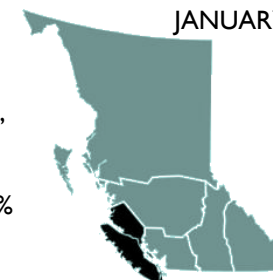


Vancouver Island

REGIONAL TOURISM PROFILE

JANUARY 2015



Overview

In 2012, overnight tourism in British Columbia generated 17.9 million person-visits* and \$8.6 billion in related spending. Vancouver Island, one of six tourism regions in the province, represents 20% of provincial overnight visitation and 16% of related spending.

This profile provides a general overview of the region and summarizes the latest data available about overnight travellers visiting Vancouver Island.

Top markets for Vancouver Island

British Columbia residents make up the largest share of overnight visitation (66%) and spending (41%) in Vancouver Island. Although there are slightly more Washington visitors to Vancouver Island, Albertans spend more money while visiting Vancouver Island.

Top five markets of origin (2012)	Share in Vancouver Island	
	Visitation	Spending
1 British Columbia	66%	41%
2 Washington	6%	7%
3 Alberta	4%	10%
4 Ontario	3%	6%
5 California	3%	4%

About this tourism region

“Everyone needs a little Island time” on this 55,000 km² region of the province, which is characterized by snow-capped mountains and softly curving beaches. The population of the Vancouver Island region continues to grow and is characterized by an older demographic than the province as a whole, with 52% aged 45 years or older compared to the province average of 46%.

The region	2011	% change (2006-11)	Age groups ¹	2011	% change (2006-11)
Population ¹	736,254	4%	0-19 years	19%	-15%
Population as % of BC	17%	+0.4 point change	20-44 years	29%	-8%
Unemployment rate (2013) ²	6%	+1 point change	45-64 years	32%	-2%
			65+ years	20%	3%

Tourism industry	2013	% of BC	Transportation	2013	% change (2012-13)
Businesses ³	3,136	16%	Airport passengers ⁹		
Employment (2012) ³	16,800	13%	Comox	313,186	-5%
Accommodation sector revenue (2012) ³	\$565.7M	17%	Nanaimo	225,251	21%
Room revenue (2012) ³	\$207.7M	n/a	Victoria	1,556,960	3%
Campsites			BC Ferries passengers ¹⁰		
Private/municipal ^{**4}	61	19%	Route 1/2/30	10,275,325	1%
Provincial ⁵	2,000	16%	Cruise passengers ¹¹		
National ⁶	278	24%	Nanaimo	12,382	34%
Custom entries ⁷	803,726	13%	Victoria	482,461	-4%
Visitor centre parties ⁸	288,288	21%	Highway traffic volume (000s) ¹²		
			Route 4 ^{***}	609	0.1%

* A traveller may visit several locations on one trip to British Columbia; a person-visit represents a stay within each region visited.

**Number of campgrounds.

***Data for September is not available.

Trip characteristics by origin

The Vancouver Island region received 3.8 million overnight person-visits in 2012 and generated \$1.3 billion in related spending. Domestic overnight travellers accounted for 75% of visitation and 60% of related spending. International travellers accounted for 25% and 40%, respectively.

On average, domestic travel parties in the Vancouver Island region stayed 3.2 nights and spent \$123 per night during their trip. US travel parties stayed 4.1 nights and spent \$220 per night during their trip, and Other international travel parties stayed 7.6 nights and spent \$122 per night during their trip in the Vancouver Island region.

OVERNIGHT VS SAME-DAY TRAVEL

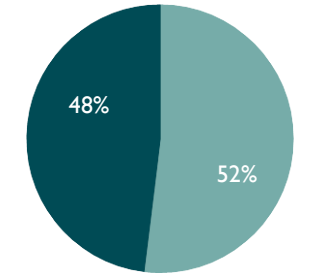
Same-day travel encompasses travellers who enter and leave a destination (i.e. region) in less than 24 hours.

Same-day travellers accounted for 52% of visitor volume and 22% of visitor expenditures in the Vancouver Island region.

	Overnight visitors (000s)	Total		% change (2011-2012)			Share of total		
		Spending (\$000s)	Nights (000s)	Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
*All travellers in Vancouver Island	3,821	\$1,326,817	14,364	-5%	-12%	-4%	100%	100%	100%
BC residents	2,516	\$548,150	7,034	1%	-7%	-1%	66%	41%	49%
Other Canadian residents	350	\$252,045	2,224	-36%	-30%	-29%	9%	19%	15%
US residents	610	\$297,148	2,503	-1%	2%	13%	16%	22%	17%
Other international residents	344	\$229,473	2,602	-6%	-12%	4%	9%	17%	18%
Leisure travellers in Vancouver Island	1,901	\$714,351	6,454	-1%	-14%	-3%	100%	100%	100%
BC residents	1,127	\$279,754	3,244	7%	-19%	1%	59%	39%	50%
Other Canadian residents	129	\$100,686	748	-29%	-26%	-25%	7%	14%	12%
US residents	439	\$217,227	1,580	-5%	0%	0%	23%	30%	24%
Other international residents	206	\$116,685	882	-6%	-14%	-2%	11%	16%	14%

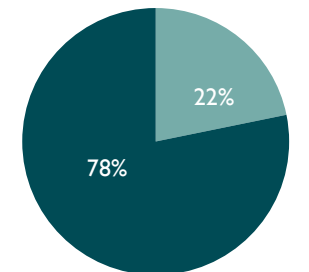
*Travellers main purpose of the trip to Vancouver Island is classified as either Leisure (50%), Visiting Friends and Relatives (39%), Business (6%), and Other (5%).

Traveller volume (Total = 7.9 million)



Legend: Same-day (light teal), Overnight (dark teal)

Traveller expenditures (Total = \$1.7 billion)



Accommodation

Approximately half of all traveller nights in the Vancouver Island region were spent in the residences of friends and family for British Columbia, Other Canadians, and Other international residents. US residents spent more nights in hotels and motels than visitors from other markets of origin. British Columbia and Other international residents were more likely to stay at camping or RV park facilities than other markets of origin.

Primary accommodation*	BC residents	Other Canadians	US residents	Other international
Friends and family	53%	50%	39%	53%
Hotel	15%	23%	39%	32%
Motel	2%	3%	5%	3%
Other commercial fixed roof	4%	11%	7%	4%
Camping/RV parks	15%	5%	2%	8%

*Please note the sum will not equal 100% for each market as other non-paid accommodation is not included in the table.

Seasonality

Most people travelled in the Vancouver Island region during the peak summer months, particularly Other Canadians, US residents and Other international travellers. Over one-quarter of Other Canadians, US and Other international travellers visited during the spring months from April to June, particularly US residents (32%). British Columbia residents were more likely to travel to the region during the winter months than other markets of origin.

Season of travel	BC residents	Other Canadians	US residents	Other international
January to March	20%	15%	7%	12%
April to June	22%	31%	32%	28%
July to September	37%	42%	46%	49%
October to December	21%	12%	15%	11%

Trip activities

Overnight travellers who spent one or more nights in the Vancouver Island region took part in a number of outdoor activities during their trip, including visiting national or provincial parks, visiting a beach, hiking/backpacking, and boating.* For non-British Columbians, cultural activities were equally participated in with many visiting a museum/art gallery, zoo or aquarium, or a historic site during their trip.

	BC residents	Other Canadians	**US residents	**Other international
1	Beach	Beach	Zoo or aquarium	National, provincial or nature park
2	Hiking or backpacking	National, provincial or nature park	Historic site	Museum or art gallery
3	National, provincial or nature park	Hiking or backpacking	Museum or art gallery	Zoo or aquarium
4	Camping	Wildlife viewing or bird watching	National, provincial or nature park	Historic site
5	Wildlife viewing or bird watching	Historic site	Boating	Boating

*Please note that the activities listed could have taken place anywhere on the trip, not just in Vancouver Island.

**Please note that the following activities were not included in this analysis: visit friends or family, shopping, sightseeing, bar/night club, sport/outdoor activity unspecified.

Data sources for travellers in Vancouver Island

The International Travel Survey (ITS) and the Travel Survey of Residents of Canada (TSRC) are ongoing surveys conducted by Statistics Canada in partnership with the Canadian Tourism Commission and some provinces, including BC.

The ITS and TSRC provides statistics on the volume and demographics of domestic and international travellers and on characteristics of their trips such as activities, expenditures, places visited, accommodations and length of stay.

The data are based on the 2012 results for those who travelled in Canada and spent at least one night in Vancouver Island. For more information, please visit www.statcan.gc.ca.

Other data sources are noted where appropriate and listed on page 4.

Regional comparisons

Travel characteristics by region	*Overnight visitors (000s)	Total		% change (2011-2012)			Regional share of total		
		*Spending (\$000s)	Nights (000s)	Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
All travellers in BC	17,905	\$8,614,261	52,294	1%	-2%	-33%			
Cariboo Chilcotin Coast	549	\$1,118,508	1,851	6%	-8%	12%	3%	1%	2%
Kootenay Rockies	1,815	\$607,379	6,758	1%	15%	8%	9%	7%	8%
Northern BC	1,027	\$391,778	4,048	-2%	-4%	17%	5%	5%	5%
Thompson Okanagan	3,827	\$1,140,998	13,598	0%	-8%	1%	20%	14%	17%
Vancouver, Coast & Mountains	8,266	\$4,658,547	40,370	0%	2%	9%	43%	57%	50%
Vancouver Island	3,821	\$1,326,817	14,364	-5%	-11.6%	-4%	20%	16%	18%
Leisure travellers in BC	8,707	\$4,591,925	34,357	1%	1%	-1%			
Cariboo Chilcotin Coast	303	\$83,163	1,130	6%	13.5%	25%	3%	2%	3%
Kootenay Rockies	1,129	\$432,746	4,377	0%	11.8%	5%	12%	10%	13%
Northern BC	394	\$200,708	1,400	-2%	28%	-3%	4%	5%	4%
Thompson Okanagan	1,759	\$688,392	6,395	-8%	-4%	-8%	18%	15%	19%
Vancouver, Coast & Mountains	4,094	\$2,333,585	14,306	4%	6%	2%	43%	52%	42%
Vancouver Island	1,901	\$714,351	6,454	-0.7%	-14%	-3%	20%	16%	19%

*Please note the visitation of all regions will not equal the provincial total as travellers can visit multiple regions on one trip and the spending of all regions will not equal the provincial total as the "unspecified" region is not included in the table.

Sources

1. 2011 Census, Statistics Canada
2. BC Stats
3. Tourism Statistics, BC Stats
4. Hello BC
5. BC Parks
6. Parks Canada
7. Statistics Canada
8. Destination BC
9. Individual airports
10. BC Ferries
11. Cruise BC
12. BC Ministry of Transportation

Data tables are based on Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada (pooled) and/or the International Travel Survey 2011/2012. All computations on these microdata were prepared by Research Resolutions & Consulting Ltd. on behalf of Destination BC and the responsibility for the use and interpretation of these data is entirely that of the author(s).

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