



## **2016 Vancouver Island Resident Survey**

This study investigates how Vancouver Island residents perceive tourism related products and services in relation to their quality of life. It also measures resident awareness of the organization Tourism Vancouver Island.

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## Introduction

Tourism Vancouver Island is the regional destination marketing organization (RDMO) for Vancouver Island, Victoria and the Gulf Islands. The Organization is contracted by Destination British Columbia to deliver programs and services to the Vancouver Island Region. One of the Organization's strategic priorities is to increase the perceived value of tourism to residents as well as the perceived value of the organization Tourism Vancouver Island.

Vancouver Island residents are important decision makers when it comes to electing and supporting municipal, regional and provincial leaders and organizations. In turn, these elected officials and organizations support the tourism industry through budget, policy and other resources. Evaluating how the public perceives tourism in their community in relation to their quality of life will help Tourism Vancouver Island understand where and how efforts should be focused. Similarly, evaluating resident awareness, value and effectiveness ratings of the organization, Tourism Vancouver Island, will help to determine where and how efforts need to be focused.

The specific research objectives are as follows:

- To evaluate how residents believe tourism in the region contributes to their quality of life
- To evaluate the awareness level Vancouver Island residents have for the organization Tourism Vancouver Island
- To obtain a quantitative measurement that can be administered annually to evaluate the Organization's progress in these areas

## Methods

An Importance-Performance Analysis questionnaire was designed to assess perceived contributions from tourism to quality of life. This type of analysis allows respondents to first rate the importance of certain items and then evaluate the performance of an organization based on these same items. In this study, the items are related to quality of life and the performance being evaluated is that of the tourism industry on Vancouver Island, rather than a specific organization. The results are analyzed by being plotted into segments in addition to seeing where the biggest discrepancies or "gaps" are between the mean importance and mean performance ratings for each item. Where importance and performance ratings match, minimal attention is needed. Where performance ratings exceed importance, minimal attention is needed. The key is to determine where importance exceeds performance. This will be where residents feel that tourism is not contributing to their quality of life as much as it could be. Efforts can then be focused to raise the profile of the tourism industry in this area.

## Implementation

From January 22<sup>nd</sup> to January 27<sup>th</sup> 2016 an online survey was conducted among 500 randomly selected Canadian adults who live on Vancouver Island and who are also Angus Reid Forum panelists. The margin of error—which measures sampling variability—is +/- 4.4%, 19 times out of 20. The sample was balanced by age, gender and region according to the most recent census data to be fully representative

of the adult population of Vancouver Island. Discrepancies in or between totals in data are due to rounding.

## Results

### Quality of life

#### Most Significant to Quality of Life

Based on the list of ten items provided in the questionnaire, three elements emerged as being the most significant to quality of life for Vancouver Island residents. These elements received the highest average responses and were the same as the 2014/2015 results.

The elements rated most significant to quality of life were:

- 1) Overall cost of living including housing prices and groceries with an average rating of 4.35/5
- 2) Space to access the outdoors such as parks, trails, picnic areas, beach access etc. with an average rating of 4.19/5
- 3) Sense of pride in the place I live in with an average rating of 3.98/5

#### Least significant to Quality of Life

Based on the list provided in the questionnaire, three elements emerged as the least significant to quality of life for Vancouver Island residents. These elements received the lowest average responses.

The elements rated least significant to quality of life were:

- 1) Availability of food and beverage establishments such as restaurants and pubs with an average rating of 3.35/5
- 2) Opportunities for recreation activities such as golf, cycling and kayaking with an average rating of 3.34/5
- 3) Opportunities to experience arts and culture such as festivals, events and galleries with an average rating of 3.27/5

#### Overall Significance

For the five point scale used in this survey, ratings of four and five ( $\Rightarrow 4$ ) indicate significance. Based on the amount of fours and fives chosen for each item, a percentage of Vancouver Island residents who find these items to be significant to their quality of life can be determined. Overall, there was very little change from the previous year in both rank and rating.

The results were as follows from highest to lowest:

- 1) 84.1% of Vancouver Island residents thought the overall cost of living including housing prices and groceries was significant to their quality of life. (0.0% from FY14/15)
- 2) 80.6% of Vancouver Island residents thought space to access the outdoors such as parks, trails, picnic areas and beach access was significant to their quality of life. (+1.3% from FY14/15)

- 3) 73.8% of Vancouver Island residents thought sense of pride in the place I live in was significant to their quality of life. (-1.7% from FY14/15)
- 4) 70.7% of Vancouver Island residents thought that the level of economic prosperity such as jobs and household incomes was significant to their quality of life. (+3.2% from FY14/15)
- 5) 69.6% of Vancouver Island residents thought accessibility of transportation systems such as highways, rail, ferries and airports was significant to their quality of life. (-0.8% from FY14/15)
- 6) 62.2% of Vancouver Island residents thought living in an attractive location such as beautiful communities, architecture and public spaces were significant to their quality of life. (+0.2% from FY14/15)
- 7) 50.2% of Vancouver Island residents thought availability of food and beverage establishments such as restaurants and pubs were significant to their quality of life. (+10.1% from FY14/15)
- 8) 49.6% of Vancouver Island residents thought availability of retail opportunities such as shops, markets and malls were significant to their quality of life. (+2.7% from FY14/15)
- 9) 48.1% of Vancouver Island residents thought opportunities for recreation activities such as golf, cycling and kayaking were significant to their quality of life. (-1.8% from FY14/15)
- 10) 44% of Vancouver Island residents thought opportunities to experience arts and culture such as festivals, events and galleries were significant to their quality of life. (+0.3% from FY14/15)

## Contribution from Tourism

### Most significantly contributed to by the tourism industry

Based on the list provided in the questionnaire, three elements emerged as being most significantly contributed to by the tourism industry in the Vancouver Island Region. The elements rated most contributed to by tourism were availability of food and beverage establishments, spaces to access the outdoors and accessibility of transportation systems.

The elements rated most contributed to by tourism were:

- 1) Availability of food and beverage establishments such as restaurants and pubs 3.96/5
- 2) Spaces to access the outdoors such as parks, trails, picnic areas and beach access 3.91/5
- 3) Accessibility of transportation systems such as highways, rails, ferries and airports 3.89/5

### Least significantly contributed to by the tourism industry

Based on the questionnaire, three elements emerged as being the least significantly contributed to by the tourism industry in the Vancouver Island Region. These elements received the lowest average responses.

The elements rated least contributed to by tourism were:

- 1) Their overall quality of life 3.63/5
- 2) Sense of pride in the place they live in 3.59/5
- 3) Overall cost of living including housing prices and groceries 3.51/5

## Overall Significance

For the five point scale used in this survey, ratings of four and five (=>4) indicate a significant contribution. Based on the amount of fours and fives chosen for each item, a percentage of Vancouver Island residents who find these items to be significantly impacted by the tourism industry in the region can be determined.

- 1) 71% of Vancouver Island residents thought availability of food and beverage establishments such as restaurants and pubs were contributed to significantly by the tourism industry in the region. (+10% from FY14/15)
- 2) 69.7% of Vancouver Island residents thought space to access the outdoors such as parks, trails, picnic areas and beach access were contributed to significantly by the tourism industry in the region. (+5.2% from FY14/15)
- 3) 66.9% of Vancouver Island residents thought accessibility of transportation systems such as highways, rail, ferries and airports were contributed to significantly by the tourism industry in the region. (+5.4% from FY14/15)
- 4) 65.3% of Vancouver Island residents thought opportunities for recreation activities such as golf, cycling and kayaking were contributed to significantly by the tourism industry in the region. (+1.5% from FY14/15)
- 5) 63.3% of Vancouver Island residents thought opportunities to experience arts and culture such as festivals, events and galleries were contributed to significantly by the tourism industry in the region. (+5.1% from FY14/15)
- 6) 63.2% of Vancouver Island residents thought living in an attractive location such as beautiful communities, architecture and public spaces were contributed to significantly by the tourism industry in the region. (+7% from FY14/15)
- 7) 61.4% of Vancouver Island residents thought availability of retail opportunities such as shops, markets and malls were contributed to significantly by the tourism industry in the region. (+7.8% from FY14/15)
- 8) 57.3% of Vancouver Island residents thought that the level of economic prosperity such as jobs and household incomes was contributed to significantly by the tourism industry in the region. (+7.5% from FY14/15)
- 9) 57.2% of Vancouver Island residents thought their overall quality of life was contributed to significantly by the tourism industry in the region. (+4% from FY14/15)**
- 10) 54.3% of Vancouver Island residents thought that sense of pride in the place I live was contributed to significantly by the tourism industry in the region. (-4.3% from FY14/15)
- 11) 51.1% of Vancouver Island residents thought overall cost of living including housing prices and groceries was significantly contributed to by the tourism industry in the region. (+4% from FY14/15)

## Determining the Area of Focus: Filling in the Gaps

Based on the list provided in the questionnaire, the elements with the biggest discrepancies between perceived importance and perceived performance were as follows from largest to smallest:

- 1) Overall cost of living including housing prices and groceries
- 2) Level of economic prosperity such as jobs and household income
- 3) Sense of pride in the place I live in
- 4) Space to access the outdoors such as parks, trails, picnic areas and beach access
- 5) Accessibility of transportation systems such as highways, rails, ferries and airports

Respondents rated all other elements listed as having their significance to quality of life exceeded by the contributions from tourism. This means that in these other areas, the amenities contributed to by tourism exceed their needs. Over the previous two survey's these gaps have remained consistent.

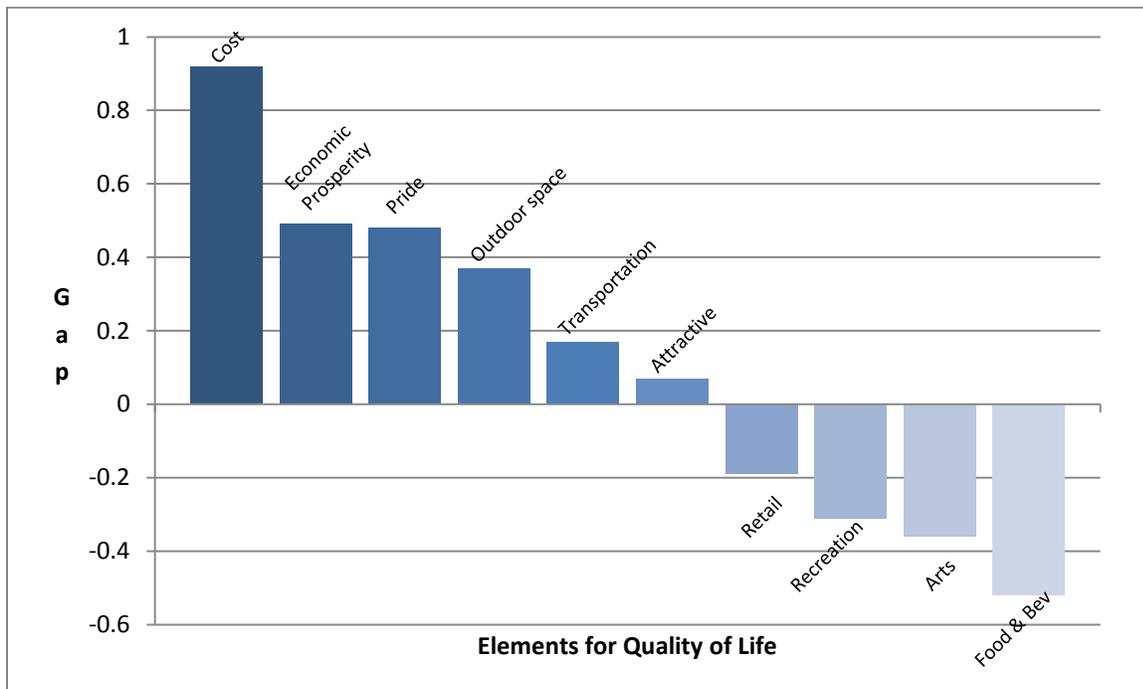


Figure 1. - Discrepancies between Importance and Performance

Figure 1. compares the differences in average response rate between the importance related ratings and the performance related ratings. Where the bar is above 0, there are discrepancies that can be improved upon.

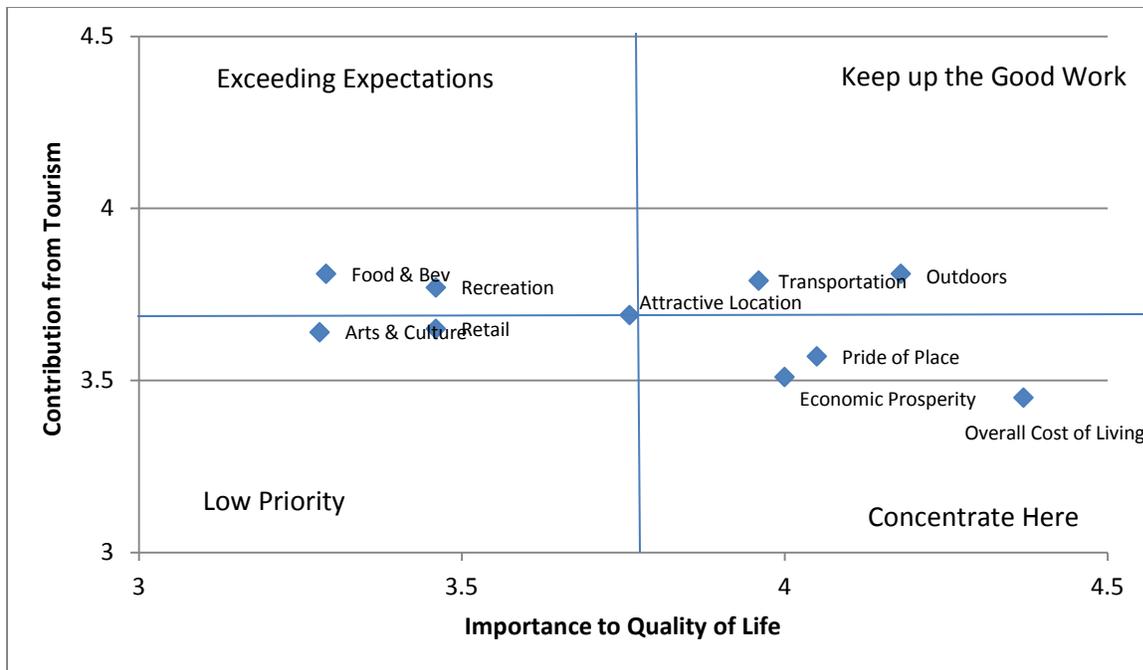


Figure 2. - Importance Performance Matrix

Figure 2. illustrates where different items are distributed on an action grid. The points in the lower right quadrant are those that should be targeted in future campaigns.

## Tourism Vancouver Island

Vancouver Island residents were asked three questions related to the organization Tourism Vancouver Island.

- Residents were asked if they were aware of the organization Tourism Vancouver Island. The results were as follows:
  - Yes - 63.3% (-6.3% from FY14/15)
  - No - 36.7% (+6.3% from FY14/15)

Respondents aged 55+ were significantly more aware of Tourism Vancouver Island by 12.7% than were those aged 35-54 and 18-34. These results were statistically significant indicating there is a true difference in attitude or perception between the oldest demographic surveyed and the rest of the population between 18-34 years of age. Respondents residing in the North Island Region were less aware of Tourism Vancouver Island by 14.3% than were those residing in the Capital Region and Nanaimo Region.

- Residents who were aware of Tourism Vancouver Island were asked how valuable they believe Tourism Vancouver Island is to growing tourism. The results were as follows:
  - Valuable – 67.8%
  - Not Valuable – 4.8%
  - Unsure – 7.7%

Residents with the lowest education (high school or less) were 14.9% more likely to rate Tourism Vancouver Island as valuable to growing tourism than were residents with post secondary education by a statistically significant amount. Residents of the North Island Region were 7.8% less likely to rate Tourism Vancouver Island as valuable to growing tourism than were residents of the Capital Region and Nanaimo Region.

3. Residents who were aware of Tourism Vancouver Island were also asked how effective Tourism Vancouver Island is in growing tourism. The results were as follows:

- Effective – 38.2%
- Not Effective – 8.1%
- Unsure – 25.6%

Again, residents with the lowest education levels rated Tourism Vancouver Island as more effective in growing tourism than those with post secondary education by a significant amount.

### **Awareness of Tourism Vancouver Island & Contributions from Tourism**

Residents who were aware of Tourism Vancouver Island see tourism as contributing more significantly to overall quality of life, as well as aspects related to quality of life by a statistically significant amount. Aspects of quality of life which this group rated as more contributed to by tourism were space to access the outdoors, accessibility of transportation, living in an attractive location, level of economic prosperity, overall cost of living and overall quality of life.

### **Recommendations**

The Importance-Performance Analysis conducted in this study identifies exactly where the “gaps” are between the importance of specific items and the performance of the body being evaluated based on these items.

The most significant gaps identified by the Analysis are related to the cost of living, economic prosperity and pride of place. Given the perceived gap in these areas identified by respondents, future campaigns promoting the “Value of Tourism” to Vancouver Island residents should focus on illustrating the positive impacts of tourism on these three items. This more focused effort may help to improve resident perceptions regarding these three items. Recognizing that item performance (as well as perception) should also be improved, the forthcoming Destination Development Program and related regional planning workshops could prioritize improving the performance of these items where relevant and possible.

It has also been identified that gaps between importance and performance are present regarding the accessibility of transportation systems and spaces to access the outdoors. Given the high score these items received for importance to quality of life, they could be featured as a secondary focus of “Value of Tourism” campaigns.

This study also suggests that younger respondents (18-55 years old) and North Island Region residents are less familiar with Tourism Vancouver Island and view the Organization, and tourism in general, less

favourably than do residents of the Capital Region and Nanaimo Region. With this in mind, “Value of Tourism” campaigns should specifically seek to inform younger Vancouver Island residents and residents of the North Island. Young professionals Organizations, chambers of commerce and business Organizations would likely offer a good opportunities to connect to these groups.

Results indicate that there is much more work to do in communicating and illustrating Tourism Vancouver Island’s regional importance and successes to Vancouver Island residents. This year, only 63.3% of respondents indicated that they were aware of Tourism Vancouver Island ( a decline of 6.3%) and 67.8% of these respondents indicated that it is a valuable organization for growing tourism.

## **Conclusion**

This study offers Tourism Vancouver Island the opportunity to better understand how Vancouver Island residents perceive tourism related products and services in relation to their quality of life. It also measures resident awareness of the organization Tourism Vancouver Island. Evaluating and understanding the public’s perception of tourism in their community in relation to their quality of life helps Tourism Vancouver Island to determine where and how efforts should be focused. Similarly, evaluating and understanding resident awareness, value and effectiveness ratings of Tourism Vancouver Island will help to determine where and how “Value of Tourism” campaigns should focus.

The study identifies that the tourism industry’s perceived contribution to items such as, availability of food and beverage establishments, opportunities for recreation, opportunities to experience arts and culture and availability of retail are exceeding the needs of residents for their quality of life. Items such as accessibility of transportation, space to access the outdoors and living in an attractive location are on par as far as how important these are to quality of life and how much residents perceive tourism contributes to them. Lastly, there is room to improve in how residents perceive tourism in the region contributes to the overall cost of living and the level of economic prosperity in their communities.

Overall, results indicate that 57% of Vancouver Island residents believe that the tourism industry makes a positive contribution to quality of life. It should be noted that younger demographic cohorts (18-34 and 35-55) and residents of the North Island Region are much less likely to perceive that the tourism industry positively contributes to quality of life. Similarly, these younger demographic cohorts and North Island Region residents are less aware of Tourism Vancouver Island. This would suggest that connecting with younger demographic cohorts and North Island Region residents and informing them of Tourism Vancouver Island and the “Value of Tourism” will improve both awareness of the Organization and the tourism industry’s perceived contribution to quality of life.

In comparison to last year, respondents are 6.3% less likely to be aware of Tourism Vancouver Island. Of resident who are aware of Tourism Vancouver Island, 67.8% rated the Organization as valuable for growing tourism, while only 38.2% believe the Organization is actually effective in growing tourism.

This study, when considered along side various iterations of the same study conducted in previous years (2012-2015), illustrates that although resident perceptions are difficult to change, residents are gradually becoming more aware of Tourism Vancouver Island. This year by year analysis also suggests

that current trends indicating that younger demographic cohorts and North Island Region residents are less aware of Tourism Vancouver Island and look less favourably upon the tourism industry's contribution to quality of life, are consistent with historical trends.

In an effort to improve Vancouver Island resident perceptions of the tourism industry's contribution to quality of life in their communities and to improve resident awareness of Tourism Vancouver Island, the Organization should focus its efforts on connecting with younger demographic cohorts and North Island Region residents for the greatest return on investment. Moreover, Tourism Vancouver Island workshops, planning sessions and projects should seek to address or consider the ways in which tourism contributes to quality of life where relevant and appropriate.

## Appendix 1

### Survey Questions

#### Resident Awareness of TVI and Importance/Performance of the Industry on Quality of Life

1. On a scale of 1 to 5, where 1 is not at all and 5 is significant - How significant are EACH of the following items to your overall Quality of Life?
  - a. Spaces to access the outdoors such as parks, trails, picnic areas and beach access
  - b. Accessibility of transportation systems such as highways, rails, ferries and airports
  - c. Availability of retail opportunities such as shops, markets and malls
  - d. Availability of food and beverage establishments such as restaurants and pubs
  - e. Living in an attractive location such as beautiful communities, architecture and public spaces
  - f. Opportunities for recreation activities such as golf, cycling and kayaking
  - g. Opportunities to experience arts and culture such as festivals, events and galleries
  - h. Sense of pride in the place I live in
  - i. Level of economic prosperity such as jobs and household incomes
  - j. Overall cost of living including housing prices and groceries
  
2. On a scale of 1 to 5, where 1 is not at all and 5 is significant - To what extent do you feel the tourism industry in the region contributes to EACH of the following items?
  - a. Spaces to access the outdoors such as parks, trails, picnic areas and beach access
  - b. Accessibility of transportation systems such as highways, rails, ferries and airports
  - c. Availability of retail opportunities such as shops, markets and malls
  - d. Availability of food and beverage establishments such as restaurants and pubs
  - e. Living in an attractive location such as beautiful communities, architecture and public spaces
  - f. Opportunities for recreation activities such as golf, cycling and kayaking
  - g. Opportunities to experience arts and culture such as festivals, events and galleries
  - h. Sense of pride in the place I live in
  - i. Level of economic prosperity such as jobs and household incomes
  - j. Overall cost of living including housing prices and groceries
  - k. Your overall quality of life
  
3. Are you aware of the organization Tourism Vancouver Island?
  - a. Yes (if selected – ask 4 & 5)
  - b. No
  - c. Not sure
  
4. On a scale from 1 being not at all valuable, to 5 being extremely valuable, how valuable is Tourism Vancouver Island to growing tourism?

5. On a scale from 1 being not at all effective, to 5 being extremely effective, how effective is Tourism Vancouver Island to growing tourism?