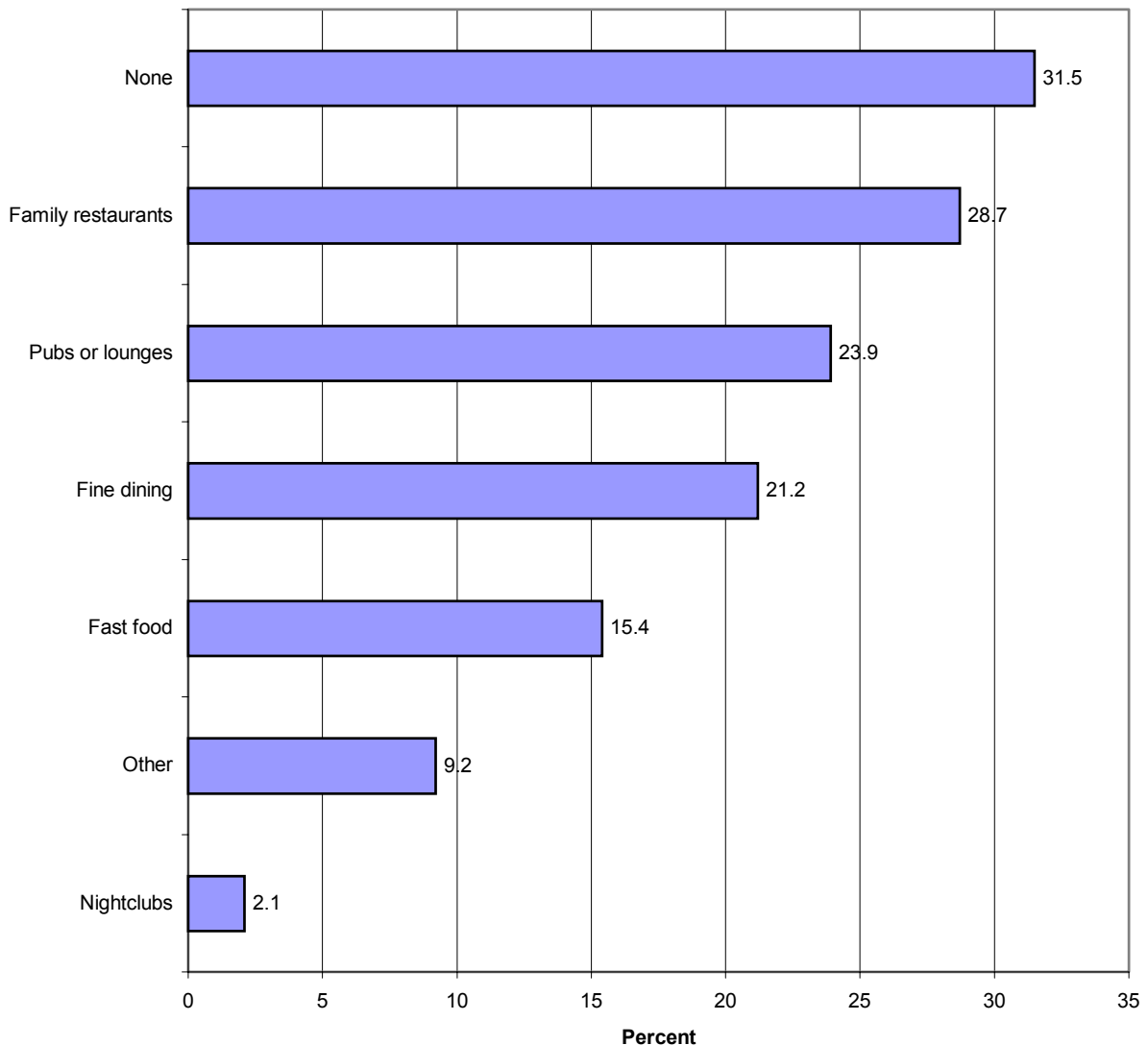
Figure 10. Tourism Attractions Visited (Q.10)



xi. What type of food and beverage establishments did visitors use on their trip?

Visitors were asked about which food and beverage establishments they used while on their trip to the Vancouver Island region. Figure 11 shows the range of establishments used by fall visitors to the island. 31% of visitors to the region reported that they did not use any of the commercial establishments listed and that they either cooked or ate at the home of a friend or family member. Of those who visited a commercial food and beverage establishment, 28.7% ate at a family restaurant, 23.7% visited pubs or lounges, 21.2% ate at a fine dining establishment, and 15.4% ate at a fast food operation.

Figure 11. Food and Beverage Establishments Used (Q.11)

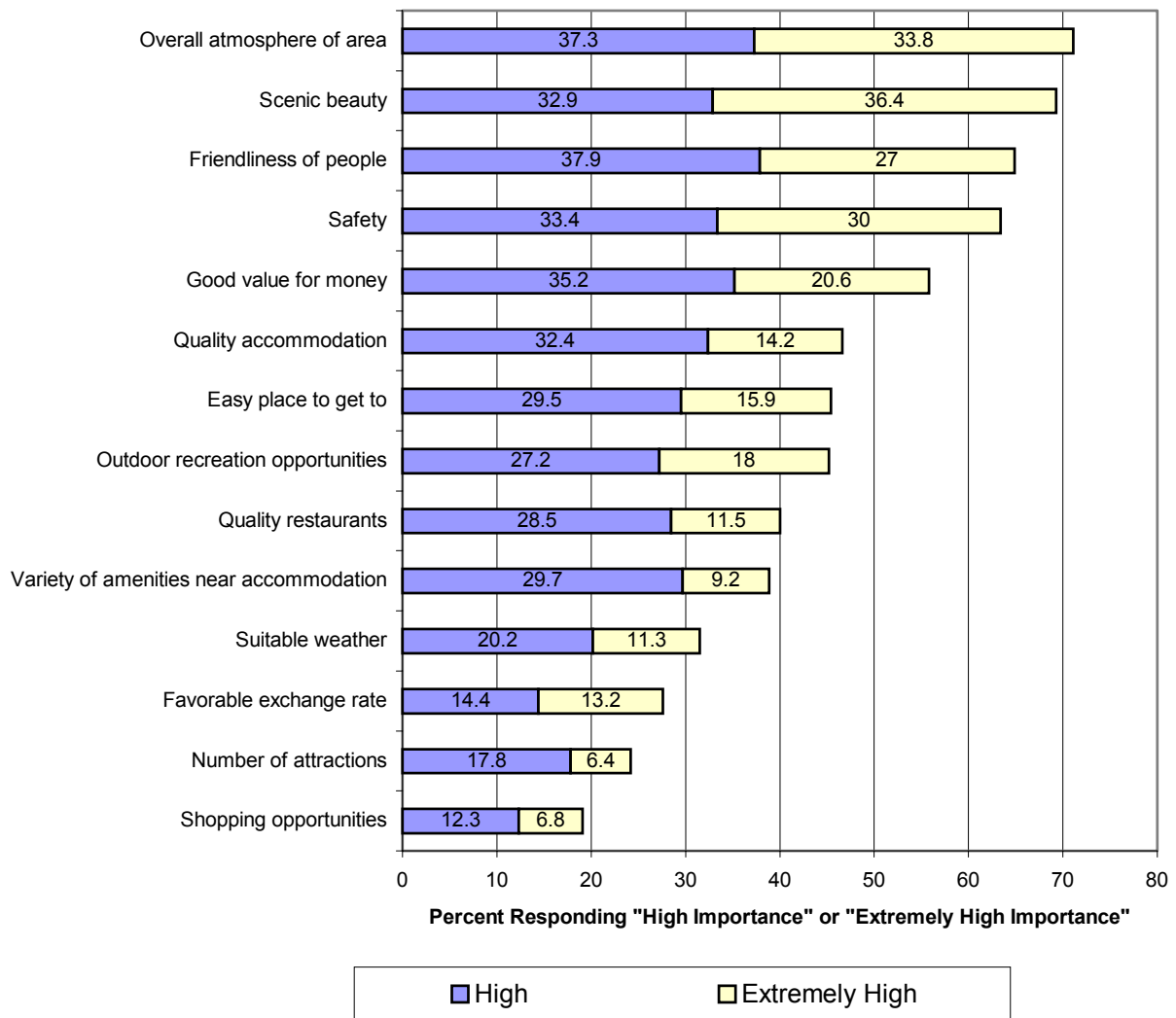


b.) Trip Planning:

i) What factors did visitors consider before taking their trip?

The next series of questions asked visitors about how they planned their trip to the island region. Figure 12 shows the features that visitors considered as important when planning their visit to the region. The features that were considered most important to fall visitors were overall atmosphere of the area (71.1%), Scenic beauty (69.3%), friendliness of people (64.9%), safety (63.4%), and good value for money (55.8%), quality accommodation (46.6%), ease of access (45.4%), and opportunities for outdoor recreation (45.2%).

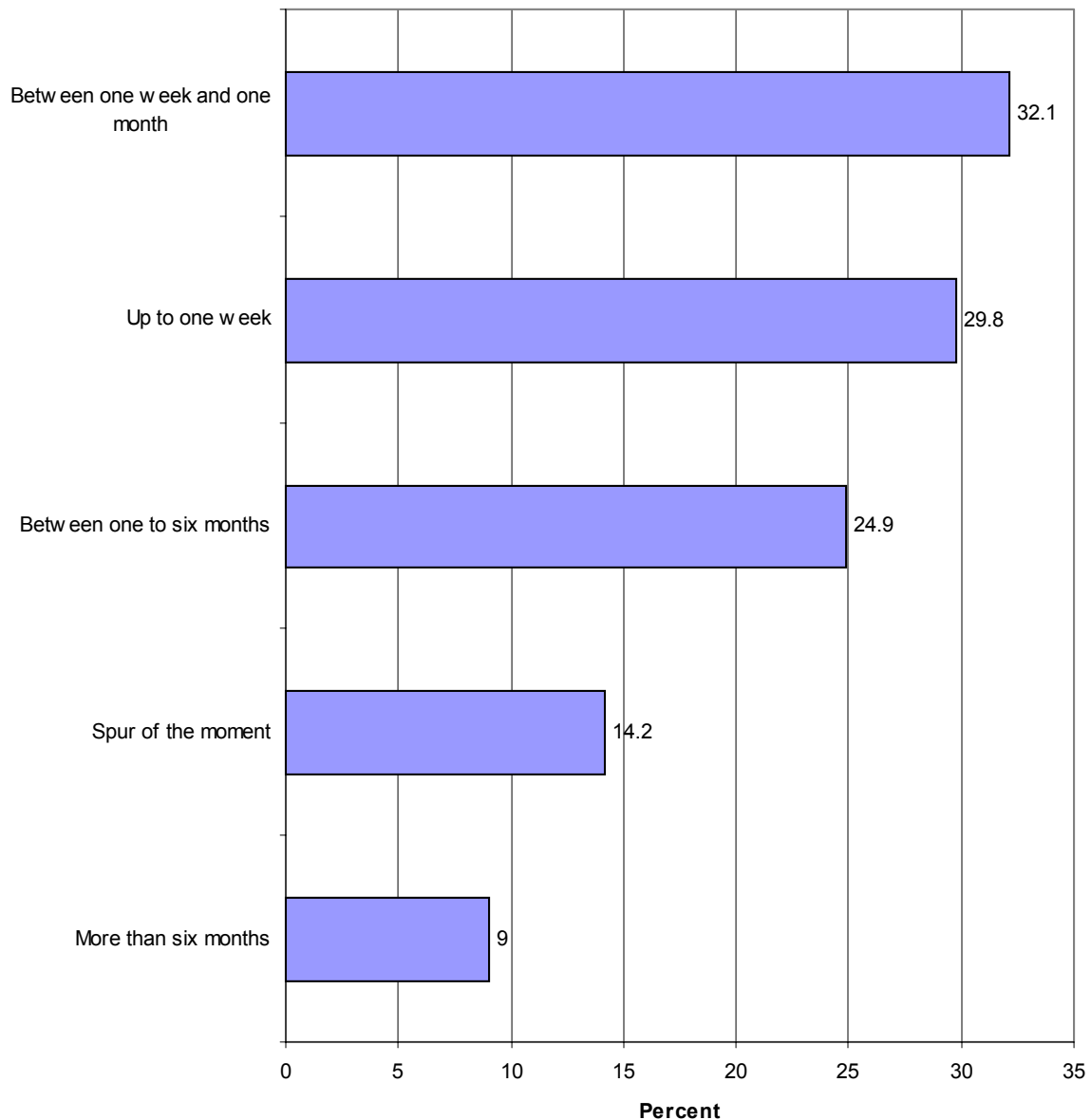
Figure 12. Features Considered When Planning This Visit (Q.12)



ii) When did they plan their visit?

Fall visitors to the island region reported that they planned their trip relatively recently as shown in Figure 14. 32.1% of fall visitors planned their trip between one week and a month, 29.8% planned the trip up to one week in advance and a further 14.2% planned their trip on the spur of the moment. 24.9% of fall visitors planned their trip between one to six months prior to visiting and the remaining 9% planned their trip more than 6 months in advance.

Figure 14. Advance Planning of Trip (Q.14)



iii.) How many times have visitors previously taken a trip to the Island or region where they were intercepted?

Visitors were asked about how many times they had previously visited the Vancouver Island region, and the region they were taking the survey in. Figures 15 and 16 show the visitation patterns of fall visitors to the island region. 20.2% of fall visitors were on their first visit to the region, while 41.3% reported that they have made between 1 to 5 previous visits. The remaining fall visitors are frequent visitors where 16.5% reported visiting between 6-10 times, and 21.9% have visited more than 10 times.

When asked how many times they have visited the region they were doing the study in, a similar pattern emerged. 28.3% were visiting the region they were intercepted in for the first time, while 42.4% had made between 1 to 5 previous visits. An additional 11.6% had visited the region between 6-10 times previously, and the remaining 17.6% of visitors had visited more than 10 times.

Figure 15. Previous Visits to Vancouver Island (Q15A)

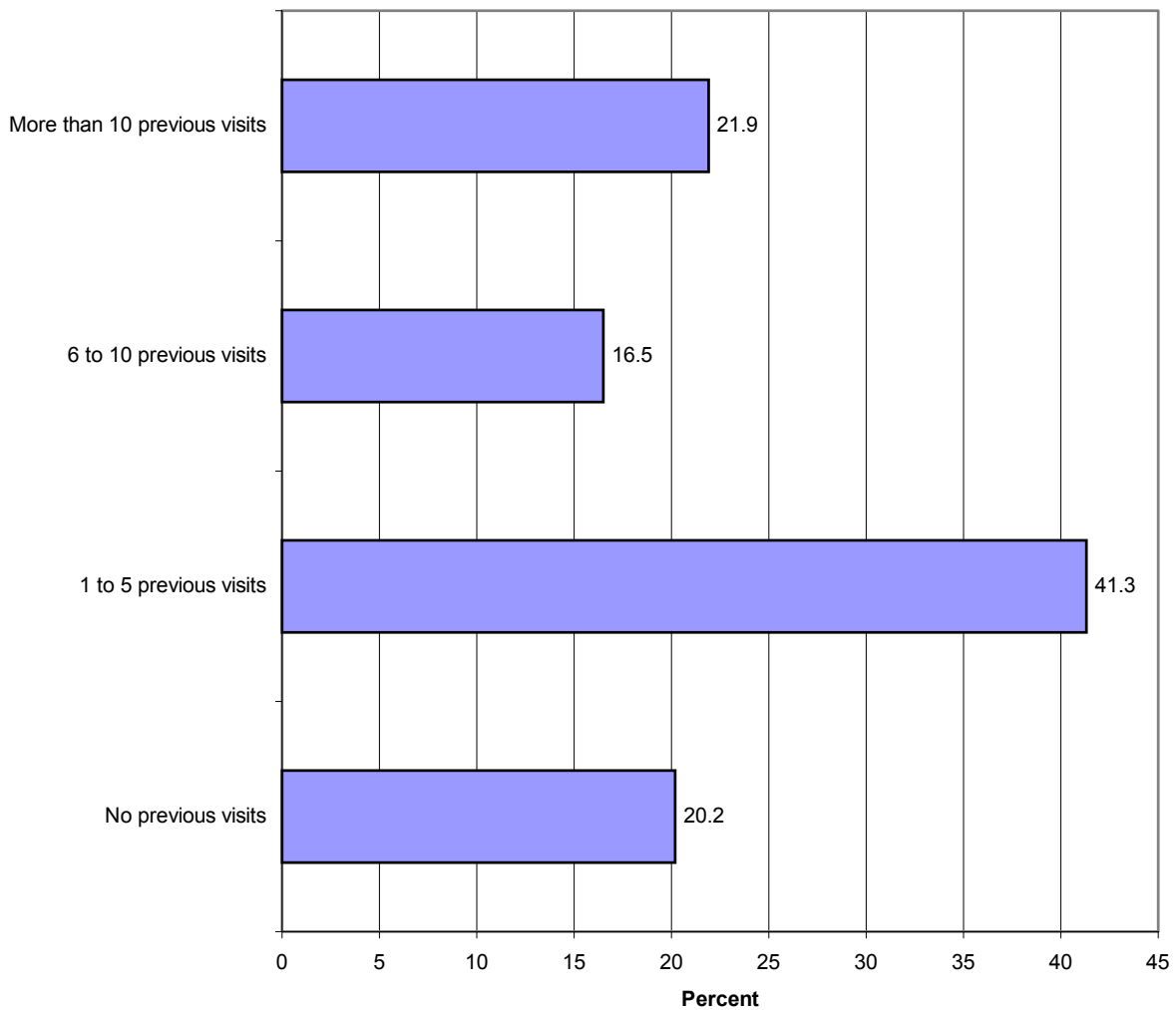
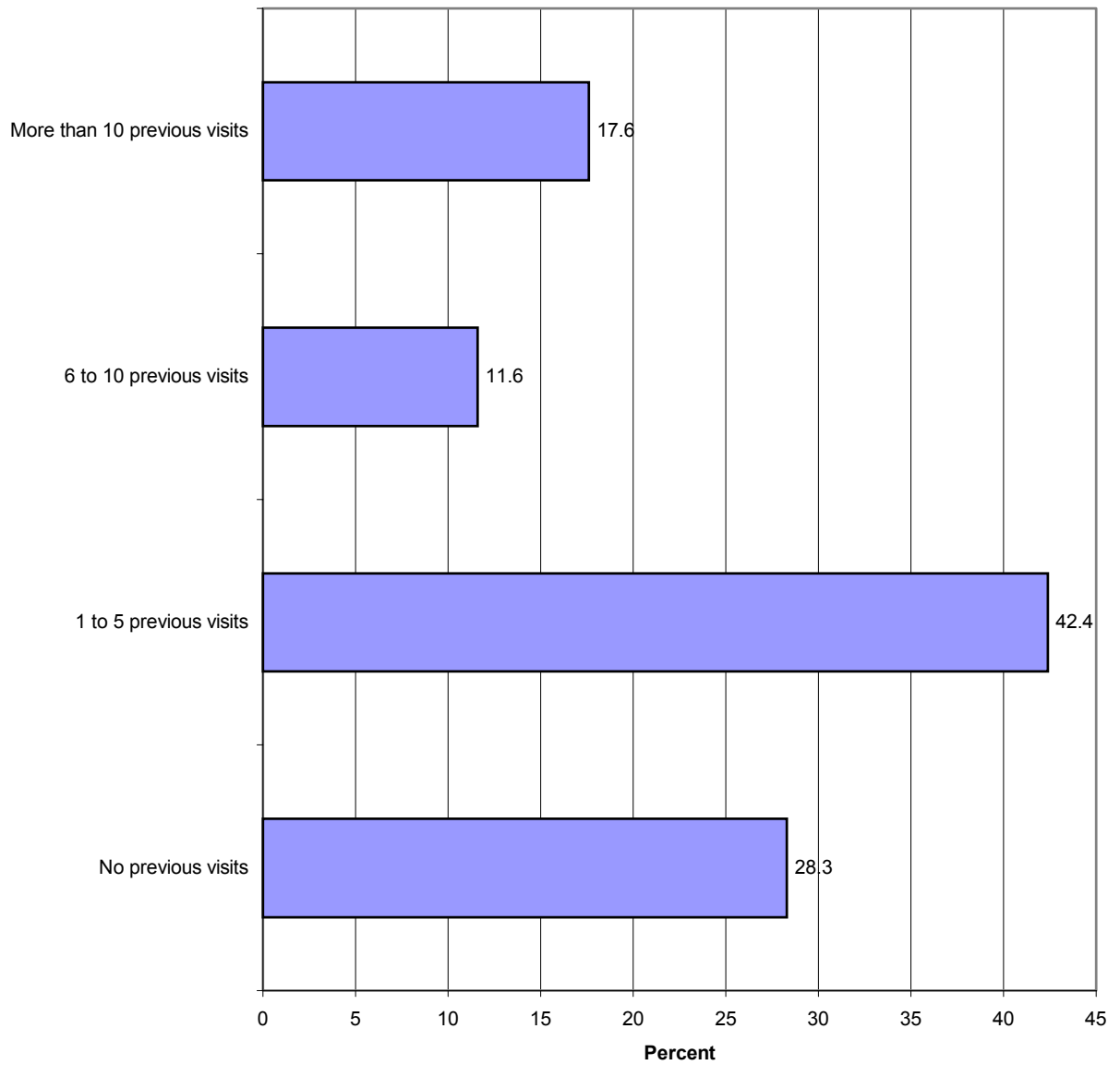


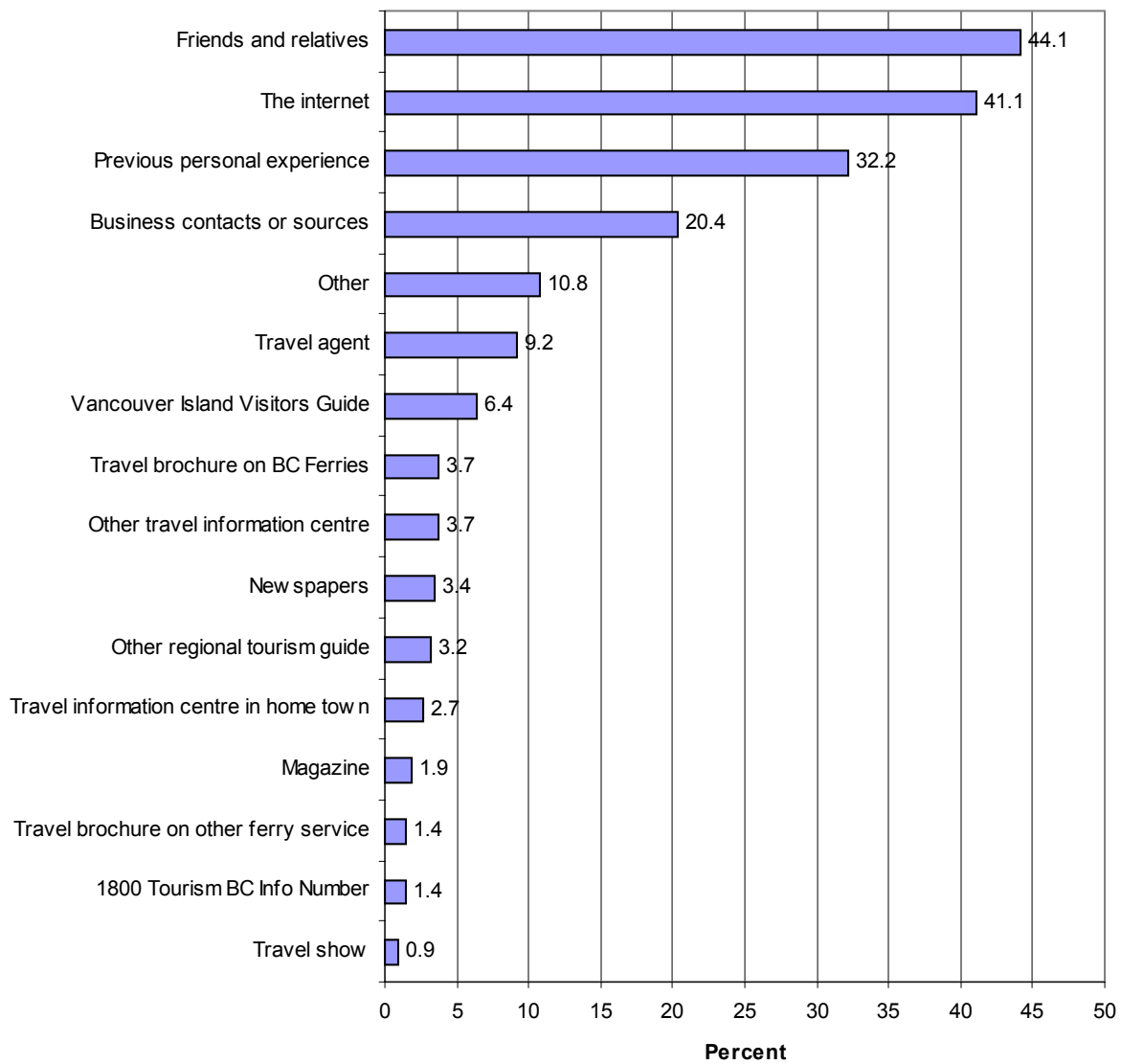
Figure 16. Previous Visits to Place Where Survey Conducted (Q15.B)



iv.) What sources of information did visitors use to plan their trip?

Visitors were asked to provide which sources of information they had used to plan their trip. Figure 17 shows that while fall visitors used a variety of sources, there is a heavy reliance on personal contacts and previous visits. 44.1% of fall visitors used their friends and family members as sources of information for trip planning, and an additional 20.4% relied on business contacts. The Internet provided information for 41.1% of fall visitors whereas travel agents were only used by 3.2% of the visiting population. As the island region is popular among repeat visitors, it is not surprising that 32.2% of fall visitors simply relied on previous personal experience. Of the print materials available, 6.4% of fall visitors used the Vancouver Island Vacation Guide, 3.7% gathered information from the travel brochure on BC Ferries, and a similar number collected from a travel information center.

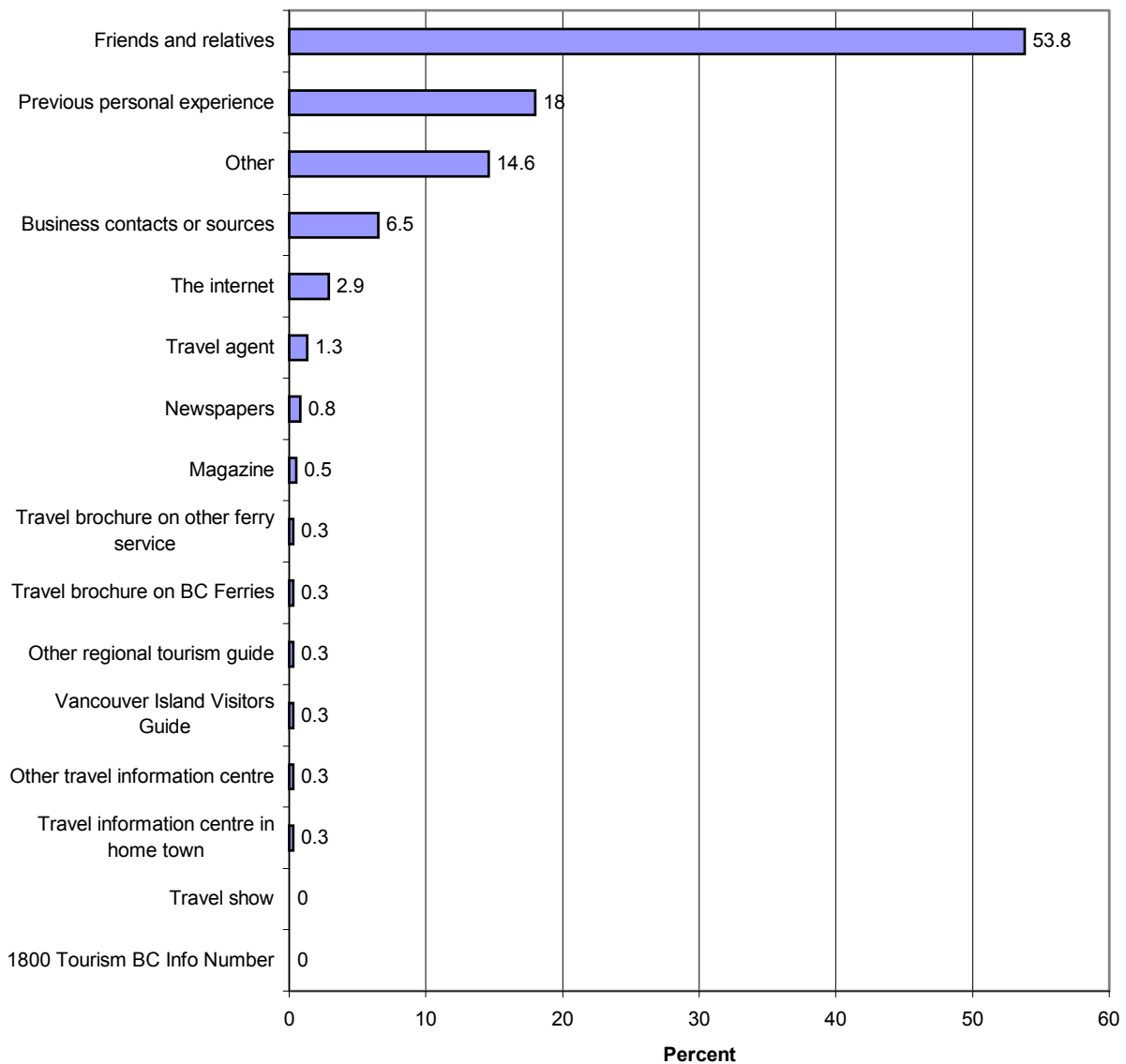
Figure 17. Source of Information Used For Trip Planning (Q.16)



v.) How did visitors first become aware of the region?

Visitors were also asked how they first learned about the Vancouver Island region. As a number of visitors were from the Island, responses for this question were lower. Of responses received, Figure 18 shows how individuals first became aware of the Vancouver Island region as a potential travel destination. Again, the importance of friends and family are illustrated with 58.8% of visitors reporting that is where they first learned about the region. Another 18% reported that they knew about the region from previous travel experience, and 6.5% used business contacts or sources. While the Internet is useful as a travel-planning tool, only 2.9% of visitors first learned about the Island region by Internet.

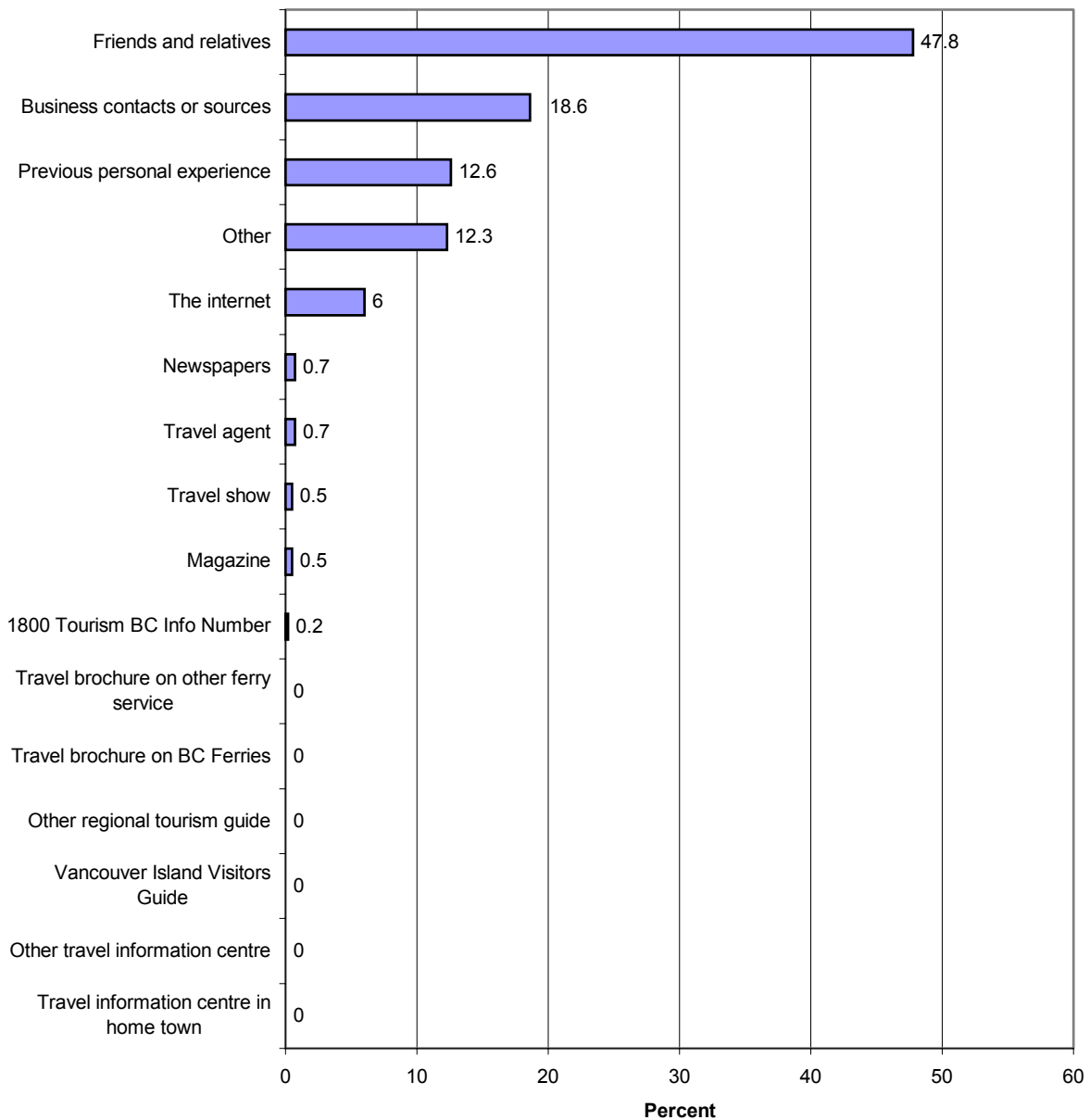
Figure 18. How First Learned About Vancouver Island (Q.17)



vi.) What source of information most influenced visitors to travel?

Similarly, when asked what most influenced them to take their trip, 47.8% of respondents reported friends and family members, 18.6% reported business contacts, and 12.6% reported previous travel experience.

Figure 19. Information Source That Most Influenced Decision to Visit Vancouver Island (Q.18)

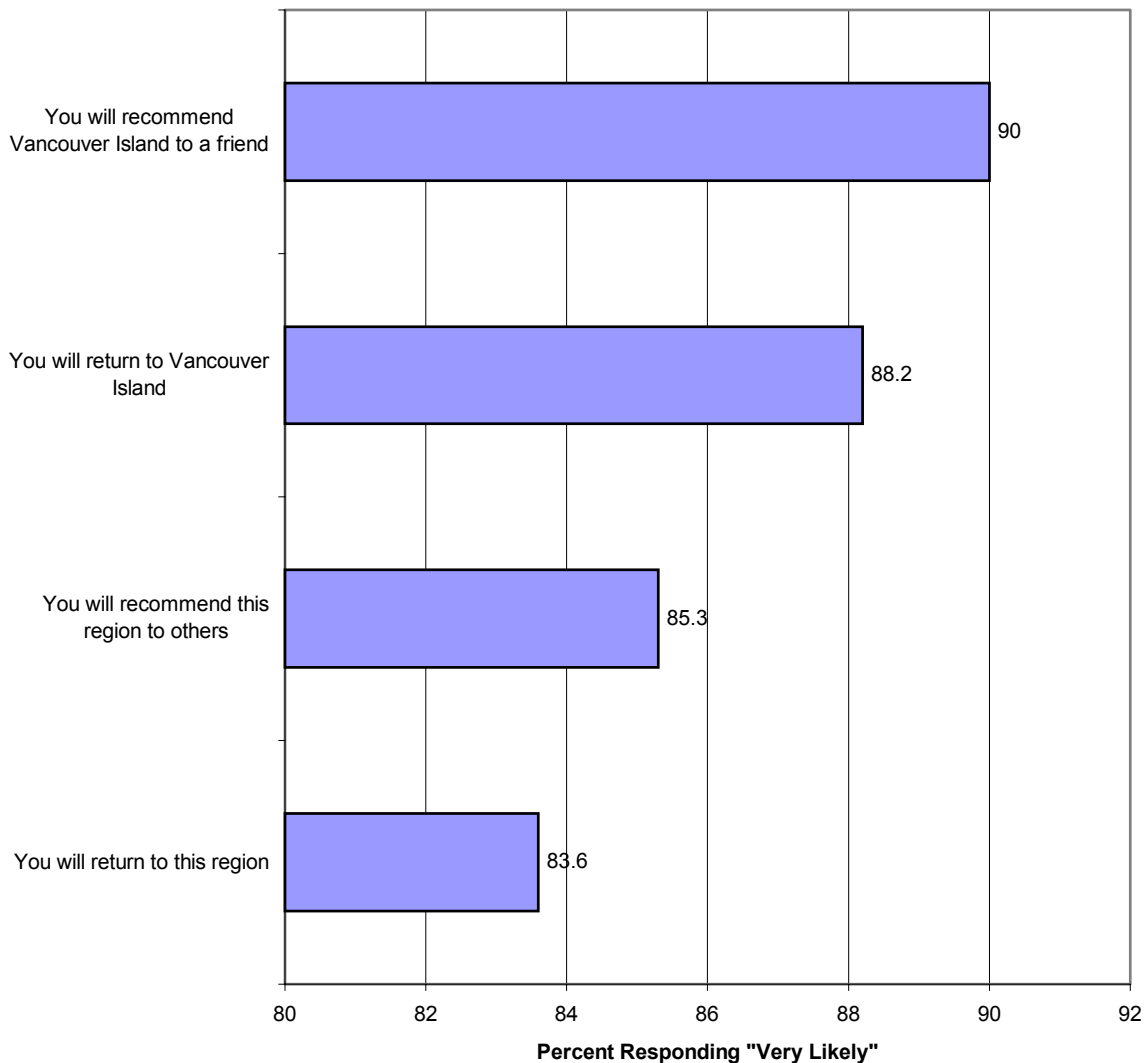


C.) Evaluation of the travel experience:

i.) Will visitors recommend the region to others?

Visitors were asked to indicate how satisfied they were with their overall travel experience. As shown in Figure 20, 90% of fall visitors responded that they will recommend the Vancouver Island region to someone else, and 88.2% indicated they would return to the Vancouver Island region. When asked about the region they were being intercepted in, 85.3% reported that they would recommend the region to someone else, and 83.6% indicated they planned on returning to the same region for a future visit.

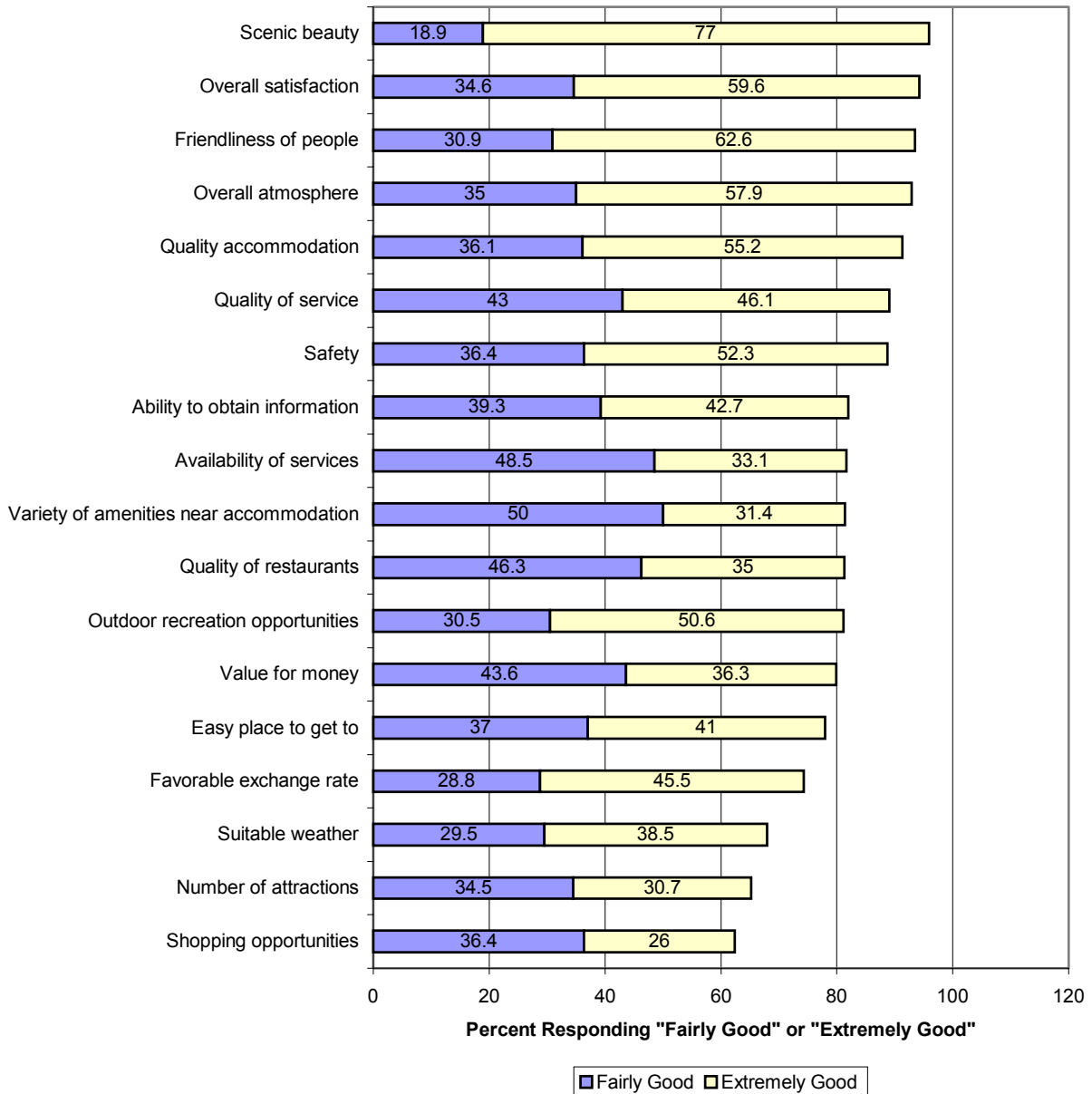
Figure 20. Overall Attitude Regarding Experience (Q.19)



ii.) How did visitors evaluate different aspects of their trip?

Fall visitors were asked to evaluate their trip on a range of items as shown in Figure 21. 94.2% of fall visitors rated their overall satisfaction as good or extremely good. Scenic beauty is what motivated individuals to consider traveling to the region, and it was also evaluated positively by 95.9% of visitors. Other items evaluated positively include friendliness of people (93.5%), overall atmosphere (93.5%), quality of accommodation (91.3%), quality of service (89.1%), safety (88.7%), ability to obtain information (82%), availability of services (81.6), and variety of amenities near accommodation (81.4).

Figure 21. Evaluation of Different Aspects of Trip (Q.20)

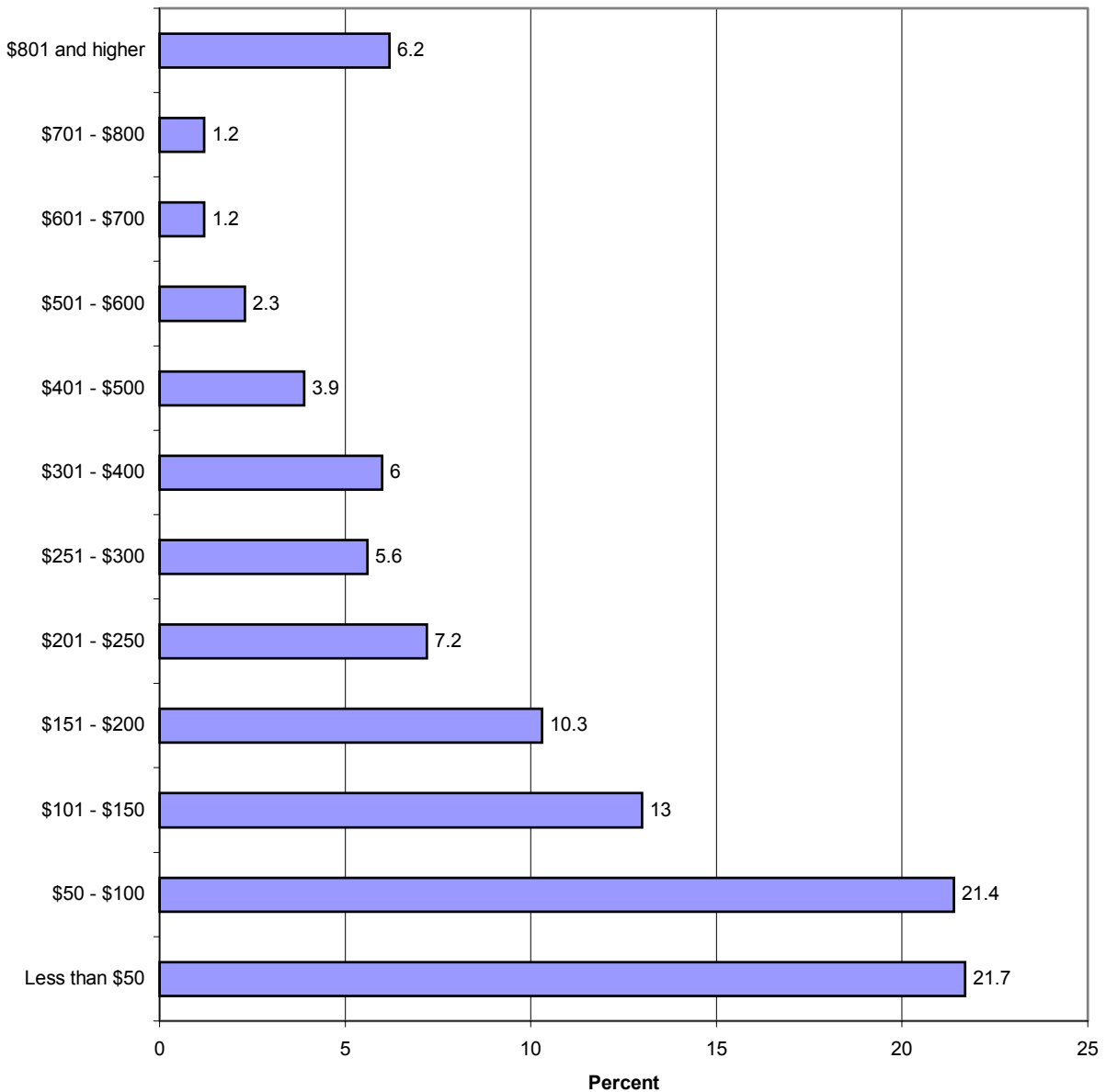


D.) Visitor profile:

i.) How much did visitors spend on their trip?

Visitors were asked about how much their group spent the day prior to being surveyed, including all accommodations, transportation, food and beverage, entertainment etc. Figure 13 shows the range of spending by fall visitors to the island region. 43.1% of visiting groups spent below \$100 the day prior, 23.3% spent between \$101 and \$200, 12.8% spent between \$201 and \$300. 8.6% of the visitors spent between \$301 and \$800 the previous day and 6.2% spent \$801 and above.

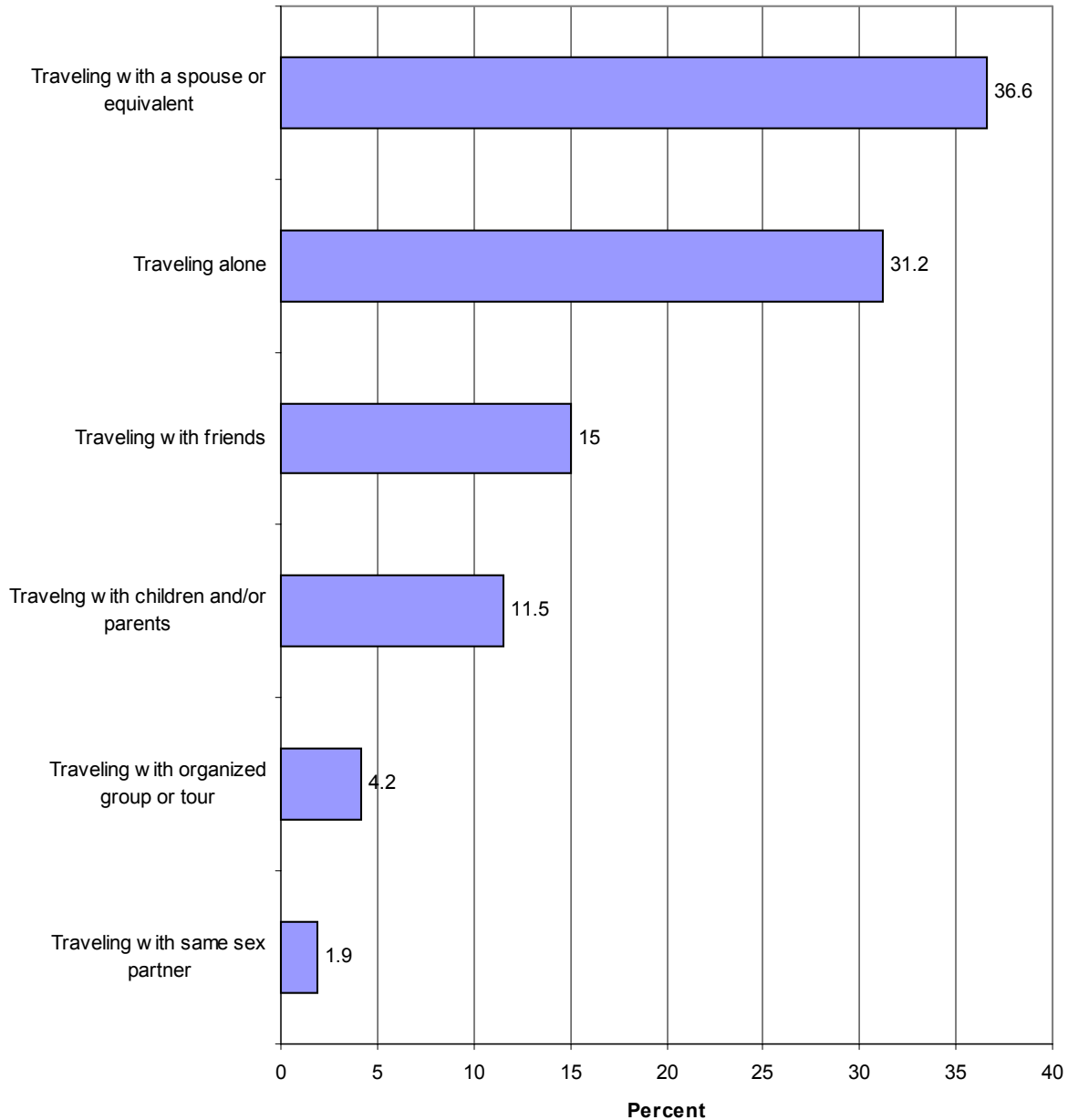
Figure 13. Group Spending "Yesterday" (Q.13)



ii.) What was the composition of the visitor groups?

Respondents were asked to indicate the composition of their group. Figure 22 shows that 36.6% of fall visitors were traveling with a spouse or equivalent, 31.2% were traveling alone, 15% were traveling with friends, and 11.5% were traveling with children or parents. Only 4.2% were traveling with an organized tour or group, and 1.9% were traveling with a same sex partner.

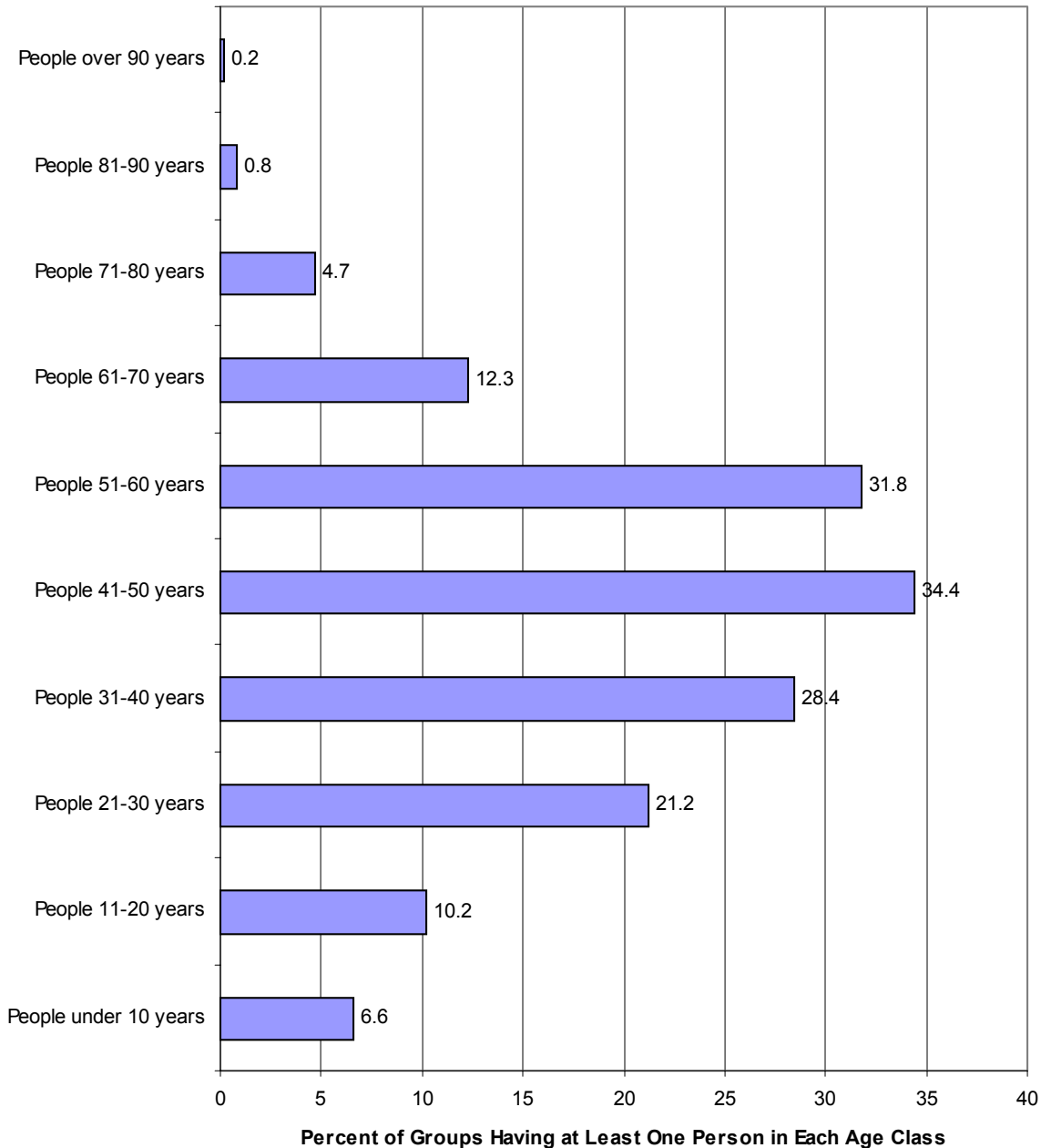
Figure 22. Type of Travelling Group (Q.24)



iii.) What was the age composition of the visiting groups?

The age of visitors in the fall study are shown in figure 23. Respondents were asked to record the number of people in their group that fell into each age category. 43.4% of visiting groups had someone between the ages of 41-50 years. 49.8% of groups had someone 51 or older in their group and 57.2% of groups had individuals 40 or younger in their group.

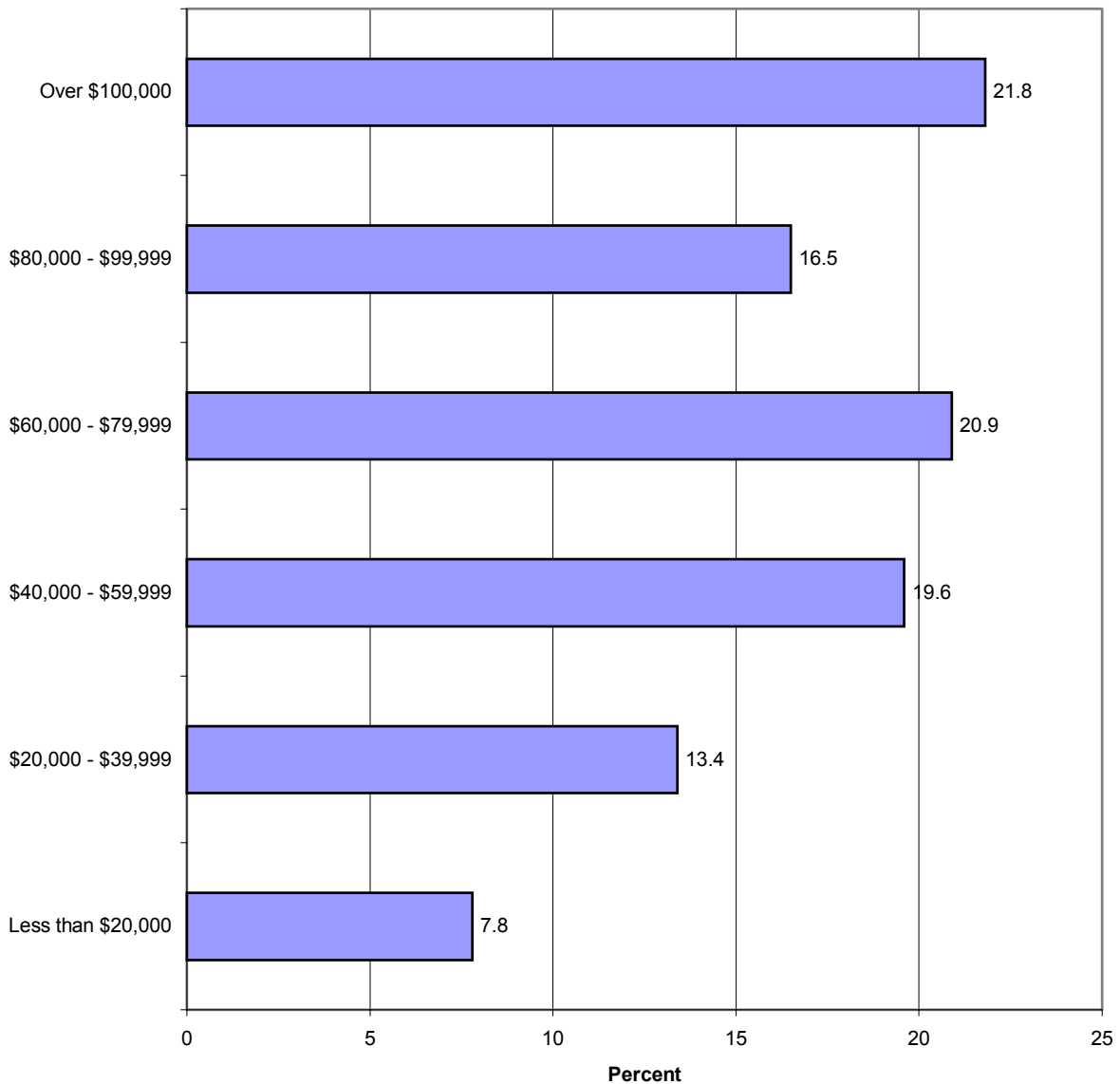
Figure 23. Age Composition of Visitors (Q.25)



iv.) What was the income level of visitors?

Fall visitors were asked to provide their annual household income as shown in Figure 24. 21.8% of fall visitors reported an annual household income of over \$100,000, while 21.2% reported earning \$39,999 or less. The remaining fall visitors reported annual household income to range between \$40,000 to \$59,999 (18.6%), \$60,000 to \$79,999 (20.9%), and \$80,000 to \$99,999 (16.5%).

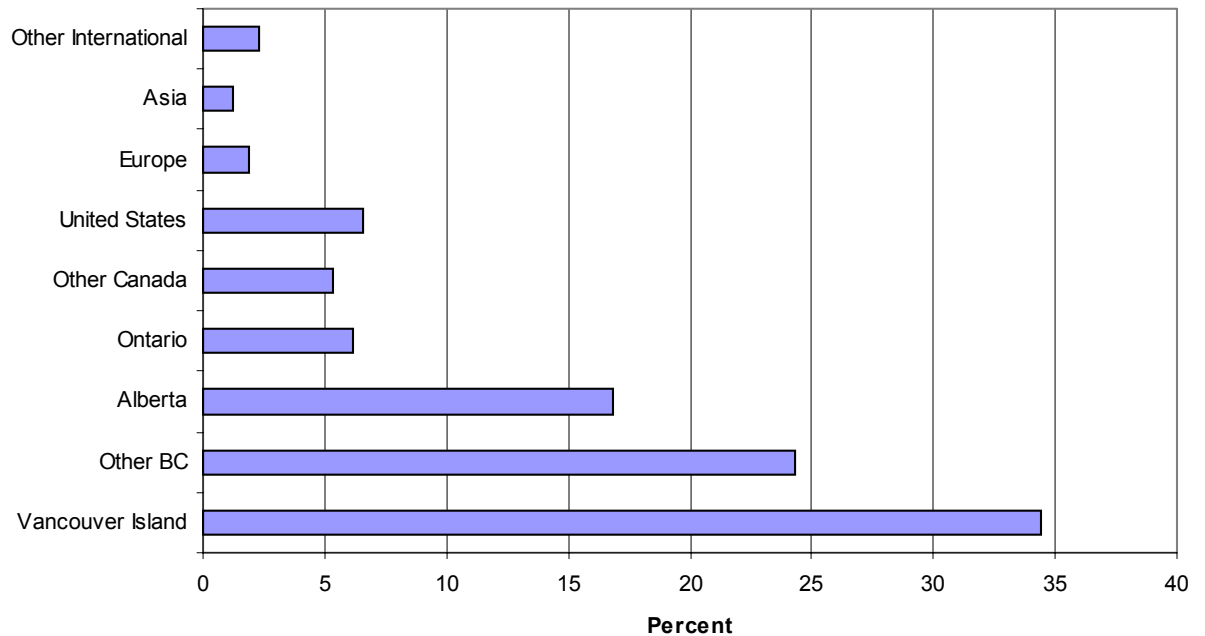
Figure 24. Household Income (Q.26)



v.) Where did the visitors come from?

Of the fall visitors 34% were traveling from other regions on Vancouver Island while 24% were arriving from other areas within the Province. The second largest market was from Alberta (16.5 %) with travel from other areas within Canada representing approximately 6% of the sample. The remainder of the sample (6%) was traveling from international markets.

Figure 25. Place of Residence (Q.27)



5.) Discussion:

The fall visitor surveys provide a good source of information on the tourism industry in the Vancouver Island region. The results will be discussed from a labour market perspective. Additional discussion on the marketing implications will be done with the Advisory Committee for the project and will be made available in condensed report for use by the industry.

Labour market implications of the fall visitor survey data:

The tourism labour market is driven by visitor demand. Where visitors demand outdoor recreation opportunities for example, a supply of tourism operators will emerge to provide opportunities. When business is good, these operators provide an array of employment opportunities in urban and rural communities. It is in this way, that the tourism industry has been growing and providing employment in the Vancouver Island labour market.

The fall visitor data collected in the Tourism Labour Market Research Project provides the first look at what the needs of visitors to the Island region are. This information has not been available to organizations involved in tourism in the past. Combined with the results from winter, spring and summer 2003, the information will support the growth and development of new and existing tourism products throughout Vancouver Island.

a.) What does the fall visitor data tell us about the tourism labour market on Vancouver Island?

Information on the visitors to Vancouver Island can tell us a number of things about the labour market in the region. The data presented in the findings section of this report indicate the following:

i.) Demand for a variety of tourism products exists in the fall season, throughout the entire Vancouver Island Region.

The fall and winter seasons represent "low season" for the tourism industry where fewer visitors travel, and many tourism operators close due to the decrease in demand. While this is true for the fall season in the Vancouver Island region, the fall visitor data does indicate that the visitor traffic that is arriving is participating in an array of activities. As shown in the findings section, fall visitors were engaged in all categories of outdoor recreation and had high visitation levels for the areas arts, culture and historic attractions.

ii.) Fall visitation is generating economic returns for tourism related businesses.

Visitors to any region have certain requirements. They need food, accommodation, transportation, entertainment and often information. The data from this study indicates how fall visitors are satisfying these needs. It also indicates the far-reaching effects of tourism in the Vancouver Island economy. For example, a large percentage of visitations in the fall season are coming to visit friends and relatives. While this market is spending less on accommodation and food services in commercial establishments, they appear to be purchasing groceries, shopping and engaging in activities that leave new dollars in the regions they visit.

It is important to note that visitor demand is impacting more than tourism businesses. A number of the attractions and activities that draw visitors to the Vancouver Island region are operated by not for profit and public sector organizations.

iii.) Demand for emerging sectors of the tourism industry is evident.

Tourism activity is based on human behavior, which is quite dynamic and follows trends. Those involved in providing tourism opportunities have to ensure they are responsive to the needs of visitors and provide the opportunities that are currently "in". The visitor data provided by this project supply evidence of emerging trends in tourism, and can be monitored to allow tourism organizations to respond and continue to attract visitors to the Vancouver Island region.

In the last decade, the Vancouver Island region has capitalized on the natural surroundings of the area, bringing visitors to experience an array of outdoor recreation activities in its rural areas. These activities are often a primary motivator to visit the Vancouver Island region. The nature-based tourism market is growing internationally, and has become very competitive. The fall visitor data indicates that a high percentage of visitors to the Vancouver Island Region are engaging in at least one outdoor recreation activity during their stay. It also shows that 7 of the top 10 outdoor recreation activities depend on the sustainability of the natural surroundings.

The fall visitor data also suggests evidence of a few other emerging tourism sectors. The attractions data indicates that "shopping tourism" is popular. Visitors are shopping at both local artisans and at shopping malls, helping to generate both spending and employment opportunities. A large percentage of fall visitors also appear to be participating in "cultural tourism" by visiting museums, art galleries, historic sites and festivals or special events. There is also evidence that "agricultural tourism" is attracting fall visitation to farm markets, gardens, and wineries. And, many resort areas have been attempting to prolong their season by adding spa amenities. The fall visitor data indicates that a number of visitors used spa services on their trip.

The effectiveness of this data will be enhanced with seasonal monitoring to show increases or decreases in visitor demand, and allow tourism organizations to respond accordingly.

iv.) Keep it... and they will continue to come.

If the tourism industry in the Vancouver Island region wants to remain sustainable, it must pay attention to what attracts and keeps visitors coming to the area. One of the more significant findings in the fall visitor data demonstrates that the scenic beauty of the region was considered one of the key motivators for visiting the region, and was evaluated most positively by visitors. This is good for the region, in that people received what they came for. It is significant as well to note that if this resource is so vital to the tourism industry for the Vancouver Island region, efforts must be made to ensure that scenic beauty is maintained.

For Vancouver Island, this point could not be more poignant. As an area that depends on its natural resources for numerous industries (fishing, forestry, mining and tourism), the Island region must find ways to balance access to resources and support a diversified economic base. The tourism industry is a relatively new "user" of natural resources and

often struggles to gain access to areas in order to host visitors. The fall data not only shows that Vancouver Island visitors are avid consumers of nature based tourism activities, but also that the scenic beauty is why they come, and what keeps them coming back.

b.) How can this information be used to help grow and sustain the tourism labour market on Vancouver Island?

i.) Local, current information for business plan development.

One of the most significant ways the fall visitor information can assist the development of the regions tourism labour market is in business plan development. New entrepreneurs throughout the Vancouver Island Region have been in need of reliable, current and local statistics to support their business ventures and secure capital. The information will also reduce uncertainty of risk for entrepreneurs and allow them to tailor ideas to meet the existing market, or capitalize on emerging markets.

- ❑ The information for the fall, and upcoming visitor surveys should be provided to organizations that are assisting individuals to start businesses such as Community Futures, Employment Assistance Centres, and Colleges/Universities, etc.
- ❑ The information should also be provided to Economic development offices in all regions of the island.
- ❑ The information should be posted on the Tourism Vancouver Island and Malaspina University-College website to allow easy access for users.

Numerous requests have been received at the project office for the results of the fall visitor data already, and with further analysis the data will provide a useful source of information for sustained tourism development.

ii.) Support and information for existing tourism organizations to attract further visitation and create employment opportunities.

Besides assisting new entrepreneurs, the data from the fall visitor surveys can provide similar benefits for existing tourism organizations to increase success and create additional employment opportunities. The data can be used to refine marketing strategies, create new products, or partner with other organizations to increase length of stay in the Vancouver Island region. All of this will have the same impact on the local labour market by maintaining or expanding tourism generated employment.

iii.) Support for tourism resources.

The usefulness of the fall visitor data can provide collective assistance to tourism organizations as well. Some of the data highlights items that are motivating visitors to visit this region, or demonstrates how visitors evaluate the regional tourism product. Aware of this, there is an opportunity for tourism organizations to work collectively to garner support for tourism resources, enhance access, or remove barriers to further development. Sustaining the tourism labour market requires more than individual business success; it requires systematic, regional cooperation and buy in.

iv.) Use to extend the season and create year round employment opportunities.

Combined with future seasons data, the visitor data will help tourism organizations to better understand the seasonal and Regional needs of the industry. By knowing what visitors are doing in each season and Region, there is an opportunity to overcome seasonal demand by packaging and encouraging year round visitation and sustained employment.

6.) Appendices:

- A. Data Tables**
- B. Field Researcher Training Manual**
- C. Visitor Survey Instrument**

A.) Data Tables

Nature of Visit	Percent
Main destination of trip	72.8
Just passing through	27.2
(Note: non-response = 10.8%)	

Region	0 Nights	1 Night	2-5 Nights	6+ days
South Island	82.3	4	11.3	2.5
South Central Island	95.6	1	2.9	0.6
Central Island	82.8	3.2	8.7	5.2
Pacific Rim	82.8	3.6	10.8	2.7
North Central Island	71.8	5.3	17.2	5.7
North Island	83	6.5	7.4	3.1
Gulf Islands	96.9	0.4	2.1	0.6
Other BC Tourism Regions	93.5	1.1	3.3	2.1

Nights Away From Home	Percent
0 nights	16.5
1 night	8.1
2 to 5 nights	39.8
6 to 7 nights	8.4
8 to 14 nights	18
More than 14 nights	9.2
(No response)	3.70%

Type of Accommodation	0 Nights	1 Night	2-5 Nights	6-7 Nights	7+ Nights
Home of Friend or Family Member	66.2	3.3	17.9	7.5	5.3
Bed and Breakfast	94.9	1.1	4	0	0.4
Resort	84.2	0.9	11.3	1.9	1.8
Campground	96.9	0.4	1.6	0	1.1
Hotel/Motel	61.2	8	22.3	2.3	6.2
Hostel	98.2	0.5	0.4	0.2	0.8
Boat	97.3	0.9	2.7	0	0.2
Other	94.2	2.4	0.9	0.7	1.8

Form of Transportation Used	Percent
Motorcoach on bus or ferry	0
Other	0
Personal float	0.2
Cruise ship	0.2
Float plane	0.8
Chartered aircraft	0.8
Personal vehicle on other ferry	1.5
Walk on passenger on ferry	6
None: trip originated on Vancouver Island	24.8
Airplane to regional airport	26.6
Personal vehicle on BC Ferries	32.6
(No response = 5.7%)	

Level of Convenience	Percent
Very convenient	54.8
Fairly convenient	28
Neither	10.5
Fairly inconvenient	4.9
Very inconvenient	1.6
(Missing = 24.1%)	

Form of Transportation Used	Response (%)
Rental vehicle	17.9
Personal vehicle	55.2
Vehicle of friend or family	15
Taxi or shuttle service	6.5
Motorcoach or bus	5.7
Train	0
RV or vehicle and camper	0.9
Boat	1.4
Motorbike	0.2
Bicycle	1.8
Kayak or canoe	1.8
Note: multiple choices allowed	

Table 8. Main Purpose of Trip (Q.8)	
Purpose of Trip	Response (%)
For business or work	26.5
For leisure	59
Both business and leisure	7.2
Personal (e.g. health)	7.2
Other	0.2
(No response = 6.4%)	

Table 9. Participation in Outdoor Recreation Activities (Q.9)	
Type of Outdoor Recreation Activity	Response (%)
Whalewatching	7.1
Wildlife viewing	20
Birdwatching	9.7
Fresh water fishing	3.5
Salt water fishing	4.8
Diving	1.6
Kayaking or canoeing	7.6
Hiking	28.5
Cycling or mountain biking	5.3
Climbing	2.1
Golfing	7.6
Sailing	1.4
Surfing	1.9
Caving	1.1
Motorboat cruising	2.3
Downhill skiing	4.6
Snowboarding	5.1
Cross country skiing or snowshoeing	1.9
Horseback riding	1.8
Other	19.6
(Note: multiple responses)	

Table 10. Tourist Attractions Visited (Q.10)	
Tourist Attraction	Response (%)
Museums	20.7
Historic sites	15.9
Parks	30.1
Festivals and special events	9.7
Art galleries	17.3
Shopping malls	32.4
Spa	6.5
Local shops and artisans	32.6
Gardens	8.1
Wineries	3.5
Farms, country markets	8.3
First Nations facilities or events	6
Beaches	26.7
Playgrounds and water parks	3
Amusement parks and centres	1.4
Educational institutions/centres	3.9
Other	9
(Note: multiple responses)	

Table 11. Food and Beverage Establishments Used (Q.11)	
Type of Establishment	Response (%)
None	31.5
Fast food	15.4
Fine dining	21.2
Family restaurants	28.7
Pubs or lounges	23.9
Nightclubs	2.1
Other	9.2
(Note: multiple responses)	

Table 12. Features Considered When Deciding on this Visit (Q.12)					
Feature	Importance				
	Not at all	Low	Medium	High	Extremely High
Quality accommodation	26.8	6.3	20.3	32.4	14.2
Variety of amenities near accommodation	22.1	12.9	26	29.7	9.2
Quality restaurants	17.2	12	30.8	28.5	11.5
Friendliness of people	11.9	3.7	19.5	37.9	27
Safety	13.6	4.2	18.8	33.4	30
Scenic beauty	11.9	4	14.9	32.9	36.4
Suitable weather	21.2	17.6	29.6	20.2	11.3
Shopping opportunities	32.2	25.2	23.5	12.3	6.8
Number of attractions	26.2	21.5	28.1	17.8	6.4
Outdoor recreation opportunities	21.6	13.7	19.5	27.2	18
Easy place to get to	15.9	10.9	27.8	29.5	15.9
Good value for money	15.1	4.7	24.3	35.2	20.6
Favorable exchange rate	52.7	7	12.7	14.4	13.2
Overall atmosphere of area	11.9	2.6	14.5	37.3	33.8

Table 13. Group Spending "Yesterday" (Q.13)	
Group Spending	Response (%)
Less than \$50	21.7
\$50 - \$100	21.4
\$101 - \$150	13
\$151 - \$200	10.3
\$201 - \$250	7.2
\$251 - \$300	5.6
\$301 - \$400	6
\$401 - \$500	3.9
\$501 - \$600	2.3
\$601 - \$700	1.2
\$701 - \$800	1.2
\$801 and higher	6.2
(Note: non response = 8.8%)	

Table 14. Advance Planning of Trip (Q.14)	
How Far Ahead	Response (%)
Spur of the moment	14.2
Up to one week	29.8
Between one week and one month	32.1
Between one to six months	24.9
More than six months	9
(Note: non-response = 5.3%)	

Figure 15. Previous Visits to Vancouver Island (Q.15A)	
Number of Previous Visits	Response (%)
No previous visits	20.2
1 to 5 previous visits	41.3
6 to 10 previous visits	16.5
More than 10 previous visits	21.9
(Note: no-response = 37.9%)	

Table 16. Previous Visits to Place Where Survey Conducted (Q.15B)	
Number of Previous Visits	Response (%)
No previous visits	28.3
1 to 5 previous visits	42.4
6 to 10 previous visits	11.6
More than 10 previous visits	17.6
(Note: non-response = 28.7%)	

Table 17. Sources of Information Used to Plan Trip (Q.16)	
Information Sources	Response (%)
The internet	41.1
Friends and relatives	44.1
Business contacts or sources	20.4
Travel agent	9.2
Previous personal experience	32.2
Travel information centre in home town	2.7
Other travel information centre	3.7
Vancouver Island Visitors Guide	6.4
Other regional tourism guide	3.2
1800 Tourism BC Info Number	1.4
Magazine	1.9
Travel brochure on BC Ferries	3.7
Travel brochure on other ferry service	1.4
Travel show	0.9
Newspapers	3.4
Other	10.8
(Note: multiple responses allowed)	

Information Sources	
The internet	2.9
Friends and relatives	53.8
Business contacts or sources	6.5
Travel agent	1.3
Previous personal experience	18
Travel information centre in home town	0.3
Other travel information centre	0.3
Vancouver Island Visitors Guide	0.3
Other regional tourism guide	0.3
1800 Tourism BC Info Number	0
Magazine	0.5
Travel brochure on BC Ferries	0.3
Travel brochure on other ferry service	0.3
Travel show	0
Newspapers	0.8
Other	14.6
(Note: non-response = 32.2%)	

Information Sources	Response (%)
The internet	6
Friends and relatives	47.8
Business contacts or sources	18.6
Travel agent	0.7
Previous personal experience	12.6
Travel information centre in home town	0
Other travel information centre	0
Vancouver Island Visitors Guide	0
Other regional tourism guide	0
1800 Tourism BC Info Number	0.2
Magazine	0.5
Travel brochure on BC Ferries	0
Travel brochure on other ferry service	0
Travel show	0.5
Newspapers	0.7
Other	12.3
(Note: non-response = 26.7%)	

Comment	Response		
	Very Unlikely	Neither	Very Likely
You will return to Vancouver Island	6.9	4.9	88.2
You will return to this region	6.8	9.6	83.6
You will recommend Vancouver Island to a friend	7.1	2.8	90
You will recommend this region to others	7	7.7	85.3

	Extremely Bad	Fairly Bad	Neither	Fairly Good	Extremely Good
Quality accommodation	0.3	0.9	7.5	36.1	55.2
Variety of amenities near accommodation	0.3	2.5	15.8	50	31.4
Quality of restaurants	0.8	1.5	16.4	46.3	35
Friendliness of people	0.2	0.7	5.7	30.9	62.6
Safety	1	1	9.3	36.4	52.3
Scenic beauty	0.2	0.5	3.4	18.9	77
Suitable weather	1.9	10.7	19.3	29.5	38.5
Shopping opportunities	2.3	6.4	28.9	36.4	26
Number of attractions	2.4	2.4	30.1	34.5	30.7
Outdoor recreation opportunities	0.9	1.1	17	30.5	50.6
Easy place to get to	1.7	4.2	16	37	41
Ability to obtain information	1.7	2.2	14.1	39.3	42.7
Quality of service	0.5	1	9.5	43	46.1
Availability of services	0.5	2.2	15.7	48.5	33.1
Value for money	0.5	2.3	17.3	43.6	36.3
Favorable exchange rate	2.5	3	20.2	28.8	45.5
Overall atmosphere	0.2	0	6.9	35	57.9
Overall satisfaction	0.2	0.5	5.1	34.6	59.6

Group Type	Response (%)
Traveling alone	31.2
Traveling with a spouse or equivalent	36.6
Traveling with same sex partner	1.9
Traveling with friends	15
Traveling with children and/or parents	11.5
Traveling with organized group or tour	4.2
(Note: multiple responses are allowed)	

Age Category	None	1 person	2 people	3-5 people	More than 5
People under 10 years	93.4	3.9	2.1	0.4	0.2
People 11-20 years	89.8	6.1	1.6	2.2	0.4
People 21-30 years	78.8	11.9	5.8	1.4	2.2
People 31-40 years	71.6	17.7	5.6	3.2	2
People 41-50 years	65.6	19	10.2	2.4	2.9
People 51-60 years	68.2	17.3	11.4	2	1.2
People 61-70 years	87.7	7.6	3.5	0.6	0.6
People 71-80 years	95.3	2.2	2.5	0	0
People 81-90 years	99.2	0.8	0	0	0
People over 90 years	99.8	0.2	0	0	0

Income Level	Response (%)
Less than \$20,000	7.8
\$20,000 - \$39,999	13.4
\$40,000 - \$59,999	19.6
\$60,000 - \$79,999	20.9
\$80,000 - \$99,999	16.5
Over \$100,000	21.8

(Note: non-response = 20.5%)

Vancouver Island	34.4
Other BC	24.3
Alberta	16.8
Ontario	6.2
Other Canada	5.3
United States	6.6
Europe	1.9
Asia	1.2
Other International	2.3

TOURISM LABOUR MARKET RESEARCH PROJECT



Field Research Manual

This manual has been prepared to train and assist the field researchers working on the visitor study of the Tourism Labour Market Research Project coordinated by Tourism Vancouver Island and the Recreation and Tourism Research Institute at Malaspina University-College.

The Government of Canada has contributed funding to this initiative.



**Government
of Canada**

**Gouvernement
du Canada**

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1. Overview of the study

Purpose:

The visitor study that you are involved with is intended to provide the tourism industry on Vancouver Island with up to date, accurate and local statistics on visitors to the Vancouver Island region. Currently, this type of data does not exist.

Who is doing the study?

The study is being undertaken by a partnership with Tourism Vancouver Island and the Recreation and Tourism Research Institute at Malaspina University-College. The study is part of a larger project entitled the Tourism Labour Market Research Project. This entire project is funded by the federal government under the Human Resources Development Canada Office in Nanaimo. The project will go on for one year starting in September of 2002 to August 2003.

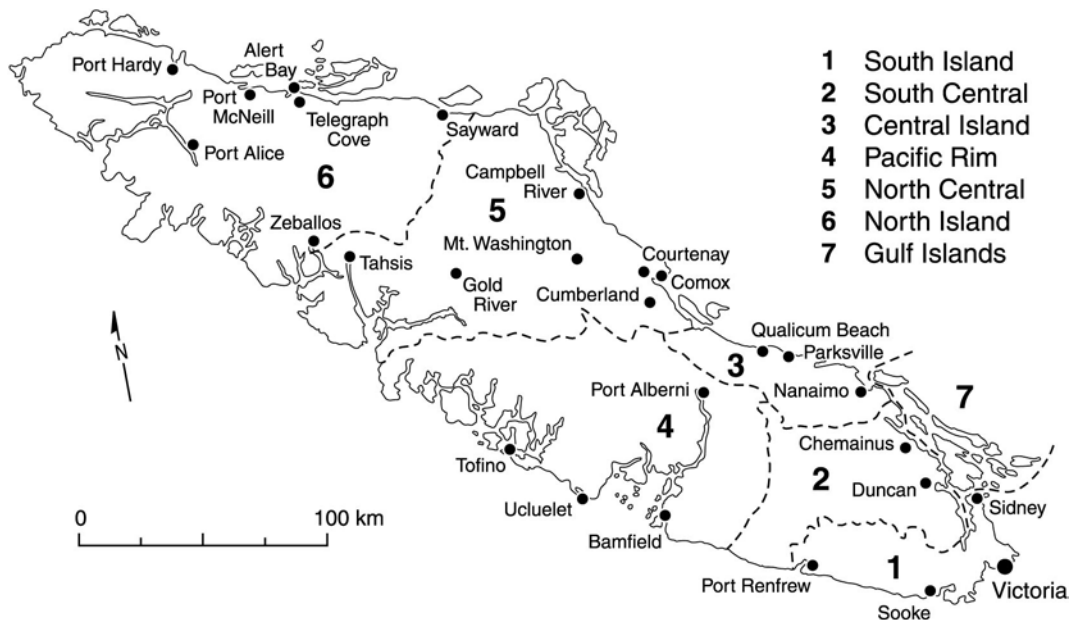
Data is being collected by 6 researchers stationed at different locations on the island. The regions are shown on the map below. The Gulf Islands do not have a specific researcher, but will be covered by the researcher closest to the island.

In a nutshell, the researchers are intercepting (or greeting) visitors at a variety of venues. There, they will “screen” the visitor to see if he/she is from outside the region. If they indeed are a visitor from outside the region, they are asked to participate in the study by completing a survey. The survey takes about 10 minutes to complete, and it is done by the visitor while the researcher waits nearby.

How long is the research going on?

Surveys will be collected for 9 – 10 weeks in the each of the four seasons (fall – Sept to Dec, winter – Jan to March, spring – April to June, Summer – July to August). Researchers will collect approximately 35 surveys in each week working about 14 hours per week. In the summer, researchers will do approximately 50 surveys working about 30 hours per week.

1. Regions involved in the study:



It is very important to collect visitor information to all regions of the island so that those destinations know more about their visiting market and can work to enhance the experience of visitors. For some regions, collecting visitor data is never a problem because numerous visitors are around at all times of the year such as in Victoria. In other regions, visitor traffic can be quite seasonal, so finding and intercepting visitors may be more difficult. But, it is not impossible and one of the goals of this study is to find where those visitors are, so we can continue to track them in future years. This may take a bit of time, but in the end the results will be extremely useful.

Steve, the project manager, may at times ask field researchers to move outside of their regions to assist in data collection in regions that may be experiencing increases in visitors (i.e. special events), or where a field researcher is unable to work for a period of time.

2. Sample

Sample is another term for the group of visitors that we are including in our study. Our sample is all visitors traveling on Vancouver Island. This includes people who are coming to Vancouver Island but

also visitors from one region of the island traveling to another region (i.e. visitors from Nanaimo traveling to the West Coast, etc.).

The sample will be collected at a variety of venues. This is being done so that we have a higher chance of capturing different types of visitors, and more of them. But it will also make the results more useful for a variety of organizations and businesses involved in tourism.

Each of the locations that we are intercepting visitors will approve of our study. In other words, Steve will gain permission from each venue to do research. He will let you know which ones he has gained permission from in your region, and will provide you with an excel spreadsheet so that you have access to contact information for each location. He will also provide each venue with your number in case they want to contact you about the study.

As this has not been done before, the Fall period will be one of trial and error. Field researchers can expect that some places will not be open for the season, so we will try them again when they are open. Other places may be open but not have a lot of visitors. In that case, we will want to report that to Steve so that an alternate location is found.

Once spring comes, we should have a much better system in place and know where we can intercept visitors easily.

3. Survey

A copy of the visitor survey is included in the appendix. You should become familiar with the survey so that you can help answer people's questions. If you are unclear about any of the questions, please contact Nicole Vaugeois, the Research Coordinator at 754-3500 or via vaugois@mala.bc.ca

Steve will get these surveys copied and delivered to you regularly. Make sure you keep him updated about how many you are using and give him at least 10 days to get you another shipment.

Each survey is numbered on the back. This is so we can record the information when we receive the surveys. They are also coded according to region. For example:

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

Make sure that you use an appropriately coded survey for the region you are in. Many of you will have some for your main region, and some for the Gulf Islands. It is important to make sure that you use ones coded GI for any visitors you intercept in the Gulf Islands.

4. Parameters of the project:

As a researcher, it is important to recognize that there are some parameters to this project. Jeopardizing these may put the accuracy of our data at risk.

On-site protocol

- Intercept visitors at random

It is important that we get a good cross section of visitors in our study. This means that you will have to choose who you are going to intercept randomly (in cases where there are lots of visitors of course! There is no sense being random when you only come across 5 visitors a day!). Sometimes we approach visitors that look friendly, or look similar to us (same gender, age, etc.). Make sure you are balancing this out because if you only approach women, it will look like the only people that come to your region are women!

- Intercept only at approved venues

It is important to intercept only at approved locations. We will not create support for our research if we “trespass” and “bother” guests at a location that does not approve. Save yourself and the project and only go to those that are approved.

If you think of a good location to intercept visitors, please make sure to tell Steve. He can make a phone call and introduce the owner/manager to our project and then ask for permission. Keep your eyes open for special events going on in your region as these are often great places to intercept visitors. The organizers still must approve of you being there, however. And if there are a lot of visitors, you can request to Steve to ask another researcher to join you for the day so you capture more people.

- Obtain consent from your visitors

This research project has been approved by the Human Subjects Committee at Malaspina University-College. What this means is that it has been approved to be ethical in the treatment of individuals who are involved in the study. Of course, it was approved with conditions that we need to meet. One of these is that you must obtain consent from the visitors you intercept. More information on how to do this is contained in the step by step section of this manual.

Relationship building

Introduce yourself to the contact person at your venue

It is important to build a relationship with the contact people at the locations you will intercept at. The first time you go there, make sure to meet the individual provided by Steve, or in the case that this person does not work at that location, the manager in charge. In this first interaction make sure to:

Introduce yourself

Ask where they would like you to intercept visitors

Ask what good times would be to intercept visitors

Let them know where to contact you if they expect a time when a lot of visitors will be around.

Flexibility in data collection

Some of this has already been covered. What flexibility in data collection means is that you, as the researcher in your area, are being given flexibility in the dates and times that you intercept visitors at. It is difficult for us in the office to know the best times and dates for you to go to each location, so we will leave that in your expert hands. This means that you can fit it around your schedule, but also that you can hit the locations at the most opportune times. For example, airports are best hit often on Sunday evenings when people are heading back home.

Treatment of data

Once you collect data, it is very important to ensure that it is kept secure and safe to protect the privacy of the visitors you have surveyed. Data should be placed, with consent forms, into the large envelopes provided for you. At the beginning of each week (after the weekend) you should return this data to the Nanaimo central office.

Project Address is:
Tourism Labour Market Research Project
C/o Tourism Vancouver Island
Suite 203-335 Wesley Street
Nanaimo, B.C. V9R 2Y5

Phone (250) 754-3500
Fax: (250) 754-3599

Depending on how many you are sending it may be cheaper to send it via Express Post. Ask the post office to weigh the package first and go with what ever is cheaper, regular mail or Express Post. Steve has asked that you pay for the post and then put the receipt into the envelope. You will be reimbursed for all postage at the same time as your payday (separate cheque).

Presentation

- Identify yourself and the project

Steve will provide you with a field researcher badge. It is magnetic and you should wear it in a location that is visible to the visitor. Make sure to introduce yourself with your name so that it makes your approach personalized.

If your visitors have questions about the project, do your best to answer them with the information provided here. If you do not know the answer, you should relay that back to Steve, but also give the visitor a contact card (each visitor should get one) so they can connect with Steve if they want to.

5. Intercepting Visitors – Step by Step

This section should be helpful to assist you to intercept visitors in your region. It has been organized as a step by step model, and some of it has already been discussed. Don't read this section in isolation, as the previous sections will provide the context that intercepting visitors will take place in.

a) Location on the sampling scheme

Determine where you will intercept visitors at for a two week period if possible. This way you can plan your own schedule, but you can also ensure that you are going to a variety of types of establishments in that time period. It is very important to try and intercept visitors at each of the venues you have been provided at least twice each season. This will vary however in each season as some venues are not open during the winter months. **TRY NOT TO OVER-SAMPLE IN THE SAME LOCATION.** If you find that you can only find visitors in certain locations, make that clear to Steve and Nicole and in this case – try to sample more in transportation venues (airports, ferries, busses etc.) as all types of visitors use these.

b) Introduce yourself to the owner or management

This is only necessary on the first visit, but it would be a good idea to let the management or front desk know that you are there when you arrive and for approximately how long. Ask the management what are good times (i.e. lots of visitors) for you to intercept visitors.

c) Familiarize yourself with the setting

The first time you visit, you should ask the owner or management where they would like you to intercept visitors. This is a tricky one. You want to make sure you are visible and can approach people in a comfortable setting. Avoid trying to intercept visitors where they are walking along busy corridors, eating at table, or checking in. Times when visitors are waiting or relaxed are best for intercepting. Some visitors may actually approach you if you are located in a visible spot.

d) Get your materials ready

You will be provided with a plastic file box for all of your materials. You will also have a couple of clipboards (one is provided – if you purchase another one, make sure to give Steve the receipts to get reimbursed). Attach a pen to the clip board (not with string as it can be frustrating for the one filling out the survey).

You might want to arrange your clipboard in the following way:

- On top, place your script for intercepting visitors. You will likely memorize and tailor this, but it is good to have it there regardless.
- Underneath that, you should place the consent form (script and then form for signing).
- Underneath, have a few contact cards available to give to the visitor when they are finished completing the survey.

On the clipboard that you provide to the visitor, you should:

- On top provide the survey – with the cover page visible.
- Provide a pen to the visitor.

e) Choose visitors at random

This was discussed previously, but make sure to ask all types of visitors to participate in the study. Avoid always approaching people that are like you (age, gender, etc.).

f) Introduction

You are provided with a script for intercepting visitors. See appendix. Use this format for introducing yourself and the project.

g) Screening

The introduction has you “screen” the visitor to make sure they fit our study. If they do not, thank them for their time. If they do, you will proceed in asking them for some time to participate in the study.

h) Go over consent form and obtain signature

Once individuals agree to participate in the study, you need to briefly go over the consent form with them. Might be a good idea to highlight certain words and practice going over it, stressing the important points (which are underlined).

Once they consent, have them initial the form attached. These should be returned with the accompanying surveys weekly to the research office in Nanaimo.

i) Provide the survey to the visitor

After you gain consent, provide the visitor with the survey on the clipboard. Show them where you will be waiting in case they have any questions.

j) Record location, date, time and survey number

On the consent form, write in the additional information while the visitor is filling out the survey. It is also a good idea to write down any field notes for yourself or Steve and Nicole to look at – things such as weather, how busy the place was etc. may be useful to know for future reference.

k) Thank the visitor and provide them with the contact information card

After the visitor returns the survey to you, thank them and provide them with one of the contact information cards. They can use this card to contact the research team should they have any questions or concerns about the study.

l) File the survey and protect the data

Once you receive the completed survey, make sure to place it in a secure location. You may choose to place it in one of the large envelopes and then into your tote box at the end of the day. Do not leave the data in your vehicle or out on the table at home.

m) Return the data to Steve at the Research Office in Nanaimo

As indicated previously, at the beginning of each week in the data collection period you should send the data to Steve in Nanaimo. See previous page for full mailing address and instructions.

6. Communications

While you are out in your region, keeping the communication lines open and flowing with Steve is very important. Keep Steve up to date on what is working and what is not. Use the recording sheet to allow him to track the number of surveys you are getting and where they are being obtained.

Instead of weekly meetings, Steve will call each researcher once a week to see how things are going. If you ever need to contact him – you can do so at (250) 754-3500 at the office, or his cell phone (250) 716-6076.

Important point:

Steve works 30 hours a week on the project. He is usually in the Nanaimo office Tuesdays to Thursdays. Other days he works out of home where it would be best to contact him by cell phone or email.

In order to communicate with other field researchers and get together in person, we will attempt to have two meetings each season held in Nanaimo. One at the beginning of the season and one at the end. Due to budget constraints however, it may be more feasible for Steve to visit you in the field. We will use some flexibility around this one, but will endeavor to keep the lines of communication open.

7. Payroll, timesheets and expenses

Payday is every two weeks.

1. Send your timesheets/mileage forms in with your weekly reports on Monday of each week electronically. **ROUND OFF HOURS TO THE HALF HOUR.**
2. Also, print off a hard copy and sign it. Put this in with your surveys when you send them in. This is just for tracking purposes.

Your pay cheques will be issued through the mail (unless otherwise arranged)
every two weeks.

Reminder – Fall, Winter and Spring – 14 hrs. per week @ \$11.00 per hour
Summer – 30 hours per week @ \$11.00 per hour

An example of the time sheets is included in the Appendix and can be emailed to Steve.

Expenses that are reimbursed in the project include:

- Mileage – at 43 cents per kilometer
- Postage – include receipts in the returned mail with surveys
- Approved items – such as supplies (clipboards, etc.) when needed. Approve first through Steve.

Note: The actual Visitor Survey was included in the Training Manual as Appendix A but is not duplicated here (see appendix C.)– the actual survey has a cover to it, and is in booklet form.

Appendix B.

SCRIPT

FOR INTERCEPTING VISITORS FOR THE VISITOR SURVEY

Hello, my name is _____ (name of field researcher). I am with the Tourism Association of Vancouver Island and we are conducting a series of Visitor Surveys to better understand our visitors and their travel needs.

Are you a resident of this Region of Vancouver Island?

If yes,

Thanks, we only need to survey visitors to the area. Enjoy your day.

If no,

Do you have approximately 10 minutes to participate in our study?

Yes	No
Great, thank you.	Thank you for your time.
I am first going to briefly go over a consent form so that you are familiar with the study and what will be done with your survey.	Enjoy your visit.
<i>Review and signing of the consent form.</i>	
Please keep this card as a copy of your consent, and as a way to contact our research team. <i>(provide card)</i>	
Here is a copy of the survey and a pencil. When you are done, please pass the survey back to me. I will be waiting over there <i>(indicate location)</i>	
Do you have any questions before you begin?	
<i>When completed...</i>	
Thank you for taking part in our study. Your responses will allow us to better serve future visitors to the region.	
Have a great day.	

Tourism Labour Market Research Project

Visitor Survey Consent Form

This visitor study is being undertaken to determine who is traveling to and within Vancouver Island, what are visitors doing on their trips, and how satisfied they are with the destinations they visited. The questions asked in the study will allow organizations involved in tourism to better meet the needs of all visitors and ensure that tourism remains a viable industry for Vancouver Island communities.

This survey will assist us to obtain the above information. As a willing participant in the study you will be asked to complete a **25-question survey** with questions about **your current visit**. The survey is easy to answer and should take approximately **10 minutes** of your time.

Your participation in this study is **completely voluntary**. You have the **right to refuse to answer any questions** or to **withdraw** at any time in the process, for any reason and without an explanation or penalty.

All responses that you provide will remain **completely anonymous and confidential**. After completing the survey, simply return it to the research assistant who asked you to participate. Once we receive the survey, we will record the data in our computer system and retain the written copies in a secure location for one year after which time all surveys will be shredded. As there is no way to trace your survey back to you once you send it in, your information will again remain anonymous. **Information will be used for the sole purpose of this research study and will not be shared.**

Your responses will benefit the destinations you are visiting by allowing us to know more about you and your travel behavior and preferences. This will allow tourism organizations on the island to improve our products and services and satisfy you and others on future visits to the region. There are no inherent risks in participating in this study.

If you should need to contact the research team with questions about this study, please contact Steve Wohleben, the project manager at (250) 754-3500 or via email at steve@islands.bc.ca.

I have read and fully understand the statements above. I hereby consent to participating in this study.
Please read this consent form and sign on the sheet attached.

Thank you for your time.

Visitor Survey Consent
Participant Consent

I voluntarily agree to participate in this study.

Survey Number	Signature or initials of the participant	Gender	Time	Date	Location	Notes
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				
		M/F				

Visitor Contact Card

Appendix D.

Thank you for agreeing to participate in our Visitor Survey.

- Your responses will remain anonymous and strictly confidential.
- Your responses will assist Tourism organizations on Vancouver Island to meet the needs of all visitors, and ensure that tourism remains a viable industry for our communities.

If you have any concerns about this project please contact either:

Steve Wohlleben, Project Manager
TOURISM LABOUR MARKET RESEARCH PROJECT
203-335 Wesley Street Nanaimo, B.C. V9R 2T5
Tel: (250) 754-3500 Email: research@islands.bc.ca

Lynn Traynor
Malaspina University-College
Phone: (250) 753-3245 Local 2759
Email: traynor@mala.bc.ca



**Government
of Canada**

**Gouvernement
du Canada**

EXAMPLE TIME SHEET

Appendix E.

Vancouver Island Tourism Labour Market Research Project

Notes: Please complete daily and submit to steve@islands.bc.ca each Monday,

Survey Number	Time	Date	Location	Comments	Hours/Day	Mileage/Day
1	8:00 am	1-Nov	Harbour Air	Nice day	2 hrs	0
2	Same	1-Nov	Same	Lots of business		0
3	Same	1-Nov	Same	Travelers		0
4	Same	1-Nov	Same			0
5	Same	1-Nov	Same			0
6	10:00 am	1-Nov	Coast Bastion Inn	Quiet afternoon	2 hrs	0
7	Same	1-Nov	Same			0
8	Same	1-Nov	Same			0
9	Same	1-Nov	Same			0
TOTALS					4 hrs	

D. Visitor Survey:

Note: Actual Survey is printed in booklet form and includes a cover page, which identifies the project partners, contact information, and the contribution of the Government of Canada to the project.

In order to provide high quality experiences for all visitors on Vancouver Island and the Gulf Islands, we would appreciate your input on this visit.

ALL INFORMATION GATHERED IS CONFIDENTIAL.

About this trip...

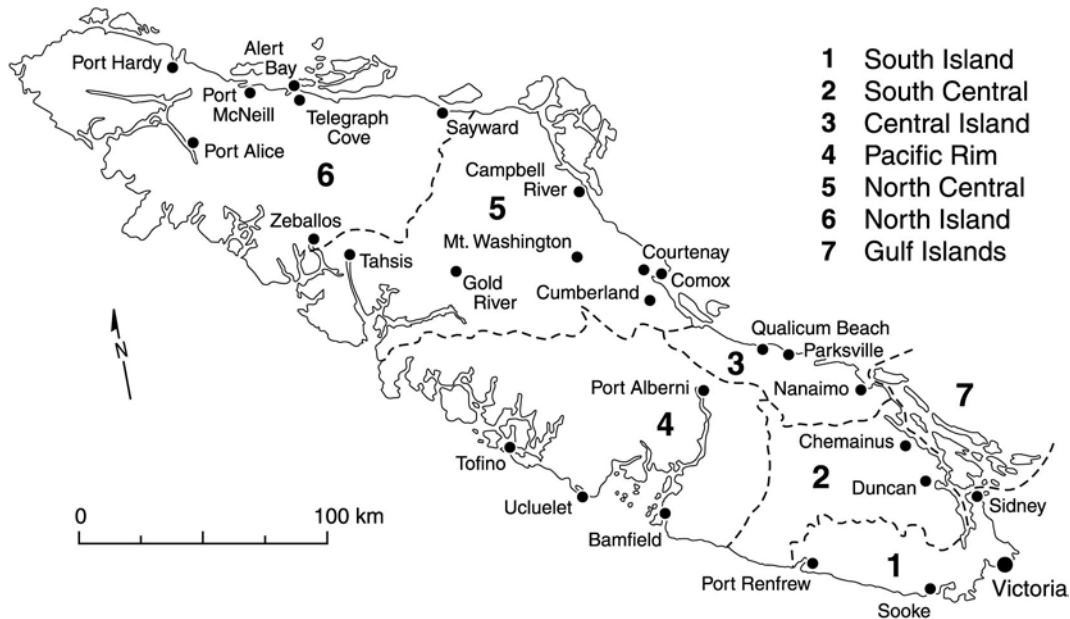
Q.1 Would you say that the visit to the region you are doing this survey is... (please circle the best response)

- 1 THE MAIN DESTINATION OF YOUR TRIP
- 2 A STOP ON YOUR TRIP (JUST PASSING THROUGH)

Q.2 Please refer to the map below. About how many **nights** will you be staying in **each of the regions** on this visit? (please indicate number of nights)

- 0 _____ NONE – DAY TRIP ONLY (Proceed to Question 4)
- 1 _____ NIGHTS IN THE SOUTH ISLAND REGION (Victoria, Sidney, Sooke, etc.)
- 2 _____ NIGHTS IN THE SOUTH CENTRAL ISLAND REGION (Duncan, Chemainus, Lake Cowichan, etc.)
- 3 _____ NIGHTS IN THE CENTRAL ISLAND REGION (Nanaimo, Parksville, Qualicum Beach, etc.)
- 4 _____ NIGHTS IN THE PACIFIC RIM REGION (Ucluelet, Tofino, Long Beach, Port Alberni, etc.)
- 5 _____ NIGHTS IN THE NORTH CENTRAL ISLAND REGION (Comox, Courtenay, Mt. Washington, Campbell River, etc.)
- 6 _____ NIGHTS IN THE NORTH ISLAND REGION (Port Hardy, Port McNeill, Telegraph Cove etc.)
- 7 _____ NIGHTS IN THE GULF ISLANDS (Saltspring, Galiano, Mayne, Gabriola, etc.)
- 8 _____ NIGHTS IN OTHER BRITISH COLUMBIA TOURISM REGIONS (Vancouver, etc.)

MAP OF VANCOUVER ISLAND AND THE GULF ISLANDS



Front cover photo credits: Thank you to George Taylor with Le La La Dancers, Jamie Evans of D.J. Charters, Long Beach Lodge for use of images on the cover of this survey.

Q.3 About how many **nights** in total will you be **away from home**?

_____ NIGHTS

Q.4 How many nights will you spend in each of the following forms of **accommodation** on this trip? (Indicate number of nights in each)

- 1 NONE – DAY TRIP ONLY
- 2 _____ NIGHTS AT THE HOME OF A FRIEND AND FAMILY MEMBER
- 3 _____ NIGHTS AT A BED AND BREAKFAST
- 4 _____ NIGHTS AT A RESORT
- 5 _____ NIGHTS AT A CAMPGROUND
- 6 _____ NIGHTS AT A HOTEL/MOTEL
- 7 _____ NIGHTS AT A HOSTEL
- 8 _____ NIGHTS ON A BOAT
- 9 OTHER (PLEASE SPECIFY): _____

Q.5 What form of **transportation** did you use to travel **to and from Vancouver Island**? (Please circle the best response)

- 1 NONE – MY TRIP ORIGINATED FROM VANCOUVER ISLAND (Go to Question 7)
- 2 PERSONAL VEHICLE ON B.C. FERRIES (Car, truck, motorbike, bicycle, etc.)
- 3 PERSONAL VEHICLE ON OTHER FERRY (i.e. Coho)
- 4 WALK ON PASSENGER ON FERRY
- 5 AIRPLANE TO A REGIONAL AIRPORT (please specify airport): _____
- 6 FLOATPLANE
- 7 CHARTERED AIRCRAFT
- 8 PERSONAL BOAT
- 9 CRUISE SHIP
- 10 MOTORCOACH OR BUS ON FERRY
- 11 OTHER (please specify): _____

Q.6 How **convenient** did you find it to travel **to and from Vancouver Island**? (Please circle response)

- 1 VERY CONVENIENT
- 2 FAIRLY CONVENIENT
- 3 NEITHER EASY NOR DIFFICULT
- 4 FAIRLY INCONVENIENT
- 5 VERY INCONVENIENT

Q.7. What form of **transportation** did you use to travel **while on Vancouver Island or the Gulf Islands**? (Please circle **all** that apply)

- 1 RENTAL VEHICLE
- 2 PERSONAL VEHICLE
- 3 VEHICLE OF FRIENDS OR FAMILY MEMBER
- 4 TAXI OR SHUTTLE SERVICE
- 5 MOTORCOACH OR BUS
- 6 TRAIN
- 7 RECREATIONAL VEHICLE (RV) OR VEHICLE AND CAMPER
- 8 BOAT
- 9 MOTORBIKE
- 10 BICYCLE
- 11 KAYAK OR CANOE
- 12 OTHER: (PLEASE SPECIFY) _____

What was the purpose of this trip?

Q.8 Would you describe the **purpose of your trip** to be... (please circle the best response)

- 1 FOR BUSINESS OR WORK (meetings, conferences, etc.)
- 2 FOR LEISURE (vacation, events and festivals, visiting friends and family, etc.)
- 3 FOR A COMBINATION OF BUSINESS AND VACATION
- 4 PERSONAL (health reasons, financial, shopping, etc.)
- 5 OTHER (please specify): _____

Q.9 Please indicate which of the following **outdoor recreation activities** you or members of your party participated or plan to participate in during this trip? (Please circle all that apply)

- 1 WHALEWATCHING
- 2 WILDLIFE VIEWING
- 3 BIRDWATCHING
- 4 FRESH WATER FISHING (e.g. lakes, rivers and streams)
- 5 SALT WATER FISHING (ocean)
- 6 DIVING (scuba)
- 7 KAYAKING OR CANOEING
- 8 HIKING
- 9 CYCLING OR MOUNTAIN BIKING
- 10 CLIMBING
- 11 GOLFING
- 12 SAILING
- 13 SURFING
- 14 CAVING
- 15 MOTORBOAT CRUISING
- 16 DOWNHILL SKIING
- 17 SNOWBOARDING
- 18 CROSS COUNTRY SKIING OR SNOWSHOEING
- 19 HORSE-BACK RIDING
- 20 OTHER (PLEASE SPECIFY): _____

Q.10 Please indicate which of the following **tourism attractions** you or members of your party visited or plan to visit during this trip? (Please circle all that apply)

- 1 MUSEUMS (e.g. B.C. Provincial Museum, etc.)
- 2 HISTORICAL SITES
- 3 PARKS (Pacific Rim National Park, Rath Trevor Provincial Park, etc.)
- 4 FESTIVALS AND SPECIAL EVENTS (e.g. Bath tub days, Filberg Festival, etc.)
- 5 ART GALLERIES
- 6 SHOPPING MALLS
- 7 SPA
- 8 LOCAL SHOPS AND ARTISANS
- 9 GARDENS (e.g. Butchart Gardens, Milner Gardens, etc.)
- 10 WINERIES
- 11 FARMS, COUNTRY MARKETS
- 12 FIRST NATIONS FACILITIES OR EVENTS (Aboriginal tourism)
- 13 BEACHES
- 14 PLAYGROUNDS AND WATER PARKS
- 15 AMUSEMENT PARKS OR CENTRES
- 16 EDUCATIONAL INSTITUTIONS OR CENTERS (courses, programs, etc.)
- 17 OTHER (PLEASE SPECIFY): _____

Q.11 Please indicate which type of **food and beverage establishments** you or members of your party used **yesterday**? (Please circle **all** that apply)

- 1 NONE – PURCHASED AND PREPARED OUR MEALS
- 2 FAST FOOD
- 3 FINE DINING
- 4 FAMILY RESTAURANTS
- 5 PUBS OR LOUNGE
- 6 NIGHTCLUBS
- 7 OTHER (PLEASE SPECIFY): _____

Q.12 How important were each of the following **features** in your decision to take this visit? (Please circle the number that best describes your response)

		NOT AT ALL IMPORTANT	LOW IMPORTANCE	MEDIUM IMPORTANCE	HIGH IMPORTANCE	EXTREMELY IMPORTANT
A	Quality accommodation	1	2	3	4	5
B	Variety of amenities at or near accommodations	1	2	3	4	5
C	Quality restaurants	1	2	3	4	5
D	Friendliness of people	1	2	3	4	5
E	Safety	1	2	3	4	5
F	Scenic beauty	1	2	3	4	5
G	Suitable weather	1	2	3	4	5
H	Shopping opportunities	1	2	3	4	5
I	Number of attractions	1	2	3	4	5
J	Outdoor recreation opportunities	1	2	3	4	5
K	Easy place to get to	1	2	3	4	5
L	Good value for money	1	2	3	4	5
M	Favourable exchange rate	1	2	3	4	5
N	Overall atmosphere of the area	1	2	3	4	5

Q.13 Approximately how much money would you say **your group spent yesterday** on this visit in **Canadian dollars** (including accommodations, transportation, entertainment, food and shopping)? Please circle best response.

- 1 LESS THAN \$50
- 2 \$50 - \$100
- 3 \$101 - \$150
- 4 \$151 - \$200
- 5 \$201 - \$250
- 6 \$251 - \$300
- 7 \$301 - \$400
- 8 \$401 - \$500
- 9 \$501 - \$600
- 10 \$601 - \$700
- 11 \$701 - \$800
- 12 \$801 AND ABOVE

How did you plan for this trip...

Q.14 About how far ahead did you plan your trip? (Please circle the best response)

- 1 SPUR OF THE MOMENT
- 2 UP TO ONE WEEK
- 3 BETWEEN ONE WEEK AND ONE MONTH
- 4 BETWEEN ONE TO SIX MONTHS
- 5 MORE THAN SIX MONTHS

Q.15 About how many previous visits in the **last five years** have you made to... (please specify)

- A. VANCOUVER ISLAND: _____ VISITS
B. THE PLACE YOU ARE DOING THIS SURVEY: _____ VISITS

Q.16 Which of the following **sources of information** did you use to plan this trip? (Please circle all that apply)

- 1 THE INTERNET
- 2 FRIENDS AND RELATIVES
- 3 BUSINESS CONTACTS OR SOURCES
- 4 TRAVEL AGENT
- 5 PREVIOUS PERSONAL EXPERIENCE (Previous visit)
- 6 TRAVEL INFORMATION CENTER IN YOUR HOME TOWN
- 7 OTHER TRAVEL INFORMATION CENTER (Please specify location): _____
- 8 VANCOUVER ISLAND VISITORS GUIDE
- 9 OTHER REGIONAL TOURISM GUIDE (Please specify region): _____
- 10 1 800 TOURISM BC INFO NUMBER (HELLO BC)
- 11 MAGAZINE (please specify): _____
- 12 TRAVEL BROCHURE OBTAINED ON B.C. FERRIES
- 13 TRAVEL BROCHURE OBTAINED OTHER THAN ON B.C. FERRIES
- 14 TRAVEL SHOW
- 15 NEWSPAPERS
- 16 OTHER (Please specify): _____

Q.17 Which of the above sources would you say is where you **first learned about the Vancouver Island region**? (Please specify)

----- FIRST LEARNED ABOUT VANCOUVER ISLAND REGION

Q. 18 Which of the above sources would you say **most influenced your decision** to take this visit? (Please specify)

----- MOST INFLUENCED MY DECISION

How would you evaluate your experience...

Q.19 All things considered, how would you rate the likelihood... (please circle the best response)

		VERY UNLIKELY	NEITHER LIKELY NOR UNLIKELY	VERY LIKELY	NOT APPLICABLE
A	That you will return to Vancouver Island	1	2	3	4
B	That you will return to the region you are doing this survey (see map)	1	2	3	4
C	That you will recommend Vancouver Island to others	1	2	3	4
D	That you will recommend this region to others	1	2	3	4

Q. 20 Recalling your actual experience on this trip, how would you evaluate **each** of the following aspects of your trip? Please circle the number that best describes your experience.

		EXTREMELY BAD	FAIRLY BAD	NEITHER GOOD OR BAD	FAIRLY GOOD	EXTREMELY GOOD	NOT APPLICABLE
A	Quality accommodation	1	2	3	4	5	NA
B	Variety of amenities at or near accommodations	1	2	3	4	5	NA
C	Quality restaurants	1	2	3	4	5	NA
D	Friendliness of people	1	2	3	4	5	NA
E	Safety	1	2	3	4	5	NA
F	Scenic beauty	1	2	3	4	5	NA
G	Suitable weather	1	2	3	4	5	NA
H	Shopping opportunities	1	2	3	4	5	NA
I	Number of attractions	1	2	3	4	5	NA
J	Outdoor recreation opportunities	1	2	3	4	5	NA
K	Easy place to get to	1	2	3	4	5	NA
L	Ability to obtain information	1	2	3	4	5	NA
M	Quality of service	1	2	3	4	5	NA
N	Availability of services	1	2	3	4	5	NA
O	Value for money	1	2	3	4	5	NA
P	Favourable exchange rate	1	2	3	4	5	NA
Q	Overall atmosphere	1	2	3	4	5	NA
R	Overall satisfaction	1	2	3	4	5	NA

Q.21 **What could be done to extend your stay in the area?** (Please specify if you have anything to share)

Q.22 **What could be done to encourage you to return?**

Q.23 **What could be improved to make your next visit better?**

About you...

To better analyze our data, we would like to know a little about you. The following will simply allow us to identify and better plan for specific types of visitors.

Once again, this information is **STRICTLY CONFIDENTIAL AND WILL NOT BE SHARED.**

Q.24 Which of the following describe how you are traveling? Please circle all that apply.

- 1 TRAVELING ALONE
- 2 TRAVELING WITH A SPOUSE OR EQUIVALENT
- 3 TRAVELING WITH A SAME SEX PARTNER
- 4 TRAVELING WITH A FRIEND OR FRIENDS
- 5 TRAVELING WITH CHILDREN AND/OR PARENTS
- 6 TRAVELING WITH AN ORGANIZED GROUP OR TOUR
- 7 OTHER (Please specify): _____

Q.25 How many people in your group fall into **each** of the following age categories? (Please indicate **number** of individuals in **each** age range)

- 1 _____ PEOPLE UNDER 10 YEARS
- 2 _____ PEOPLE 11 - 20 YEARS
- 3 _____ PEOPLE 21 - 30 YEARS
- 4 _____ PEOPLE 31 - 40 YEARS
- 5 _____ PEOPLE 41 - 50 YEARS
- 6 _____ PEOPLE 51 - 60 YEARS
- 7 _____ PEOPLE 61 - 70 YEARS
- 8 _____ PEOPLE 71 - 80 YEARS
- 9 _____ PEOPLE 81 - 90 YEARS
- 10 _____ PEOPLE 91 YEARS OR OLDER

Q.26 Which of the following represents your annual household income before taxes?

- 1 LESS THAN \$20,000
- 2 \$20,000 TO \$39,999
- 3 \$40,000 TO \$59,999
- 4 \$60,000 TO \$79,999
- 5 \$80,000 TO \$99,999
- 6 \$100,000 AND OVER

I am indicating my household income in...(please circle currency)

- 1 CANADIAN CURRENCY
- 2 US DOLLARS
- 3 EURO
- 4 OTHER: (Please specify): _____

Q.27 Where is your home?

CITY OR TOWN

PROVINCE OR STATE

COUNTRY

POSTAL CODE / ZIP CODE

If you are interested in receiving tourism promotional material from the Vancouver Island region, please provide your complete address on a separate sheet of paper available with the researcher.

Any other comments that you would like to share...

Q.28 If there is anything else you would like to comment on about this visit, please request a sheet of paper from the field researcher. We welcome your comments and hope to host you on a future visit!

Thank you for participating in this study.
Please return this completed questionnaire to our researcher.

For processing only:

Survey location: _____

Entered by: _____

Date: _____

Survey number: _____