



## RESEARCH & PLANNING

# 2007 SUNSHINE COAST VISITOR STUDY FINDINGS

February 2009

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## ACKNOWLEDGEMENTS

The 2007 Sunshine Coast Visitor Study was a comprehensive survey of travellers to the Sunshine Coast between June and August of 2007.

Funding for this study came from the Tourism British Columbia's Community Tourism Foundations® program.

Tourism British Columbia would like to gratefully acknowledge BC Ferries for providing access for on-site interviews of their clients and by providing administrative data.

This report was written by Karim Dossa on contract with Research & Planning, Tourism British Columbia.

## Executive Summary

The Community Tourism Foundations® Visitor Study of the Sunshine Coast was undertaken in the summer (June 8 through August 31) of 2007. The study was designed to provide information on the characteristics and volume of travellers to the Sunshine Coast and to support marketing plan design and product development in the Sunshine Coast area. Funding for this project was provided by Tourism British Columbia's Community Tourism Foundations® program. The project was managed and carried out by Tourism British Columbia's Research & Planning department.

The study objectives were:

1. To profile travellers who visit the Sunshine Coast in terms of traveller and trip characteristics.
2. To estimate visitor volume and tourism expenditures of travellers exiting the Sunshine Coast by the Westview or Langdale BC Ferries terminals during June – August 2007.
3. To profile users of the Powell River Visitor Centre in terms of traveller and trip characteristics.
4. To estimate the influence of the Powell River Visitor Centre on the decision-making process of travellers in British Columbia, on the length of stay, expenditures, and selection of additional or alternative activities, attractions or destinations.

## Methods

To fulfill the multiple objectives of this study information was collected using a number of methods and data sources. Information was collected from:

- Administrative data from BC Ferries,
- Exit surveys from the Sunshine Coast at the Westview (Upper Sunshine Coast to Vancouver Island (Courtenay/Comox)), and Langdale (Lower Sunshine Coast to West Vancouver (Horseshoe Bay)) ferry terminals,
- Other on-site interviews conducted at the Powell River Visitor Centre and Saltery Bay ferry terminal, and
- A comprehensive mailback questionnaire.

Information presented here is representative of travellers exiting the Sunshine Coast by the Westview or Langdale BC Ferries terminals between June and August of 2007 and is not representative of travellers departing the Sunshine Coast by private boats, floatplanes or airplanes.

## Results

The results of the study have been segmented by type of traveller to the Sunshine Coast region. The report is organized by those traveller segments including: overnight non-business travellers, non-business day trip travellers and business travellers.

Overall, between June 8 and August 31 of 2007 an estimated 349,000 travellers visited the Sunshine Coast (Table ES1). Of the travellers who visited the Sunshine Coast in the study period: 98% or nearly 343,000 travellers exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals and 2% or 6,300 travellers were resident regional travellers.

Table ES1. The number of travellers in the Sunshine Coast between June and August 2007.

Traveller Segment	Travellers in the Sunshine Coast in June, July and August 2007	
	Volume	Percent of Total Volume
Resident Regional Travellers <sup>1</sup>	6,341	1.8%
Exiting Travellers	342,977	98.2%
Residents <sup>2</sup>	16,675	4.8%
Non-Residents	326,302	93.4%
<b>Grand Total</b>	<b>349,318</b>	<b>100.0%</b>

1. Includes residents of the Upper and Lower Sunshine Coast who travelled to the other region using the Saltery Bay/Earls Cove BC Ferries terminals and who did not exit the Sunshine Coast.

2. Includes residents of the Lower Sunshine Coast who exited the Upper Sunshine Coast (via Westview BC Ferries terminal) and residents of the Upper Sunshine Coast who exited the Lower Sunshine Coast (via Langdale BC Ferries terminal).

Approximately \$77.6 million dollars were spent in the Sunshine Coast region by travellers who exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals (Table ES2). Overnight non-business travellers accounted for 69% of all travellers and 78% of all traveller expenditures. Business travellers accounted for 18% of traveller volume and were responsible for 20% of traveller revenues.

Table ES2. The number of exiting travellers and their expenditures in the Sunshine Coast between June and August 2007.

Exiting Travellers	Travellers in the Sunshine Coast in June, July and August 2007 exiting the region by the Westview or Langdale BC Ferries terminals			
	Volume	Percent of Total Volume	Expenditures in the Sunshine Coast	Percent of Total Expenditures
Overnight Non-Business Travellers	236,497	69.0%	\$60,637,089	78.1%
Non-Business Day Trippers	30,882	9.0%	\$1,198,453	1.5%
Business Travellers	61,680	18.0%	\$15,785,137	20.3%
Excluded Travellers <sup>1</sup>	13,918	4.1%	n/a	n/a
<b>Grand Total</b>	<b>342,977</b>	<b>100.0%</b>	<b>\$77,620,679</b>	<b>100.0%</b>

1. Excludes tour group travellers, respondents previously interviewed at Saltery Bay and incomplete surveys.

## Overnight Non-Business Travellers

- A majority (90%) of overnight non-business travellers to the Sunshine Coast were from Canada; 75% were residents of British Columbia and 15% were from elsewhere in Canada. The United States and Overseas visitors represented a combined 10% of overnight non-business travellers.
- Over half (56%) of Canadian travellers from outside of British Columbia were from Alberta, another third (31%) were from Ontario whereas fewer were from Quebec (6%), Saskatchewan (3%), Maritime Provinces in Eastern Canada (2%), Manitoba (1%) and the Yukon (1%). Almost half (49%) of American travellers were from Washington State, a fifth (18%) were from California whilst fewer were from Michigan (6%) or Oregon (5%).

- International travellers, other than U.S. residents, accounted for 3% of overnight non-business travellers. Over four-fifths (81%) of these travellers were European, 8% were from the Asia-Pacific and 11% were from other countries.
- The largest proportion of travellers (44%) were between 35 and 54 years old, another third (34%) were 55 years old or older and just over a fifth (22%) were under 35 years old.
- More than two-fifths (44%) of travellers were high income earners with household incomes of over \$100,000 annually. Another fifth (20%) of travellers came from households with annual incomes that were between \$65,000 and \$99,000.
- On average, there were 2.5 people per overnight non-business traveller party. Approximately 24% of these travel parties had children while the remaining 76% were adult only travel parties. Those travel parties with children were larger (3.9 people on average) than those travelling without children (2.0 people).
- Visitors to the Sunshine Coast were frequent travellers. They took an average of 7.0 leisure trips in the past year, with 44% taking six or more trips. One quarter (25%) of travellers took four or five trips, 15% took 3 trips, and another 15% of travellers took one or two leisure trips. On average, British Columbian residents reported taking more leisure trips in the previous 12 months than did non-residents (7.4 vs. 5.7 trips).
- As expected, the majority of overnight non-business travellers (71%) were visiting for leisure purposes while 28% were travelling to visit friends and family. British Columbian residents were more likely to be visiting friends and family than non-residents (29% vs. 24%) while Non-British Columbian residents had a slightly higher incidence of travelling for leisure purposes (74% vs. 70%).
- Approximately 15% of overnight non-business travellers in the Sunshine Coast did not actually have a primary destination and were touring. Two-thirds (66%) of overnight non-business travellers were primarily visiting the Sunshine Coast, 18% were visiting other locations in British Columbia and less than 1% of overnight non-business travellers had a primary destination elsewhere in Canada or in the United States.
- The most frequently mentioned accommodation used on the Sunshine Coast was with friends or relatives (29%) followed by cabin/cottage (19%) and a resort/hotel/motel (19%). Other accommodation used by visitors included campground/RV (16%), bed and breakfasts (12%) and boat/sailboat (4%).
- Over four-fifths (84%) of visitors to the Sunshine Coast used a car/truck/motorcycle as their primary mode of transportation. Other transportation mediums used by visitors included RV (7%), bus (3%), bicycle (3%) and a boat/sailboat (2%).
- The most popular primary activity for overnight non-business travellers were water (42%) or land (28%) based recreational activities. Fewer travellers indicated their primary activity was visiting friends and relatives (9%), general sightseeing (6%), shopping (2%) or culture, attractions or an event (0.4%).

- The average trip time away from home for overnight non-business travellers was 9 days, of which 7 days were spent in British Columbia and 4 days were spent in either the Upper or Lower Sunshine Coast.
- Overall, almost three-fifths (58%) of travellers indicated they could not spend any extra time in British Columbia, 1-in-4 travellers (25%) could spend at least one extra day and 17% could spend a few more hours than originally planned.
- Over two-fifths (45%) of those interviewed on the Upper Sunshine Coast had visited communities in the Comox Valley, a quarter (24%) had visited Sechelt while a fifth (19%) had visited Campbell River. Almost a third (31%) of overnight non-business travellers interviewed on the Lower Sunshine Coast spent at least 1 hour in Powell River.
- One-eighth (12%) of those interviewed the Upper Sunshine Coast had stopped at the Powell River Visitor Centre. The three most frequently cited reasons for not stopping included no need, not enough time and familiarity with the area.
- Almost a fifth (18%) of those interviewed on the Lower Sunshine Coast reported stopping at the Sechelt Visitor Centre. The three most common reasons for not stopping at the Visitor Centre included familiarity with the area, no need and passing through.
- Overall, daily expenditures were approximately \$153 per party. However, there were significant differences in daily expenditures based on traveller origin, purpose of trip, primary accommodation, party size and age. Travellers from the U.S. (\$302) and Canadians from outside of British Columbia (\$233) spent significantly more than international travellers (\$155) or those from British Columbia (\$122). Travellers whose primary purpose was to visit friends and family spent noticeably less, with an average of \$139 than those travelling for leisure (\$160). Travellers staying in bed and breakfasts (\$300) or using hotels/motels/resorts (\$295) as their primary accommodation had higher average daily expenditures than those staying in a Campground/RV (\$129) or with friends or relatives (\$78). Average daily expenditures per party increased from \$66 for solo travellers to \$189 for two-person parties and back down to \$114 for parties that had between 7 or more people. Travellers between the ages of 55 and 64 had the highest daily expenditures (\$241) whereas those under 24 years old spent substantially less (\$62).

### **Non-Business Day Trippers**

- All of the day trippers (100%) were from British Columbia.
- The most popular trip purpose cited by day trippers was leisure (41%) although 37% visited friends and family and 22% percent travelled for other personal reasons.
- Almost all day trippers were destined for the Sunshine Coast (93%) although some were touring for the day (6%) and less than 1% were bound for another destination in British Columbia.
- Almost all (85%) day trippers used a car/truck/motorcycle as their primary transportation medium, although a minority did report using a bus (12%) or a bicycle (2%).
- Overall, daily expenditures for this group of visitors were approximately \$95 per party.

## **Business Travellers**

- The majority of business travellers were British Columbian residents (90%) whereas the rest were from elsewhere in Canada (5%), the United States (2%) and other international countries (2%).
- The majority of Canadian visitors from outside British Columbia were from Alberta (52%), Ontario (46%) or Quebec (2%). Over half (51%) of U.S. business travellers were from Washington, over 34% were from Oregon and 15% were from other states that included Florida, Nevada and New York.
- Travellers from countries other than the U.S. were all from Europe (England and Germany) and accounted for 2% of all business travellers.
- The average trip length for business travellers who stayed overnight was 4 days away from home, of which most were spent in British Columbia.
- Trip length was noticeably different based on the origin of the business traveller. Canadian business travellers (other than British Columbian residents) were away from home for an average of almost 8 days and spent almost all of this time in British Columbia. U.S. business travellers were away from home the longest (8 days) and spent an average of over 6 days in British Columbia.
- British Columbian business travellers spent over 3 days on the Upper Sunshine Coast and almost 3 days on the Lower Sunshine Coast.
- The average daily expenditures for all business travellers while on the Sunshine Coast was \$110.

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## Section 1. Introduction

In 2005 Tourism British Columbia introduced the Community Tourism Foundations (CTF) Program®, which was designed to assist communities in developing their tourism potential. Facilitators are hired by Tourism British Columbia's Partnership Marketing division to work with selected communities to develop multi-year tourism development and marketing plans. Research & Planning, Tourism British Columbia assists Facilitators by providing some funding and guidance for research projects to support the CTF program. A lack of current information available about visitors to the Sunshine Coast led Research & Planning, Tourism British Columbia to determine that the region would benefit from a comprehensive visitor study in the summer of 2007. Information from this visitor study will help develop a research based tourism plan for the Sunshine Coast region.

In 2001, Research & Planning, Tourism British Columbia started the Value of the Visitor Centre program. The program uses visitor survey methodology to measure the economic impact of Visitor Centres in British Columbia. Since then, 24 independent studies have been conducted to evaluate the impact of the 22 different Visitor Centres. In the summer of 2007 Tourism British Columbia undertook a "*Value of the Visitor Centre*" project with the Powell River Visitor Centre. Because of similar objectives, proven methodology and efficiencies created, the Powell River Visitor Centre study was included as part of the Sunshine Coast Visitor Study.

The purpose of the Sunshine Coast Visitor Study was to develop a visitor profile of travellers to the Sunshine Coast region and to measure the value of Powell River's Visitor Centre.

Specifically, the study objectives were:

1. To profile travellers who visit the Sunshine Coast in terms of traveller and trip characteristics.
2. To estimate visitor volume and tourism expenditures of travellers exiting the Sunshine Coast by the Westview or Langdale BC Ferries terminals during June – August 2007.
3. To profile users of the Powell River Visitor Centre in terms of traveller and trip characteristics.
4. To estimate the influence of the Powell River Visitor Centre on the decision-making process of travellers in British Columbia, on the length of stay, expenditures, and selection of additional or alternative activities, attractions or destinations.

Two reports were generated from this visitor study. This report outlines the general visitor study results. A second report entitled, "*The Value of the Powell River Visitor Centre*" outlines characteristics of the travellers that use the Visitor Centre and the value the Visitor Centre brings to Powell River and British Columbia. The Value of the Visitor Centre report is available from Research & Planning, Tourism British Columbia under a separate cover.

## Section 2. Methodology

To fulfill the multiple objectives of this study information was collected using a number of methods and data sources. Information was collected from:

- Administrative data from BC Ferries,
- Exit surveys from the Sunshine Coast at the Westview (Upper Sunshine Coast to Vancouver Island (Courtenay/Comox)), and Langdale (Lower Sunshine Coast to West Vancouver (Horseshoe Bay)) ferry terminals,
- Other on-site interviews conducted at the Powell River Visitor Centre and Saltery Bay ferry terminal, and
- A comprehensive mailback questionnaire.

How data was collected and used (analyzed) for each of the above data sources is described in the following section.

### 2.1 Data Collection

#### Administrative Data Collection

BC Ferries provided embarking (departing) passenger count information for June, July and August 2007. BC Ferries passenger counts were provided for the Westview, Langdale and Saltery Bay ferry terminals.

#### Visitor Survey - On-Site Interviews

A multi-location, two-stage survey design was used to examine the characteristics of travellers to the Sunshine Coast. The first stage consisted of exit surveys of travellers departing from the Westview and Langdale BC Ferries terminals and other on-site interviews at the Powell River Visitor Centre and the Saltery Bay ferry terminal in order to obtain information about the typical traveller to the Sunshine Coast region (Figure 1).

The second stage, the mailback questionnaire, collected information from travellers after their trip. The purpose of the mailback questionnaire was to gather information about trip planning, experiences and activities in order to understand travellers' perceptions of the Sunshine Coast region and British Columbia upon trip completion.

Due to the multiple objectives of this project, there were two main streams of survey data collected. Information to fulfill objectives one and two (to collect general traveller characteristics and to estimate visitor volume and expenditures) of this project was collected at the Westview and Langdale BC Ferries terminals. Information collected to fulfill objectives three and four (to profile users of the Visitor Centre and to determine the Value of the Visitor Centre) was collected at the Powell River Visitor Centre and two reference sites, the Westview and Saltery Bay BC Ferries terminals. This report outlines the results of the general visitor survey results collected through the on-site interviews at the Westview and Langdale BC Ferries terminals. Results from the Value of the Visitor Centre project are available under a separate cover from Research & Planning, Tourism British Columbia. The survey data collected at the Westview BC Ferry terminal is included in both reports.

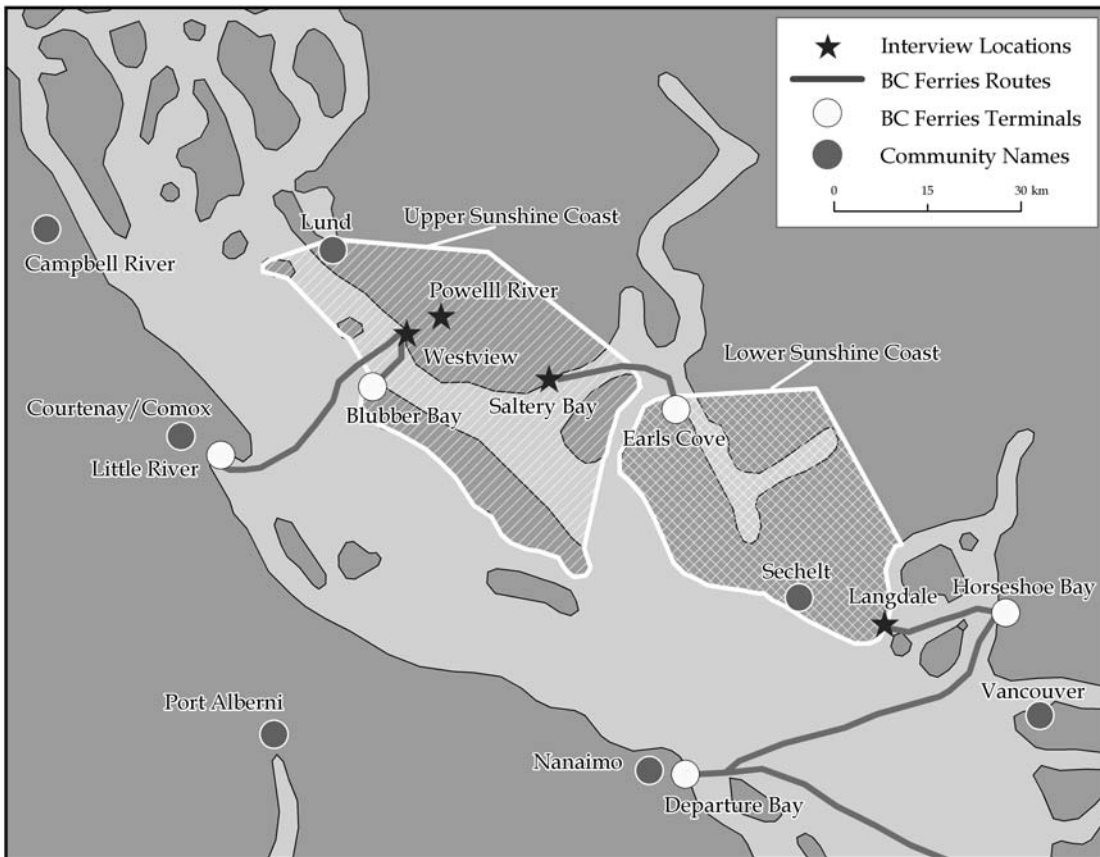


Figure 1. Locations of on-site interviews conducted in the Sunshine Coast.

Two teams of two interviewers collected data between June 8 and August 31, 2007. For the Upper Sunshine Coast team, the interviewers' schedule consisted of a systematic sample of four continuous days of interviewing followed by two days off. Each day of interviewing, the two interviewers rotated between the different interview sites (Powell River Visitor Centre, Westview and Saltery Bay BC Ferries terminals). For the Lower Sunshine Coast team, the interviewers' schedule consisted of four days of work, followed by two days off. In the scheduled days of work, two days consisted of a systematic sample of interviewing at the Langdale BC Ferries terminal and on the two remaining days the research team worked on another project. The interview dates and number of interviews conducted are detailed in Appendix A.

Potential respondents were randomly selected at each location through systematic random sampling at the interview site. Respondents were asked if they were willing to participate in an eight to ten minute interview and were given a *Super, Natural British Columbia*® refrigerator magnet for their time, if they agreed to participate. Respondents were then asked if they were residents of the Upper Sunshine Coast region at the Westview ferry terminal (including the area south of Lund and north of Saltery Bay, including surrounding islands of Savary, Texada and Nelson Islands) or the Lower Sunshine Coast region at the Langdale ferry terminal (including the area south of Egmont and north of Port Mellon). If so, they were eliminated from the remainder of the interview, ensuring that only non-resident travellers were interviewed. In order to meet the objectives of the visitor study, an abbreviated interview was designed for day trip visitors and business travellers. The interviewers recorded responses on handheld computers (Palm Pilots) using Techneos Data Entryware software.

During the general survey interview, questions were asked about (interview questionnaires are available in Appendix B):

- traveller demographics,
- primary trip purpose,
- primary destination,
- other communities visited during their trip,
- primary mode of transportation,
- trip duration,
- length of stay in the Sunshine Coast region and in British Columbia,
- primary accommodation,
- primary leisure activity,
- daily expenditures, and
- trip flexibility.

Between June 8<sup>th</sup> and August 31<sup>st</sup>, 2007, a total of 2,236 people were approached at BC Ferries' terminals at Westview and Langdale. Of those, 831 were excluded because they were from the local area and 78 of the eligible non-residents chose not to participate in the survey resulting in a total of 1,327 respondents. Further exclusions were made to remove those that were part of a tour group (18), had been previously interviewed (12) or those that did not complete the survey (3). As a result, a grand total of 1,294 useable traveller surveys were completed; 575 (44.4%) respondents completed their survey at the Westview ferry terminal and 719 respondents completed their survey at the Langdale ferry terminal (55.6%, Table 1).

Table 1. Overall visitor survey intercept results.

Location <sup>1</sup>	Travellers Approached	From Local Community <sup>2,3</sup>	Eligible for Interview	Agreed to Interview	Part of Tour Group	Other Exclusions <sup>4,5</sup>	Useable Traveller Surveys
Westview	1,134	519	615	578	0	3	575 (44.4%)
Langdale	1,102	312	790	749	18	12	719 (55.6%)
<b>Grand Total</b>	<b>2,236</b>	<b>831</b>	<b>1,405</b>	<b>1,327</b>	<b>18</b>	<b>15</b>	<b>1,294 (100.0%)</b>

1. Two exit surveys were used in this study: Upper Sunshine Coast - Vancouver Island (Courtenay/Comox), via Westview ferry terminal; and Lower Sunshine Coast - West Vancouver (Horseshoe Bay), via the Langdale ferry terminal.

2. The Upper Sunshine Coast region is defined as the area south of Lund and north of Saltery Bay, including surrounding islands of Savary, Texada and Nelson Islands.

3. The Lower Sunshine Coast is defined as the area south of Egmont and north of Port Mellon.

4. Excludes 2 incomplete surveys and 1 survey completed by a respondent who had already been interviewed on a prior trip.

5. Excludes travellers that were interviewed at Saltery Bay (n=11) and 1 incomplete survey amongst Langdale respondents.

## 2.2 Data Analysis

The volume of travellers to the Sunshine Coast was calculated using administrative data collected from BC Ferries. The exit surveys conducted at each site were weighted or 'balanced' using this administrative passenger data. The data was weighted to ensure the data collected was representative of travellers exiting the Sunshine Coast by the Westview or Langdale BC Ferries terminals during the summer of 2007. The data is not representative of travellers departing the Sunshine Coast by private boats, floatplanes or airplanes. See Appendix C for detailed weighting methods.

Travellers to the Sunshine Coast were described using simple frequencies and averages from the interview survey data collected in 2007. Analysis of the mailback survey data collected was planned but due to an insufficient number of completed questionnaires analysis was not performed and therefore is not included in this report.

## Section 3. Overview of Results

The results of the study have been segmented by type of traveller to the Sunshine Coast region. The following sections of the report are organized by those traveller segments including: overnight non-business travellers, non-business day trip travellers and business travellers. As discussed in the methods section of this report, there is a varying amount of information available for each of the segments of this report.

Overall, between June 8 and August 31 of 2007 it was estimated that about 349,000 travellers visited the Sunshine Coast (Table 2). Of the travellers who visited the Sunshine Coast in the study period: 98% or nearly 343,000 travellers exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals and 2% or 6,300 travellers were resident regional travellers.

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1. Includes residents of the Upper and Lower Sunshine Coast who travelled to the other region using the Saltery Bay/Earls Cove BC Ferries terminals and who did not exit the Sunshine Coast.

2. Includes residents of the Lower Sunshine Coast who exited the Upper Sunshine Coast (via Westview BC Ferries terminal) and residents of the Upper Sunshine Coast who exited the Lower Sunshine Coast (via Langdale BC Ferries terminal).

Approximately \$77.6 million dollars were spent in the Sunshine Coast region by travellers who exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals (Table 3). Overnight non-business travellers accounted for 69% of all travellers and 78% of all traveller expenditures. Business travellers accounted for 18% of traveller volume and were responsible for 20% of traveller revenues.

Table 3. The number of exiting travellers and their expenditures in the Sunshine Coast between June and August 2007.

	<b>Travellers in the Sunshine Coast in June, July and August 2007 exiting the region by the Westview or Langdale BC Ferries terminals</b>			
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Overnight Non-Business Travellers	236,497	69.0%	\$60,637,089	78.1%
Non-Business Day Trippers	30,882	9.0%	\$1,198,453	1.5%
Business Travellers	61,680	18.0%	\$15,785,137	20.3%
<i>Excluded Travellers</i> <sup>1</sup>	13,918	4.1%	<i>n/a</i>	<i>n/a</i>
<b>Grand Total</b>	<b>342,977</b>	<b>100.0%</b>	<b>\$77,620,679</b>	<b>100.0%</b>

1. Excludes tour group travellers, respondents previously interviewed at Saltery Bay and incomplete surveys.

Using the weighted data, 90% of the traveller volume was from the Langdale BC Ferries terminal; therefore results for the 'Overall' (or combined) Sunshine Coast will be most reflective of these respondents. Where appropriate, tables and figures have segmented the interview locations to highlight differences between the Upper and Lower Sunshine Coast respondents.

## Section 4. Overnight Non-Business Travellers

Overnight non-business travellers were those visiting the Sunshine Coast region for leisure purposes and those who were visiting family and friends. They comprised 69% of all travellers who visited the Sunshine Coast and spent \$60.6 million dollars. This section provides insights into the demographics, traveller and trip characteristics and expenditures of these overnight non-business travellers.

### 4.1 Demographics and Traveller Characteristics

#### Origin

A majority (90%) of overnight non-business travellers to the Sunshine Coast were from Canada; 75% were residents of British Columbia and 15% were from elsewhere in Canada. The United States and Overseas visitors represented a combined 10% of overnight non-business travellers. This was reflective of the origin of visitors to the Lower Sunshine Coast. In contrast, there were fewer Canadians and more visitors from the United States and Overseas on the Upper Sunshine Coast (Table 4).

There was no noticeable difference in the market origin of Canadian travellers interviewed on the Upper and Lower Sunshine Coast. Over half (56%) of Canadian travellers from outside of British Columbia were from Alberta, another third (31%) were from Ontario whereas fewer were from Quebec (6%), Saskatchewan (3%), Maritime Provinces in Eastern Canada (2%), Manitoba (1%) and the Yukon (1%; Figure 2). Almost half (49%) of American travellers were from Washington State, a fifth (18%) were from California whilst fewer were from Michigan (6%) or Oregon (5%; Figure 3). There were noticeably more travellers from Washington State at the Lower Sunshine Coast. The remaining fifth (22%) of U.S. residents were from eighteen 'other' states. A list of these states with their percentages can be found in Appendix D.

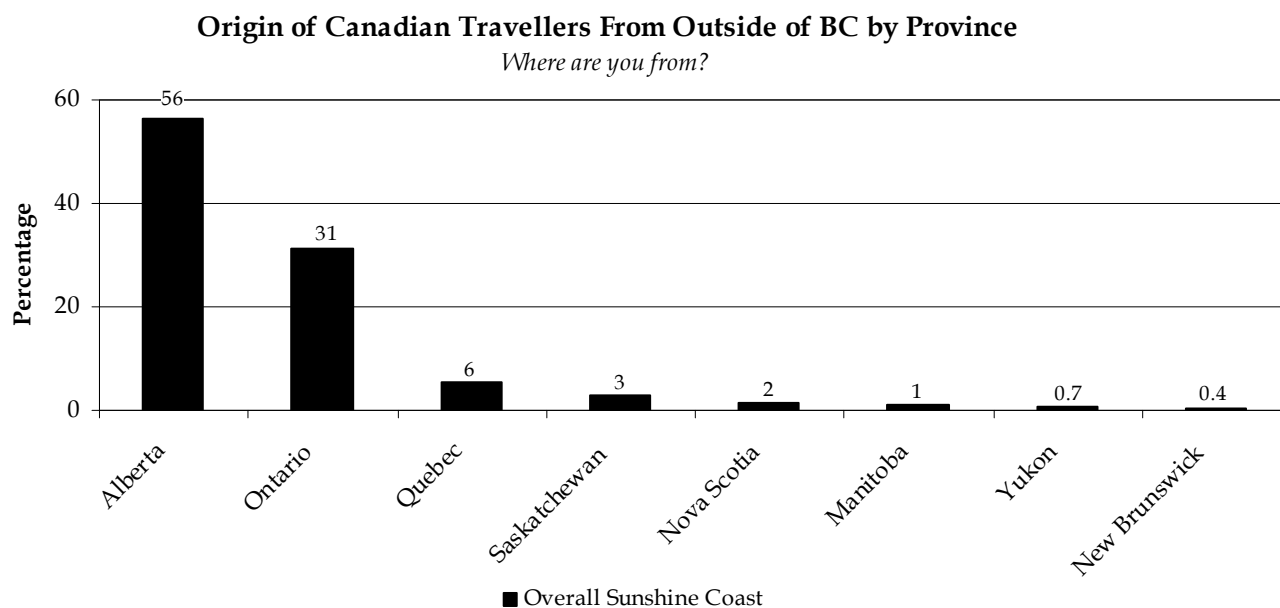


Figure 2. Other Canadian overnight non-business travellers by province to the Sunshine Coast.



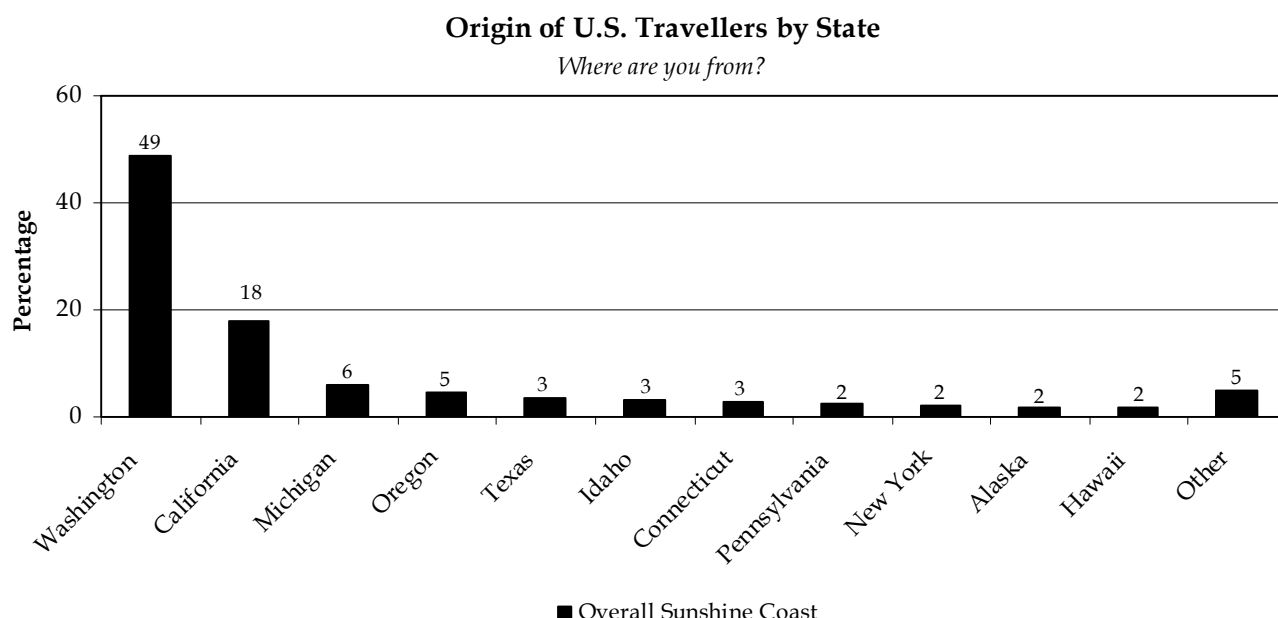


Figure 3. United States overnight non-business travellers by state to the Sunshine Coast.

Other U.S. states mentioned included Arizona, Colorado, Florida, Louisiana, Minnesota, Montana, New Mexico, Ohio, Tennessee, Vermont and Virginia.

International travellers, other than U.S. residents, accounted for 3% of overnight non-business travellers. Over four-fifths (81%) of these travellers were European, 8% were from the Asia-Pacific and 11% were from other countries. More specifically, almost two-thirds of overseas travellers were from the United Kingdom (34%) or Germany (31%).

## Age

The largest proportion of travellers (44%) were between 35 and 54 years old, another third (34%) were 55 years old or older and just over a fifth (22%) were under 35 years old. Upper Sunshine Coast respondents were generally older. There was a noticeably higher proportion of travellers 45 years or older amongst those interviewed on the Upper Sunshine Coast compared to respondents from the Lower Sunshine Coast (70% vs. 59%, Table 4).

## Education

Overnight non-business travellers to the Sunshine Coast were highly educated. Over half (50%) had at least one university degree (37%) or more, such as a Masters or a PhD (13%). Over a quarter (28%) had a college or technical diploma (15%) or some technical, college or university education (13%). Another fifth (19%) had completed a high school diploma. Comparing the two respondent groups, a higher proportion of Lower Sunshine Coast respondents were university graduates (51% vs. 45%) whereas a higher proportion of those interviewed on the Upper Sunshine Coast were college graduates (23% vs. 15%, Table 4).

## Income

More than two-fifths (44%) of travellers were high income earners with household incomes of over \$100,000 annually. Another fifth (20%) of travellers came from households with annual incomes that were between \$65,000 and \$99,000. Comparing the two respondent groups, a higher proportion of

Lower Sunshine Coast respondents earned \$100,000 or more annually than did those interviewed on the Upper Sunshine Coast (45% vs. 34%, Table 4).

### **Travel Party Size**

On average, there were 2.5 people per overnight non-business traveller party. Approximately 24% of these travel parties had children while the remaining 76% were adult only travel parties. Those travel parties with children were larger (3.9 people on average) than those travelling without children (2.0 people). There were no noticeable differences between the two respondent groups (Table 4).

### **Frequency of Travel**

Visitors to the Sunshine Coast were frequent travellers. They took an average of 7.0 leisure trips in the past year, with 43% taking six or more trips. One quarter (25%) of travellers took four or five trips, 15% took 3 trips, and another 15% of travellers took one or two leisure trips. On average, respondents interviewed on the Lower Sunshine Coast took more leisure trips annually (7.1) than did their Upper Sunshine Coast counterparts (5.2). A noticeably higher proportion of Lower Sunshine Coast travellers took 6 or more leisure trips annually compared to those interviewed at the Upper Sunshine Coast (46% vs. 29%, Figure 4).

On average, British Columbian residents reported taking more leisure trips in the previous 12 months than did non-residents (7.4 vs. 5.7 trips). However, the distribution of leisure trips taken in the last year was fairly similar between British Columbian residents and non-residents (Figure 5). On average, British Columbian residents interviewed on the Upper Sunshine Coast took more leisure trips annually than did their non-resident counterparts (5.7 vs. 4.1 trips), and twice as many British Columbian residents compared to non-residents took 6 or more leisure trips annually (34% vs. 17%, Figure 6). Similarly, British Columbian residents interviewed on the Lower Sunshine Coast took, on average, more leisure trips annually (7.5 vs. 5.9) than did their non-resident counterparts but the distribution of leisure trips taken annually was fairly similar between both groups (Figure 7).

Table 4. Overnight non-business traveller demographics.

	Overall Sunshine Coast <sup>1, 2</sup>	Upper Sunshine Coast <sup>1, 2</sup>	Lower Sunshine Coast <sup>1, 2</sup>
<b>Origin</b>			
British Columbia	75.2%	69.7%	75.8%
Other Canada	15.2%	12.5%	15.5%
United States	6.5%	8.8%	6.2%
Overseas	3.1%	9.0%	2.5%
<b>Age</b>			
Under 24 Years	5.4%	3.4%	5.6%
25-34 Years	16.3%	11.5%	16.8%
35-44 Years	18.5%	14.7%	19.0%
45-54 Years	25.3%	30.4%	24.7%
55-64 Years	18.7%	23.1%	18.2%
65 Years or Older	15.8%	16.9%	15.7%
<b>Education</b>			
Less Than High School	1.7%	2.5% <sup>3</sup>	1.6% <sup>3</sup>
High School	19.3%	18.8%	19.4%
Some Technical, College or University	13.1%	10.4%	13.4%
College of Technical Diploma	15.4%	23.2%	14.5%
University Degree	37.1%	27.7%	38.1%
Masters or a PhD Degree	13.4%	16.9%	13.0%
Other <sup>4</sup>	0.0% <sup>3</sup>	0.5% <sup>3</sup>	0.0% <sup>3</sup>
<b>Income</b>			
Less than \$25,000	4.6%	4.5%	4.6%
\$25,000 to \$49,999	15.1%	17.7%	14.9%
\$50,000 to \$64,999	16.2%	14.6%	16.3%
\$65,000 to \$99,999	20.2%	28.8%	19.5%
\$100,000 to \$149,999	20.2%	19.9%	20.2%
\$150,000 or More	23.7%	14.4%	24.5%
<b>Party Size</b>			
Average Party Size-Total	2.45	2.45	2.45
Average Party Size-Parties without children	1.99	2.02	1.99
Proportion with Children	24.2%	25.7%	24.1%
Average Party Size with children	3.87	3.67	3.89

1. The total sample size n does not always equal the number of useable surveys presented in Table 3 because some respondents did not complete the full interview.

2. Don't Know's and No Responses were excluded.

3. Findings should be interpreted with caution as unweighted sample size is less than 10.

4. 'Other' includes professional designation and various certifications.

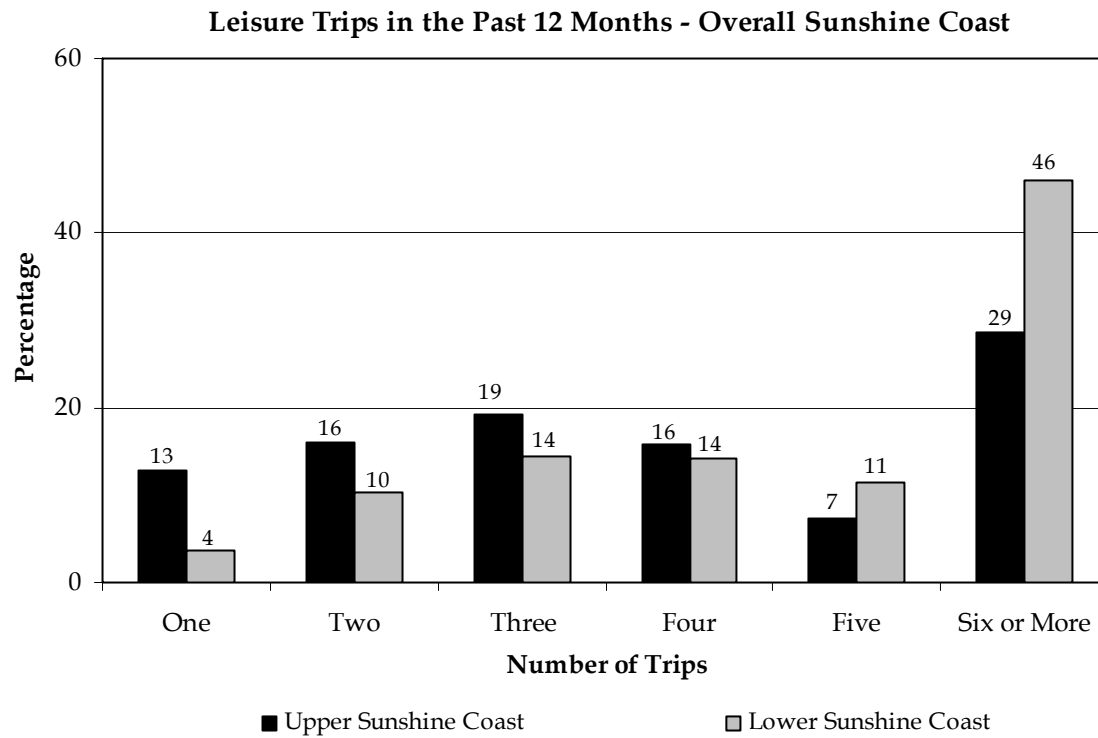


Figure 4. Overnight non-business travellers number of leisure trips in the past year.

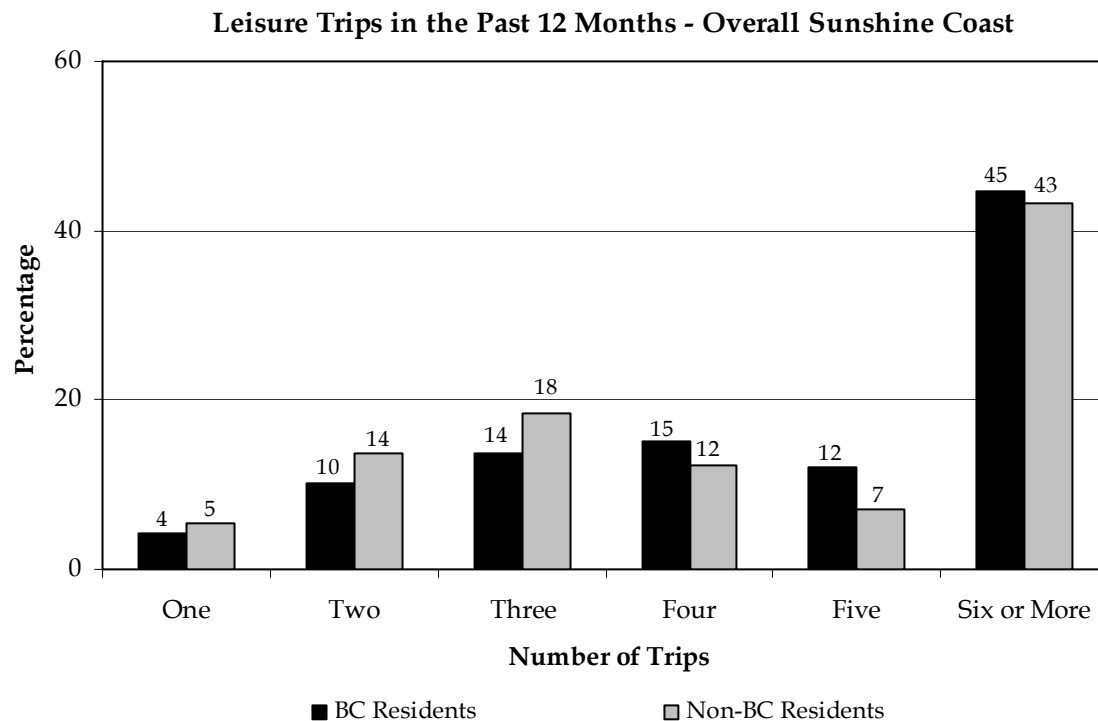


Figure 5. Overnight non-business travellers number of leisure trips in the past year for British Columbian residents and Non-British Columbian residents.

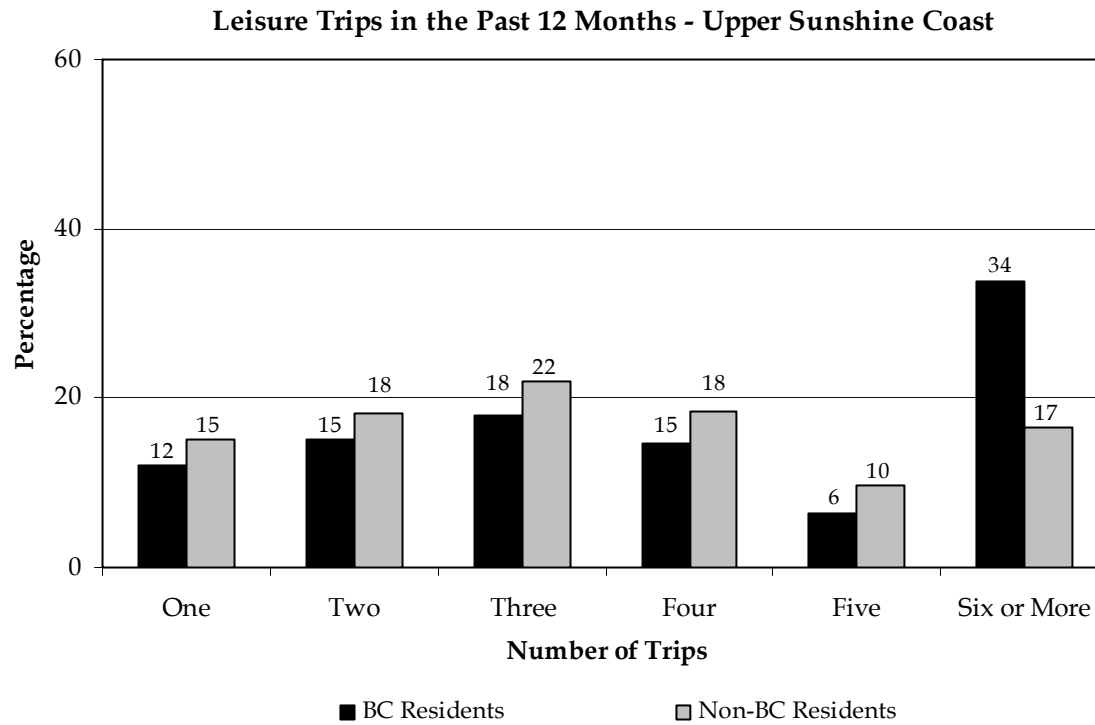


Figure 6. Upper Sunshine Coast overnight non-business travellers number of leisure trips in the past year for British Columbian residents and Non-British Columbian residents.

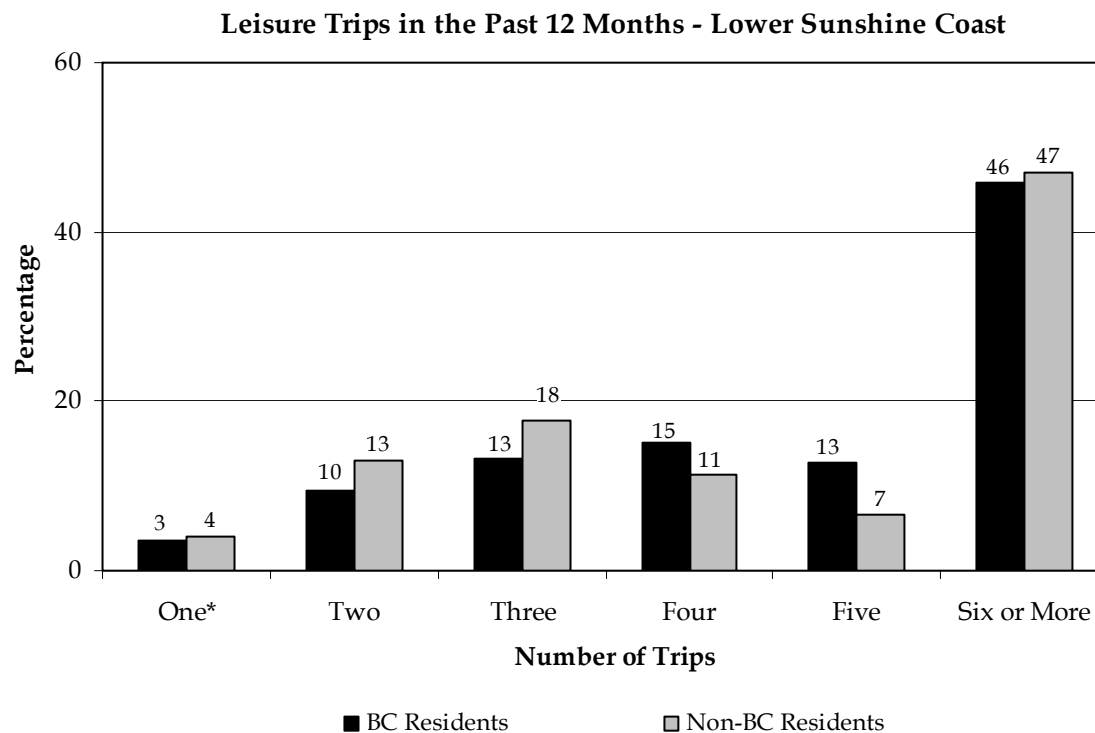


Figure 7. Lower Sunshine Coast overnight non-business travellers number of leisure trips in the past year for British Columbian residents and Non-British Columbian residents.

\*Findings should be interpreted with caution as unweighted sample size is less than 10.

## **4.2 Trip Characteristics**

This sub-section explores the trip characteristics of overnight non-business travellers to the Sunshine Coast including trip purpose, primary destination, type of accommodation, mode of transportation, trip activities, trip length, trip flexibility and the communities visited on their trip to the Sunshine Coast.

### **Trip Purpose**

As expected, the majority of overnight non-business travellers (71%) were visiting for leisure purposes while 28% were travelling to visit friends and family (Table 5). British Columbian residents were more likely to be visiting friends and family than non-residents (29% vs. 25%) while Non-British Columbian residents had a slightly higher incidence of travelling for leisure purposes (74% vs. 70%). In comparing respondents from the two areas, visitors interviewed on the Lower Sunshine Coast were noticeably more likely to be travelling for leisure (72% vs. 57%) whereas those interviewed on the Upper Sunshine Coast were likelier to be travelling to visit family and friends (41% vs. 26%, Table 5).

### **Primary Destination**

Approximately 15% of overnight non-business travellers in the Sunshine Coast did not actually have a primary destination and were touring. Two-thirds (66%) of overnight non-business travellers were primarily visiting the Sunshine Coast, 18% were visiting other locations in British Columbia and less than 1% of overnight non-business travellers had a primary destination elsewhere in Canada or in the United States. In comparing respondents from the two areas, the Sunshine Coast was cited noticeably more frequently as a primary destination by those interviewed at the Lower Sunshine Coast (68% vs. 51%) whereas those interviewed at the Upper Sunshine Coast were apparently more likely to cite primary destinations that were elsewhere in British Columbia (28% vs. 17%, Table 5).

### **Type of Accommodation**

The most frequently mentioned accommodation used on the Sunshine Coast was with friends or relatives (29%) followed by cabin/cottage (19%) and a resort/hotel/motel (19%). Other accommodation used by visitors included campground/RV (16%), bed and breakfasts (12%) and boat/sailboat (4%). Compared to those interviewed on the Lower Sunshine Coast, respondents on the Upper Sunshine Coast were noticeably more likely to stay with family and friends (41% vs. 28%) and at a resort/hotel/motel (30% vs. 18%). On the other hand, Lower Sunshine Coast respondents were apparently more likely to have stayed in a cabin/cottage than were their counterparts interviewed on the Upper Sunshine Coast (21% vs. 5%, Table 5).

### **Mode of Transportation**

Over four-fifths (84%) of visitors to the Sunshine Coast used a car/truck/motorcycle as their primary mode of transportation. Other transportation mediums used by visitors included RV (7%), bus (3%), bicycle (3%) and a boat/sailboat (2%). A noticeably higher proportion of Upper Sunshine Coast respondents used a car/truck/motorcycle than did those interviewed at the Lower Sunshine Coast (99% vs. 82%, Table 5). The results are biased towards vehicles as the main mode of transportation due to the method of how respondents were approached to participate in the survey (in the vehicle line-ups at the BC Ferries terminals).

Table 5. Trip characteristics of overnight non-business travellers to the Sunshine Coast.

	Overall Sunshine Coast <sup>1,2</sup>	Upper Sunshine Coast <sup>1,2</sup>	Lower Sunshine Coast <sup>1,2</sup>
<b>Trip Purpose</b>			
Leisure	70.9%	56.7%	72.4%
Visiting Friends & Family	27.8%	41.8%	26.3%
Other <sup>3</sup>	1.4%	1.5%	1.3% <sup>4</sup>
<b>Primary Destination</b>			
None - Touring	14.7%	19.5%	14.2%
The Sunshine Coast	66.4%	51.3%	68.0%
Other British Columbia	17.9%	28.4%	16.7%
Other Canada	0.3% <sup>4</sup>	0.8% <sup>4</sup>	0.2% <sup>4</sup>
United States	0.8% <sup>4</sup>	0.0% <sup>4</sup>	0.8% <sup>4</sup>
<b>Accommodation</b>			
Resort/Hotel/Motel	19.2%	30.2%	18.1%
Campground/RV	15.6%	12.4%	15.9%
Friends or Relatives	29.2%	40.5%	28.0%
Boat/Sailboat	3.7%	1.7% <sup>4</sup>	3.9%
Bed and Breakfast	12.1%	5.2%	12.9%
Cabin/Cottage	19.3%	5.4%	20.7%
Other <sup>5</sup>	0.9%	4.6%	0.5% <sup>4</sup>
<b>Transportation</b>			
Car/Truck/Motorcycle	84.3%	99.0%	82.8%
RV	6.8%	0.5% <sup>4</sup>	7.5%
Bus	2.9%	0.0% <sup>4</sup>	3.2%
Bicycle	2.5%	0.0% <sup>4</sup>	2.8%
Boat/Sailboat	1.5%	0.3% <sup>4</sup>	1.7%
Other <sup>6</sup>	1.9% <sup>4</sup>	0.3% <sup>4</sup>	2.1% <sup>4</sup>
<b>Primary Activity</b>			
Water Based Recreation	42.4%	28.2%	45.3%
Land Based Recreation	28.0%	18.6%	29.9%
Visiting Friends & Family	8.6%	18.6%	6.5%
General Sightseeing	6.4%	13.9%	4.8%
Shopping	1.7%	4.1%	1.2% <sup>4</sup>
Culture/Attractions/Events	0.4% <sup>4</sup>	2.5% <sup>4</sup>	0.0% <sup>4</sup>
Other <sup>7</sup>	12.5%	14.1%	12.2%
<b>Trip Length</b>			
Average Length of Entire Trip	9 Days	10 Days	8 Days
Average Length of Trip in British Columbia	7 Days	9 Days	7 Days
Average Length in Region	n/a <sup>8</sup>	4 Days	4 Days

1. The total sample size n does not always equal the number of useable surveys presented in Table 3 because some respondents did not complete the full interview.

2. Don't Know's and No Responses were excluded.

3. 'Other' includes brought boat to buyers, building house, cabin, getting truck, looking for retirement property, looking for real estate, researching B&B's for ideas for their B&B and swim meet.

4. Findings should be interpreted with caution as unweighted sample size is less than 10.

5. 'Other' includes car, condo, house, mixture of all, own house, own place, private property, rental house, summer home, tent, vacation home, vacation property and vehicle.

6. 'Other' includes friend picked him up, flight, ATV, hitchhiking, car and boat, bus and private boat and didn't need any.

7. 'Other' includes art class, boat tour, building bike trails, building cabin/cottage, carving, coffee, cottaging, curling, Desolation Sound cruise, dining, drinking, driving friend, eating, gardening, house hunting, housework, staying overnight, looking for property, painting, picnic, playing pool, rest and relaxation, reading, sleeping, touring, working on boat/house/summer property and yoga.

8. Respondents were not asked their total length of stay on the Sunshine Coast but were asked about the time spent on the Upper and Lower Sunshine Coast.

## **Trip Activities**

The most popular primary activity for overnight non-business travellers was water based recreation (42%) which included spending time at the beach, boating, canoeing, diving, fishing, kayaking, lake activities, resort activities, sail boating, sailing, skim boarding, swimming, water skiing and water sports. Also popular with over a quarter of all respondents (28%) were land based recreational activities such as biking, camping, cycling, golf, hiking, walking and general outdoor activities.

Compared to Upper Sunshine Coast respondents, a noticeably higher proportion of those interviewed on the Lower Sunshine Coast participated in recreation that was water (45% vs. 28%) or land (30% vs. 19%) based. The top three water based activities participated in by Upper Sunshine Coast visitors included spending time at the beach, boating and swimming whereas the top three activities mentioned by those interviewed at the Lower Sunshine Coast included fishing, kayaking and canoeing. The top three land based activities participated in by Upper Sunshine Coast visitors included walking, hiking and camping whereas the top three activities mentioned by those interviewed at the Lower Sunshine Coast included golfing, hiking and biking.

Fewer travellers indicated their primary activity was visiting friends and relatives (9%), general sightseeing (6%), shopping (2%) or culture, attractions or an event (0.4%). Upper Sunshine Coast respondents were more likely to have made the trip to visit family/friends than were those interviewed on the Lower Sunshine Coast (19% vs. 7%, Table 5).

## **Trip Length**

The average trip time away from home for overnight non-business travellers was 9 days, of which 7 days were spent in British Columbia and 4 days were spent in either the Upper or Lower Sunshine Coast (Table 5). Compared to Lower Sunshine Coast respondents, those interviewed on the Upper Sunshine Coast spent, on average, more time away from home (10 vs. 8 days) and in British Columbia (9 vs. 7 days, Table 5). Trip length was significantly different depending on the origin of the traveller. As expected, overseas travellers were away from home the longest (over 18 days) and on average spent 16 days in British Columbia and 3 days in the Upper Sunshine Coast or 5 days on the Lower Sunshine Coast. U.S. travellers were away from home for over 9 days and on average spent 7 days in British Columbia with almost 6 days on the Upper Sunshine Coast or 2 days on the Lower Sunshine Coast respectively for those who spent time at these locations. Canadian travellers (other than British Columbian residents) were away from home and in British Columbia for approximately 1.5 weeks, and depending on where they were interviewed, spent almost 4 days in the Upper Sunshine Coast or about 3 days in the Lower Sunshine Coast (Table 6).



Table 6. Overnight non-business traveller trip length<sup>1</sup> (in days) by traveller origin - overall.

Traveller Origin	In the Upper Sunshine Coast	In the Lower Sunshine Coast	In British Columbia	Total Trip
British Columbia	4.15	3.86	5.39	5.53
Other Canada	3.75	3.03	9.26	9.90
United States of America	5.63	2.20	7.23	9.15
Other International	3.14	4.97 <sup>2</sup>	15.90	18.39
<b>Average Trip Length</b>	<b>4.14</b>	<b>3.64</b>	<b>6.39</b>	<b>6.73</b>

1. The top and bottom 2% of responses were trimmed to ensure an accurate mean of trip length.

2. Findings should be interpreted with caution as unweighted sample size is less than 10.

## Trip Flexibility

Overall, almost three-fifths (58%) of travellers indicated they could not spend any extra time in British Columbia, 1-in-4 travellers (25%) could spend at least one extra day and 17% could spend a few more hours than originally planned. In comparing respondents from the two areas, those interviewed on the Upper Sunshine Coast were noticeably more flexible in their ability to spend an extra day or days than were their counterparts interviewed in the Lower Sunshine Coast (23% vs. 16%, Table 7). If travellers could be convinced to stay longer, they will spend more money in the region and the province.

Table 7. Overnight non-business travellers trip flexibility in the Upper and Lower Sunshine Coast region and British Columbia.

Trip Flexibility	British Columbia	Upper Sunshine Coast Region	Lower Sunshine Coast Region
I can not spend any extra time at all	57.5%	58.4%	51.6%
I can spend an extra few hours (less than a day)	17.2%	18.8%	32.5%
I can spend an extra day or days	25.3%	22.7%	15.9%

## Communities Visited

Travellers were asked whether they had visited and spent time (at least 1 hour) in selected British Columbia communities or regions during their trip (Powell River, Sechelt, Comox Valley and Campbell River). Over two-fifths (45%) of those interviewed on the Upper Sunshine Coast had visited communities in the Comox Valley, a quarter (24%) had visited Sechelt while a fifth (19%) had visited Campbell River. Almost a third (31%) of overnight non-business travellers interviewed on the Lower Sunshine Coast spent at least 1 hour in Powell River (Figure 8). One-eighth (12%) of those interviewed the Upper Sunshine Coast had stopped at the Powell River Visitor Centre. The three most frequently cited reasons for not stopping included no need, not enough time and familiarity with the area. Almost a fifth (18%) of those interviewed on the Lower Sunshine Coast reported stopping at the Sechelt Visitor Centre. The three most common reasons for not stopping at the Visitor Centre included familiarity with the area, no need and passing through.

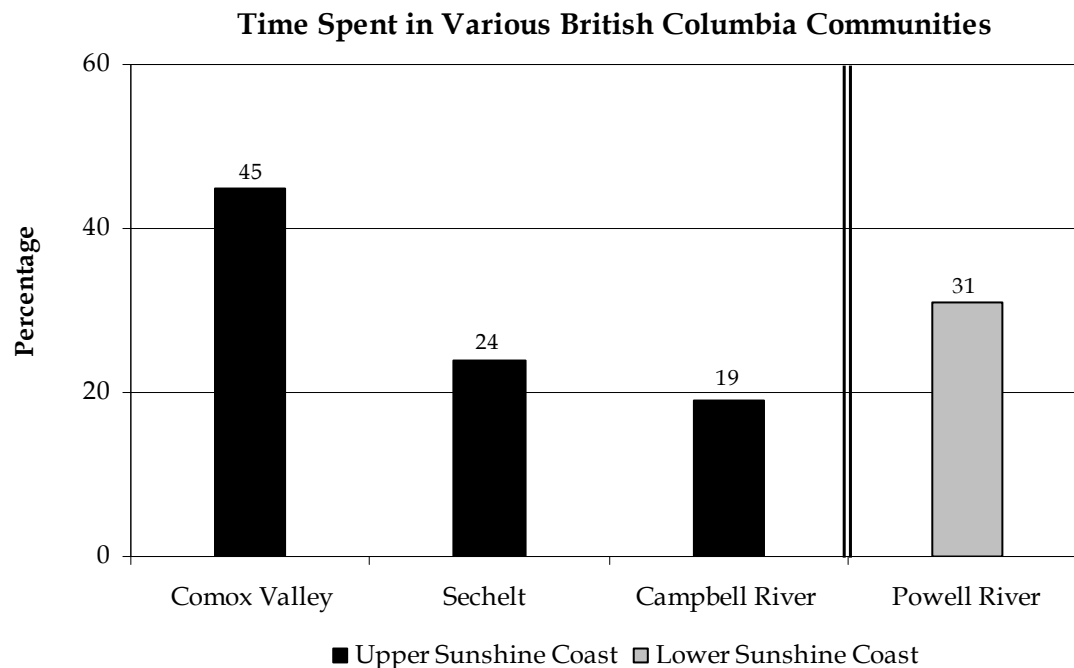


Figure 8. Overnight non-business travellers communities visited.

### 4.3 Traveller Expenditures

Travellers were asked two questions about their daily expenditures in the on-site interview, “*In Canadian dollars, what were your travel party’s total expenditures yesterday, including accommodation?*” was asked to understand and estimate expenditures on the traveller’s whole trip. To understand expenditures made by day trippers, travellers were asked, “*In Canadian dollars, what will your travel party’s total expenditures be today?*” Average daily expenditures on a traveller’s trip (referred to ‘on trip’) were summarized. Average daily expenditures of day trippers are reported in subsequent sections.

Overall, daily expenditures were approximately \$153 per party. However, there were significant differences in daily expenditures based on traveller origin, purpose of trip, primary accommodation, party size and age (Table 8).

Travellers from the U.S. (\$302) and Canadians from outside of British Columbia (\$233) spent significantly more than international travellers (\$155) or those from British Columbia (\$122). In comparing respondents from the two areas, British Columbians and international travellers (other than those from the United States) interviewed on the Upper Sunshine Coast spent more than did their counterparts interviewed on the Lower Sunshine Coast. Conversely, Canadians from outside British Columbia as well as visitors from the United States interviewed on the Lower Sunshine Coast spent substantially more than their counterparts spent on the Upper Sunshine Coast (Table 8).

As expected, those travellers whose primary purpose was to visit friends and family spent noticeably less, with an average of \$139 than those travelling for leisure (\$160). These differences were particularly pronounced amongst respondents in the Upper Sunshine Coast (\$122 vs. \$182, Table 8).

There were noticeable differences in expenditures when summarized by primary accommodation type (Table 8). Travellers staying in bed and breakfasts (\$300) or using hotels/motels/resorts (\$295) as their primary accommodation had higher average daily expenditures than those staying in a Campground/RV (\$129) or with friends or relatives (\$78). In comparing respondents from the two areas, Upper Sunshine Coast respondents staying with friends or relatives or in a cabin/cottage spent noticeably more than did those staying in the same accommodations on the Lower Sunshine Coast. On the other hand, Lower Sunshine Coast respondents who stayed at a resort/hotel/motel, campground/RV or in a bed and breakfast spent more than those using similar accommodations on the Upper Sunshine Coast (Table 8).

Average daily expenditures were highest for two-person parties. Surprisingly, per party expenditures decreased for larger party sizes. This was largely a result of larger parties (with children) that stayed with friends or relatives. Solo travellers in the Upper Sunshine Coast spent more than did solo travellers on the Lower Sunshine Coast whereas those travelling as a pair spent more on the Lower Sunshine Coast (Table 8).

There were also noteworthy differences in expenditures based upon a traveller's age. Travellers between the ages of 55 and 64 had the highest daily expenditures (\$241) whereas those under 24 years old spent substantially less (\$62). Upper Sunshine Coast travellers under the age of 45 or over the age of 64 spent more than did their counterparts on the Lower Sunshine Coast. On the other hand, Lower Sunshine Coast respondents between the ages of 45 and 64 spent much more on average than did similar aged respondents interviewed at the Upper Sunshine Coast (Table 8).

Table 8. Overnight non-business travellers average daily expenditures by primary accommodations, travel party size and age.

	Average Per Party Daily Expenditures <sup>1</sup> on Trip (\$ CDN)		
	Overall Sunshine Coast	Upper Sunshine Coast	Lower Sunshine Coast
<b>Overall</b>	<b>\$153.07</b>	<b>\$156.28</b>	<b>\$152.73</b>
<b>Origin</b>			
British Columbia	\$122.11	\$132.41	\$121.11
Other Canada	\$232.52	\$196.37	\$235.65
United States of America	\$301.59	\$223.39	\$312.81
Other International	\$154.75	\$207.56	\$135.30
<b>Purpose of Trip</b>			
Leisure	\$159.72	\$182.41	\$157.83
Visit Family and Friends	\$139.08	\$122.27	\$141.88
Other <sup>2</sup>	\$94.76	\$91.14	\$95.13 <sup>3</sup>
<b>Primary Accommodations</b>			
Resort/Hotel/Motel	\$295.35	\$241.46	\$305.74
Campground/RV	\$129.09	\$117.36	\$129.98
Friends or Relatives	\$78.46	\$112.02	\$72.99
Boat/Sailboat	\$139.50	\$64.30 <sup>3</sup>	\$142.78
Bed and Breakfast	\$299.90	\$225.73	\$303.00
Cabin/Cottage	\$59.03	\$86.34	\$58.33
Other <sup>4</sup>	\$86.04	\$124.63	\$52.17 <sup>3</sup>
<b>Travel Party Size</b>			
1 person	\$66.26	\$95.99	\$63.70
2 people	\$189.38	\$174.22	\$191.23
3-6 people	\$152.07	\$155.79	\$151.72
7 or more people	\$113.75 <sup>3</sup>	\$50.00 <sup>3</sup>	\$119.05 <sup>3</sup>
<b>Age</b>			
Under 24 Years	\$61.83	\$113.24 <sup>3</sup>	\$58.48
25-34 Years	\$100.74	\$141.13	\$97.86
35-44 Years	\$147.78	\$158.11	\$146.99
45-54 Years	\$178.37	\$163.44	\$180.40
55-64 Years	\$241.43	\$179.61	\$250.40
65 Years or Older	\$120.15	\$131.29	\$118.93

1. The top and bottom 2% of responses were trimmed to ensure accurate mean expenditures.

2. 'Other' includes brought boat to buyers, building house, cabin, getting truck, looking 4 retirement property, looking for real estate, researching B&B's for ideas for their B&B and swim meet.

3. Findings should be interpreted with caution as unweighted sample size is less than 10.

4. 'Other' includes car, condo, house, mixture of all, own house, own place, private property, rental house, summer home, tent, vacation home, vacation property and vehicle.

## Section 5. Non-Business Day Trippers

Non-business day-trippers are defined as those who visited the Sunshine Coast for purposes other than business and did not stay overnight. As expected, due to the Sunshine Coast's location, there were a moderate number of day trippers, estimated at about 30,882 (9% of qualified travellers) who spent about \$1.2 million dollars (2% of all expenditures, Table 3).

All of the day trippers (100%) were from British Columbia. The most popular trip purpose cited by day trippers was leisure (41%) although 37% visited friends and family and 22% percent travelled for other personal reasons (Table 9).

Almost all day trippers were destined for the Sunshine Coast (93%) although some were touring for the day (6%) while less than 1% were bound for another destination in British Columbia. Almost all (85%) day trippers used a car/truck/motorcycle as their primary transportation medium, although a minority did report using a bus (12%) or a bicycle (2%). Overall, daily expenditures for this group of visitors were approximately \$95 per party (Table 9).

Table 9. Trip characteristics of non-business day trippers to the Sunshine Coast.

Non-Business Day Trip Travellers to the Sunshine Coast <sup>1</sup>	Percentage
<b>Origin</b>	
British Columbia	100.0%
<b>Trip Purpose</b>	
Leisure	41.0%
Visiting Friends & Family	36.7%
Other <sup>2</sup>	22.3%
<b>Mode of Transportation</b>	
Car/Truck/MC	84.9%
Bus	11.7%
Bicycle	2.1% <sup>3</sup>
Other <sup>4</sup>	1.3% <sup>3</sup>
<b>Primary Destination</b>	
None - Touring	6.4% <sup>3</sup>
The Sunshine Coast	93.4%
Other British Columbia	0.2% <sup>3</sup>
<b>Other Communities Visited</b>	
Sechelt	0.0%
Comox Valley	25.3% <sup>3</sup>
Campbell River	4.2% <sup>3</sup>
Powell River	5.8% <sup>3</sup>
<b>Expenditures</b>	
Average Daily Expenditures	\$95.01

1. The total sample size n does not always equal the number of useable surveys presented because some respondents did not complete the full interview.

2. 'Other' responses include building a house, dropping off a package, funeral, job interview, moving, picking up child from summer camp, viewing property or viewing a home for sale.

3. Findings should be interpreted with caution as unweighted sample size is less than 10.

4. 'Other' responses include picked up by friend.

## Section 6. Business Travellers

Business travellers are respondents whose primary purpose of travel was for business. Business travellers comprised about 18% of all travellers and 20% of all expenditures on the Sunshine Coast in the summer of 2007 (Table 3). There were two distinct groups of business travellers interviewed in this study, day trippers (57%) and overnight business travellers (43%). Both business and non-business day trippers spent a day on the Sunshine Coast but on average, non-business day trippers spent a lot more money than their business counterparts (\$95 vs. \$69). Compared to overnight non-business travellers, overnight business travellers did not stay as long (4 days vs. 9 days) but spent noticeably more than overnight non-business travellers on the Sunshine Coast (\$167 vs. \$153 per party per day).

### *6.1 Demographics and Business Traveller Characteristics*

#### **Origin**

The majority of business travellers were British Columbian residents (90%) whereas the rest were from elsewhere in Canada (5%), the United States (2%) and other international countries (2%, Table 10). The majority of Canadian visitors from outside British Columbia were from Alberta (52%), Ontario (46%) or Quebec (2%). Over half (51%) of U.S. business travellers were from Washington, over 34% were from Oregon and 15% were from other states that included Florida, Nevada and New York. Travellers from countries other than the U.S. were all from Europe (England and Germany) and accounted for 2% of all business travellers.

### *6.2 Trip Characteristics*

#### **Trip Length**

The average trip length for business travellers who stayed overnight was 4 days away from home, of which most were spent in British Columbia. Trip length was noticeably different based on the origin of the business traveller (Table 11). Canadian business travellers (other than British Columbian residents) were away from home for an average of almost 8 days and spent almost all of this time in British Columbia. U.S. business travellers were away from home the longest (8 days) and spent an average of over 6 days in British Columbia. Sample sizes are too small for a meaningful analysis of international travellers or for regional analysis of origins other than those from British Columbia. British Columbian business travellers spent over 3 days on the Upper Sunshine Coast and almost 3 days on the Lower Sunshine Coast.

Table 10. Business travellers trip and traveller characteristics.

	<b>Business Day Trippers<sup>1, 2</sup></b>	<b>Overnight Business Travellers<sup>1, 2</sup></b>	<b>Overall Business Travellers<sup>1, 2</sup></b>
<b>Origin</b>			
British Columbia	100.0%	77.8%	90.4%
Other Canada <sup>3</sup>	0.0%	11.9%	5.2%
United States <sup>4</sup>	0.0%	4.9% <sup>5</sup>	2.1% <sup>5</sup>
Other International <sup>6</sup>	0.0%	5.4% <sup>5</sup>	2.3% <sup>5</sup>
<b>Trip Length<sup>7</sup></b>			
Average Length of Entire Trip	1 Day	4 Days	2 Days
Average Length of Trip in British Columbia	n/a	4 Days	4 Days
Average Length in Upper Sunshine Coast	n/a	3 Days	3 Days
Average Length in the Lower Sunshine Coast	n/a	3 Days	3 Days
<b>Average Daily Expenditures<sup>7</sup></b>	<b>\$69.17</b>	<b>\$167.38</b>	<b>\$110.14</b>

1. The total sample size n does not always equal the number of useable surveys presented because some respondents did not complete the full interview.
2. Don't Know's and No Responses were excluded.
3. Other Canadian provinces include Alberta, Ontario and Quebec.
4. U.S. states include Florida, Nevada, New York, Oregon and Washington.
5. Findings should be interpreted with caution as unweighted sample size is less than 10.
6. Other International countries include England, Germany and Scotland.
7. The top and bottom 2% of responses were trimmed to ensure an accurate mean length and expenditures.

Table 11. Overnight business travellers average trip length (in days) by traveller origin.

<b>Traveller Origin<sup>1</sup></b>	<b>In the Upper Sunshine Coast</b>	<b>In the Lower Sunshine Coast</b>	<b>In British Columbia</b>	<b>Total Trip</b>
British Columbia	3.09	2.70	3.78	3.85
Other Canada	8.81 <sup>2</sup>	3.68 <sup>2</sup>	7.35	7.77
United States of America	1.99 <sup>2</sup>	4.58 <sup>2</sup>	6.45 <sup>2</sup>	7.98 <sup>2</sup>
Other International	1.00 <sup>2</sup>	n/a	4.00 <sup>2</sup>	4.00 <sup>2</sup>
<b>Average Trip Length</b>	<b>3.27</b>	<b>2.90</b>	<b>4.25</b>	<b>4.42</b>

1. The top and bottom 2% of responses were trimmed to ensure an accurate mean length.
2. Findings should be interpreted with caution as unweighted sample size is less than 10.

## Trip Expenditures

The average daily expenditures for all business travellers while on the Sunshine Coast was \$110. Overnight Business travellers spent significantly more than did their day tripper counterparts (\$167 vs. \$69). However, there were also noticeable differences in daily expenditures based on traveller origin. Non resident British Columbia business travellers spent more than did their counterparts residing in British Columbia. Overnight business travellers from British Columbia spent almost three times as much as did British Columbian business travellers who were visiting for the day (\$161 vs. \$69). Small sample sizes limit the inferences that can be made about U.S. and other international business travellers (Table 12).

Table 12. Business travellers average daily expenditures by traveller origin

<b>Traveller Origin<sup>1</sup></b>	<b>Overall Business Travellers</b>	<b>Business Day Trippers</b>	<b>Overnight Business Travellers</b>
British Columbia	\$102.67	\$69.17	\$160.54
Other Canada	\$178.29	n/a	\$178.29
United States of America <sup>2</sup>	\$239.40	n/a	\$239.40
Other International <sup>2</sup>	\$300.00	n/a	\$300.00
<b>Average Daily Expenditures</b>	<b>\$110.14</b>	<b>\$69.17</b>	<b>\$167.38</b>

1. The top and bottom 2% of responses were trimmed to ensure an accurate mean length.

2. Findings should be interpreted with caution as unweighted sample size is less than 10.



## Section 7. Conclusions

### 1. Visitor volume and tourism expenditures:

- Overall, between June 8 and August 31 of 2007 it was estimated that about 349,000 travellers visited the Sunshine Coast.
- Of the travellers who visited the Sunshine Coast in the study period: 98% or nearly 343,000 travellers exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals and 2% or 6,300 travellers were resident regional travellers.
- Approximately \$77.6 million dollars were spent in the Sunshine Coast region by travellers who exited the Sunshine Coast by the Westview or Langdale BC Ferries terminals.
- Overnight non-business travellers accounted for 69% of all travellers and 78% of all traveller expenditures.
- Business travellers accounted for 18% of traveller volume and were responsible for 20% of traveller expenditures.
- Non-business day trippers accounted for 9% of traveller volume and were responsible for 2% of traveller expenditures.

### 2. Overnight non-business travellers:

- Were from predominantly from British Columbia (75%) or elsewhere in Canada (15%).
- Were most likely to be 45 years or older (60%).
- Were highly educated, with 51% having at least a university degree.
- Were relatively affluent, with 44% having an annual household income of \$100,000 or more.
- Were most likely to be travelling without children (76%).
- Were frequent travellers, taking an average of 7.0 leisure trips in the past year.

Trip characteristics of overnight non-business travellers showed that:

- The primary trip purpose was leisure (71%), followed by visiting friends and family (28%).
- Cars/trucks/motorcycles were the most popular mode of transportation for most travellers (84%).
- Staying with friends or relatives were the primary accommodation type for 29% of travellers, followed by hotels/motels/resorts (19%), cabins/cottages (19%) and campgrounds/RV parks (16%).
- The average time spent in the Sunshine Coast was four days.
- They spent an average of \$153 per day per party in the area.
- A high proportion of travellers (42%) participated in water based recreation which included spending time at the beach, boating, canoeing, diving, fishing, kayaking, lake activities, resort activities, sail boating, sailing, skim boarding, swimming, water skiing and water sports.
- Over a quarter of all respondents (28%) participated in land based recreational activities such as biking, camping, cycling, golf, hiking, walking and general outdoor activities.

- Further development and ongoing promotion of water and land activity offerings are vital for maintaining current visitation levels and more importantly, attracting new visitors to ensure tourism industry initiatives and offerings on the Sunshine Coast are sustainable for longer term success.
- Over two-fifths (42%) of overnight non-business travellers on the Upper Sunshine Coast and almost half (48%) of overnight non-business travellers on the Lower Sunshine Coast indicated they were somewhat flexible in their time and could spend a few extra hours or days in the region. This represents an important opportunity to extend travellers time spent in the Sunshine Coast.

3. Non-business day trippers:

- Were all British Columbia residents (100%).
- Were travelling for leisure (41%) or visiting friends and family (37%).
- Their primary destination was on the Sunshine Coast (93%).
- They travelled primarily in cars/trucks/motorcycles (85%).
- They spent on average of \$95 per party.

4. Business travellers:

- Were predominantly residents of British Columbia (90%).
- The average time spent on their trip was four days.
- They spent on average \$110 per day during their visit.
- They represent an important component of the Sunshine Coast's tourism industry. Features that enhance a business travellers experience (i.e. cell phone and internet access) should be considered during tourism development activities.

## **Section 8. Limitations**

1. These results are representative of travellers who visited the Sunshine Coast between June 8 and August 31, 2007. The results do not represent the travellers to the Sunshine Coast for the whole year. Applying these results to the remaining months in the year could over-estimate expenditures of travellers to the Sunshine Coast because the study was completed during the peak tourism period. In addition, trip and traveller characteristics of travellers at other times of the year could differ from those interviewed during the study period.
2. Some of the statistics contained within this report were produced with small sample sizes; consequently some of the results should be treated with caution.
3. Findings from similar studies in other communities in British Columbia have differed from these results; therefore, the findings presented in this report cannot be applied to other communities.
4. These estimates do not include tour group travellers, as they were excluded from the survey.
5. These estimates do not include travellers departing the Sunshine Coast by private boats, floatplanes or airplanes.

## **Section 9. Appendices**

Appendix A. Interview Schedules and Completions

Appendix B. Intercept Questionnaires

Appendix C. Overall Weighting Methods

Appendix D. Overnight non-business travellers Open-Ended Responses

## Appendix A. Interview Schedule and Completions

Table A1. Interview schedule and completion: Westview BC Ferries Terminal – June and July.

	Upper Sunshine Coast via Westview BC Ferries Terminal (June-August 2007)					
	Number of People Approached	Agree to Interview	Number of Residents	Part of Tour Group	Incomplete or Repeat Surveys	Useable Tourist Surveys
June 8	7	5	1	0	0	4
June 9	4	2	1	0	0	1
June 10	12	11	2	0	0	9
June 13	32	32	28	0	0	4
June 14	27	27	23	0	0	4
June 15	13	13	4	0	0	9
June 16	8	6	1	0	0	5
June 19	23	21	3	0	0	18
June 20	22	20	9	0	0	11
June 21	6	6	1	0	0	5
June 22	25	25	17	0	0	8
June 25	35	35	31	0	0	4
June 26	19	18	6	0	0	12
June 27	17	16	4	0	0	12
June 28	20	18	10	0	0	8
July 1	10	10	0	0	0	10
July 2	25	25	15	0	1	9
July 3	1	0	0	0	0	0
July 4	7	6	3	0	0	3
July 7	42	42	34	0	0	8
July 8	16	16	4	0	0	12
July 9	23	23	6	0	0	17
July 10	21	20	3	0	0	17
July 13	30	27	10	0	0	17
July 16	11	10	1	0	1	8
July 19	71	71	63	0	0	8
July 20	28	28	17	0	0	11
July 21	11	11	1	0	0	10
July 22	16	15	3	0	0	12
July 25	38	36	10	0	0	26
July 26	25	25	4	0	0	21
July 28	31	31	26	0	0	5
July 31	32	31	19	0	0	12

Table A2. Interview schedule and completion: Westview BC Ferries Terminal – August.

	Upper Sunshine Coast via Westview BC Ferries Terminal (June-August 2007)					
	Number of People Approached	Agree to Interview	Number of Residents	Part of Tour Group	Incomplete or Repeat Surveys	Useable Tourist Surveys
August 1	35	34	24	0	0	10
August 2	18	18	3	0	0	15
August 3	33	33	16	0	0	17
August 6	27	26	7	0	0	19
August 9	31	31	5	0	0	26
August 12	21	20	0	0	0	20
August 13	23	22	4	0	0	18
August 14	29	28	9	0	0	19
August 18	15	13	2	0	0	11
August 19	13	13	1	0	0	12
August 21	19	19	12	0	0	7
August 24	52	51	40	0	0	11
August 25	17	16	3	0	1	12
August 26	22	22	3	0	0	19
August 27	9	9	1	0	0	8
August 30	29	27	9	0	0	18
August 31	33	33	20	0	0	13
<b>Grand Total</b>	<b>1,134</b>	<b>1,097</b>	<b>519</b>	<b>0</b>	<b>3</b>	<b>575</b>

Table A3. Interview schedule and completion: Langdale BC Ferries Terminal.

	Lower Sunshine Coast via Langdale BC Ferries Terminal (June-August 2007)							
	Number of People Approached	Number of Residents	Number of Tourists	Agree to Interview	Previously Interviewed	Part of Tour Group	Incomplete or Repeat Surveys	Useable Tourist Surveys
June 14	32	19	13	12	0	0	0	12
June 15	34	13	21	21	0	0	0	21
June 16	25	9	16	15	0	0	0	15
June 20	19	1	18	18	0	0	0	18
June 21	30	10	20	19	0	0	0	19
June 26	38	13	25	23	0	1	0	22
June 27	33	9	24	24	0	0	0	24
July 2	27	7	20	19	3	0	0	16
July 3	39	12	27	26	0	1	0	25
July 8	27	6	21	20	1	0	0	19
July 9	44	15	29	28	1	2	1	24
July 14	36	10	26	24	0	1	0	23
July 15	44	11	33	30	1	2	0	27
July 20	32	5	27	22	0	0	0	22
July 21	39	12	27	27	0	4	0	23
July 26	39	8	31	29	0	3	0	26
July 27	31	11	20	19	0	0	0	19
August 1	52	15	37	36	0	1	0	35
August 2	55	17	38	36	1	0	0	35
August 7	45	13	32	30	0	0	0	30
August 8	43	11	32	30	1	0	0	29
August 13	51	10	41	39	1	0	0	38
August 14	40	12	28	26	0	0	0	26
August 19	56	13	43	42	0	1	0	41
August 20	40	8	32	28	1	0	0	27
August 24	61	21	40	37	0	2	0	35
August 25	23	4	19	19	1	0	0	18
August 26	33	4	29	29	0	0	0	29
August 31	34	13	21	21	0	0	0	21
<b>Grand Total</b>	<b>1,102</b>	<b>312</b>	<b>790</b>	<b>749</b>	<b>11</b>	<b>18</b>	<b>1</b>	<b>719</b>

## **Appendix B. Interview Questionnaires**



Interviewer \_\_\_\_\_

Date \_\_\_\_\_

POWELL RIVER RS

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

1. Would you have approximately 8 minutes to answer some questions? If you participate, we would like to give you a complimentary gift for your time.

☐ YES ☐ NO Are you sure? You will receive a complimentary gift for completing the interview? Thank you.

2. Are you a resident of the Powell River region? The Powell River region is defined as the area south of Lund and north of Saltery Bay, including surrounding islands of Savary, Texada and Nelson Islands.

☐ NO ☐ YES Thanks for agreeing to participate, however, we are only interviewing visitors from outside the area.

3. Are you part of an organized tour group?

☐ NO ☐ YES Thanks for agreeing to participate, however, we are only interviewing visitors who travel independently.

4. Where do you live (usual place of residence)?

Province \_\_\_\_\_ OR State \_\_\_\_\_ OR Country (other international) \_\_\_\_\_

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

**IF FROM BC** 5. What is the **primary** purpose of your trip? Is it for Leisure, Visiting Friends and Family or Business?

- ☐ LEISURE → Go to Q6  
☐ VISITING FRIENDS & FAMILY → Go to Q6  
☐ WORK/BUSINESS ACTIVITY → Go to Box 1  
☐ OTHER (SPECIFY \_\_\_\_\_) → Go to Q6

**IF NOT FROM BC** 5. What is the **primary** purpose of your trip to British Columbia? Is it for Leisure, Visiting Friends and Family or Business?

- ☐ LEISURE → Go to Q6  
☐ VISITING FRIENDS & FAMILY → Go to Q6  
☐ WORK/BUSINESS ACTIVITY → Go to Box 1  
☐ OTHER (SPECIFY \_\_\_\_\_) → Go to Q6

#### BOX 1 (ONLY FOR BUSINESS TRAVELLERS)

▪ Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ days

#### **IF OVERNIGHT TRAVELLERS**

▪ How many of those days will be spent travelling in British Columbia? \_\_\_\_\_ days

▪ And how much time did you spend in the Powell River region? The Powell River region is defined as the area south of Lund and north of Saltery Bay, including surrounding islands of Savary, Texada and Nelson Islands.

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

▪ In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

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

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

\$ \_\_\_\_\_ ☐ DK/NR

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

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

POWELL RIVER RS

6. What is your **primary** destination (place that you will spend the most time)?

\_\_\_\_\_

☐ NONE, TOURING☐ DK/NR

7. We are interested in the communities people visit while travelling in British Columbia. On this trip, have you or are you planning to stop and spend time at (at least 1 hour).....

A. SECHLT

☐ YES ☐ NO☐ DK/NR

B. COMOX VALLEY (COURTENAY/COMOX)

☐ YES ☐ NO☐ DK/NR

C. CAMPBELL RIVER

☐ YES ☐ NO☐ DK/NR**IF FROM BC** 8. What is your **primary** (most often used) mode of transportation while on this trip?☐ CAR/TRUCK/MC☐ RV☐ BUS☐ BICYCLE☐ OTHER \_\_\_\_\_**IF NOT FROM BC** 8. What is your **primary** (most often used) mode of transportation while in British Columbia?☐ CAR/TRUCK/MC☐ RV☐ BUS☐ BICYCLE☐ OTHER \_\_\_\_\_

9. Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ days

**IF Q 9 ≤ 1**

▪ In Canadian dollars, what will your travel party's total expenditures be today?

\$ \_\_\_\_\_

☐ DK/NR*That concludes our interview. Thank you for participating!***IF Q 9 > 1**

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

11. And how much time did you spend in the Powell River region? The Powell River region is defined as the area south of Lund and north of Saltery Bay, including surrounding islands of Savary, Texada and Nelson Islands.

☐ NONE - JUST PASSING THROUGH

\_\_\_\_\_ HOURS

OR

\_\_\_\_\_ DAYS

☐ DK/NR**IF SPENDING TIME IN REGION** 12. What was your **primary** (most time spent) leisure activity while in the Powell River region?

\_\_\_\_\_

☐ NONE☐ DK/NR13. On this trip, which of the following best describes your **primary** (most often used) type of accommodation?☐ RESORT/HOTEL/MOTEL☐ B&B☐ CAMPGROUND/RV☐ FRIENDS OR RELATIVES☐ OTHER \_\_\_\_\_

14. In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

\$ \_\_\_\_\_

☐ BEGAN TRIP TODAY☐ DK/NR

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

POWELL RIVER RS

15. Thinking about the time you spent in Powell River... which of the following statements best describes how flexible or inflexible you were with time in this region?

- ☐ A. I COULD NOT SPEND ANY EXTRA TIME IN THIS REGION AT ALL  
☐ B. I COULD HAVE SPENT AN EXTRA FEW HOURS IN THIS REGION (LESS THAN A DAY)  
☐ C. I COULD HAVE SPENT AN EXTRA DAY OR DAYS IN THIS REGION  
☐ D. DK/NR

**IF FROM BC AND ENTIRE TRIP IN BC** 16. What about your flexibility in the amount of time you have to spend on this entire trip?

- ☐ A. I CAN NOT SPEND ANY EXTRA TIME ON THIS TRIP AT ALL  
☐ B. I CAN SPEND AN EXTRA FEW HOURS ON THIS TRIP (LESS THAN A DAY)  
☐ C. I CAN SPEND AN EXTRA DAY OR DAYS ON THIS TRIP  
☐ D. DK/NR

**ELSE** 16. What about your flexibility in the amount of time you have to spend in British Columbia?

- ☐ A. I CAN NOT SPEND ANY EXTRA TIME IN BRITISH COLUMBIA  
☐ B. I CAN SPEND AN EXTRA FEW HOURS IN BRITISH COLUMBIA (LESS THAN A DAY)  
☐ C. I CAN SPEND AN EXTRA DAY OR DAYS IN BRITISH COLUMBIA  
☐ D. DK/NR

17. On this trip, have you stopped at the Powell River Visitor Centre?

- ☐ NO ☐ YES ☐ DK/NR

**IF NO** 18. Why not? \_\_\_\_\_

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

19. Including yourself, how many people are in your travel party today? How many are children under 18 and how many are adults?

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

20. How many leisure trips have you taken in the past 12 months?

\_\_\_\_\_ trip(s) ☐ DK/NR

21. In which of the following age category are you?

- ☐ A. UNDER 24 YEARS ☐ E. 55-64 YEARS  
☐ B. 25-34 YEARS ☐ F. 65 YEARS OR OLDER  
☐ C. 35-44 YEARS ☐ G. DK/NR  
☐ D. 45-54 YEARS

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

- ☐ A. LESS THAN HIGH SCHOOL ☐ E. UNIVERSITY DEGREE  
☐ B. HIGH SCHOOL ☐ F. MASTERS/PHD DEGREE  
☐ C. SOME TECHNICAL COLLEGE OR UNIVERSITY ☐ G. OTHER \_\_\_\_\_  
☐ D. COLLEGE OR TECHNICAL DIPLOMA ☐ H. DK/NR

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

POWELL RIVER RS

23. Before taxes, in Canadian dollars, what is your approximate annual household income?

☐ A. LESS THAN \$25,000☐ E. \$100,000 TO \$149,999☐ B. \$25,000 TO \$49,999☐ F. \$150,000 PLUS☐ C. \$50,000 TO \$64,999☐ F. DK/NR☐ D. \$65,000 TO \$99,999

24. Gender of respondent

☐ MALE☐ FEMALE

**25. As a follow-up to this interview, we would like to contact you after your trip to inquire about the rest of your trip in British Columbia. Participation would involve completing a questionnaire that will be mailed to you. In exchange, we are pleased to offer you one free edition of British Columbia Magazine and a chance to win a digital camera. All contact information will be kept confidential and only used for this study. Would you be willing to participate?**

☐ NO☐ YES**IF YES** 26. Can I get your name and mailing address?

Name:
Mailing Address:
City:
Province/State:
Country:
Postal/Zip Code:

**Thank you for participating!**

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

SUNSHINE COAST RS

My name is \_\_\_\_\_ and I'm conducting a visitor survey on behalf of Tourism British Columbia.

1. Are you a resident of the lower Sunshine Coast? The lower Sunshine Coast is defined as the area south of Egmont and north of Port Mellon. **(Consult study area map)**

☐ NO ☐ YES *Thanks for agreeing to participate, however, we are only interviewing visitors from outside the area.*

**We'd like to ask you about your trip to the lower Sunshine Coast and your experiences in British Columbia. Can I please speak with someone in your travel party who is knowledgeable about your trip planning and expenditures?**

2. Would you have approximately 8 minutes to answer some questions? If you participate, we would like to give you a complimentary gift for your time.

☐ YES ☐ NO *Are you sure? You will receive a complimentary gift for completing the interview? Thank you.*

3. Were you or anyone in your travel party interviewed at the Saltery Bay ferry terminal on this trip?

☐ NO ☐ YES *Thanks for agreeing to participate, however, we have already captured your trip information.*

4. Are you part of an organized tour group?

☐ NO ☐ YES *Thanks for agreeing to participate, however, we are only interviewing visitors who travel independently.*

5. Where do you live (usual place of residence)?

Province \_\_\_\_\_ OR State \_\_\_\_\_ OR Country (other international) \_\_\_\_\_

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

**IF FROM BC** 6. What is the **primary** purpose of your trip? Is it for Leisure, Visiting Friends and Family or Business?

- ☐ LEISURE → Go to Q7  
☐ VISITING FRIENDS & FAMILY → Go to Q7  
☐ WORK/BUSINESS ACTIVITY → Go to Box 1  
☐ OTHER (SPECIFY \_\_\_\_\_) → Go to Q7

**IF NOT FROM BC** 6. What is the **primary** purpose of your trip to British Columbia? Is it for Leisure, Visiting Friends and Family or Business?

- ☐ LEISURE → Go to Q7  
☐ VISITING FRIENDS & FAMILY → Go to Q7  
☐ WORK/BUSINESS ACTIVITY → Go to Box 1  
☐ OTHER (SPECIFY \_\_\_\_\_) → Go to Q7

#### BOX 1 (ONLY FOR BUSINESS TRAVELLERS)

▪ Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ days

#### IF OVERNIGHT TRAVELLERS

▪ How many of those days will be spent travelling in British Columbia? \_\_\_\_\_ days

▪ And how much time did you spend on the lower Sunshine Coast? The lower Sunshine Coast region is defined as the area south of Egmont and north of Port Mellon.

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

▪ In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

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

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

\$ \_\_\_\_\_ ☐ DK/NR

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

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

SUNSHINE COAST RS

7. What is your **primary** destination (place that you will spend the most time)?\_\_\_\_\_ ☐ NONE, TOURING ☐ DK/NR

8. We are interested in the communities people visit while travelling in British Columbia. On this trip, have you stopped and spent time in (at least 1 hour).....

A. POWELL RIVER ☐ YES ☐ NO ☐ DK/NR**IF FROM BC** 9. What is your **primary** (most often used) mode of transportation while on this trip?☐ CAR/TRUCK/MC ☐ RV ☐ BUS ☐ BICYCLE ☐ OTHER \_\_\_\_\_**IF NOT FROM BC** 9. What is your **primary** (most often used) mode of transportation while in British Columbia?☐ CAR/TRUCK/MC ☐ RV ☐ BUS ☐ BICYCLE ☐ OTHER \_\_\_\_\_

10. Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ days

**IF Q 10 ≤ 1** ■ In Canadian dollars, what will your travel party's total expenditures be today?\$ \_\_\_\_\_ ☐ DK/NR*That concludes our interview. Thank you for participating!***IF Q 10 > 1** 11. How many of those days will be spent travelling in British Columbia? \_\_\_\_\_ days

12. And how much time did you spend on the lower Sunshine Coast? The lower Sunshine Coast is defined as the area south of Egmont and north of Port Mellon.

☐ NONE - JUST PASSING THROUGH \_\_\_\_\_ HOURS OR \_\_\_\_\_ DAYS ☐ DK/NR**IF SPENDING TIME IN REGION** 13. What was your **primary** (most time spent) leisure activity while on the lower Sunshine Coast?\_\_\_\_\_ ☐ NONE ☐ DK/NR14. On this trip, which of the following best describes your **primary** (most often used) type of accommodation?☐ RESORT/HOTEL/MOTEL ☐ B&B ☐ CAMPGROUND/RV ☐ FRIENDS OR RELATIVES ☐ OTHER \_\_\_\_\_

15. In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

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

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

SUNSHINE COAST RS

16. Which of the following statements best describes your flexibility in the amount of time you spent on the lower Sunshine Coast?

- ☐ A. I COULD NOT SPEND ANY EXTRA TIME IN THIS REGION AT ALL  
☐ B. I SPENT AN EXTRA FEW HOURS IN THIS REGION (LESS THAN A DAY)  
☐ C. I SPENT AN EXTRA DAY OR DAYS IN THIS REGION  
☐ D. DK/NR

**IF FROM BC AND ENTIRE TRIP IN BC** 17. What about your flexibility in the amount of time you spent on this entire trip?

- ☐ A. I CAN NOT SPEND ANY EXTRA TIME ON THIS TRIP AT ALL  
☐ B. I CAN SPEND AN EXTRA FEW HOURS ON THIS TRIP (LESS THAN A DAY)  
☐ C. I CAN SPEND AN EXTRA DAY OR DAYS ON THIS TRIP  
☐ D. DK/NR

**ELSE** 17. What about your flexibility in the amount of time you have to spend in British Columbia?

- ☐ A. I CAN NOT SPEND ANY EXTRA TIME IN BRITISH COLUMBIA  
☐ B. I CAN SPEND AN EXTRA FEW HOURS IN BRITISH COLUMBIA (LESS THAN A DAY)  
☐ C. I CAN SPEND AN EXTRA DAY OR DAYS IN BRITISH COLUMBIA  
☐ D. DK/NR

18. On this trip, have you stopped at the Sechelt Visitor Centre?

- ☐ NO ☐ YES ☐ DK/NR

**IF NO** 19. Why not? \_\_\_\_\_

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

20. Including yourself, how many people are in your travel party today? How many are children under 18 and how many are adults?

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

21. How many leisure trips have you taken in the past 12 months?

\_\_\_\_\_ trip(s) ☐ DK/NR

22. In which of the following age category are you?

- ☐ A. UNDER 24 YEARS ☐ E. 55-64 YEARS  
☐ B. 25-34 YEARS ☐ F. 65 YEARS OR OLDER  
☐ C. 35-44 YEARS ☐ G. DK/NR  
☐ D. 45-54 YEARS

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

- ☐ A. LESS THAN HIGH SCHOOL ☐ E. UNIVERSITY DEGREE  
☐ B. HIGH SCHOOL ☐ F. MASTERS/PHD DEGREE  
☐ C. SOME TECHNICAL COLLEGE OR UNIVERSITY ☐ G. OTHER \_\_\_\_\_  
☐ D. COLLEGE OR TECHNICAL DIPLOMA ☐ H. DK/NR

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

SUNSHINE COAST RS

24. Before taxes, in Canadian dollars, what is your approximate annual household income?

☐ A. LESS THAN \$25,000☐ E. \$100,000 TO \$149,999☐ B. \$25,000 TO \$49,999☐ F. \$150,000 PLUS☐ C. \$50,000 TO \$64,999☐ F. DK/NR☐ D. \$65,000 TO \$99,999

25. Gender of respondent

☐ MALE☐ FEMALE

**26. As a follow-up to this interview, we would like to contact you after your trip to inquire about the rest of your trip in British Columbia. Participation would involve completing a questionnaire that will be mailed to you. In exchange, we are pleased to offer you one free edition of British Columbia Magazine and a chance to win a digital camera. All contact information will be kept confidential and only used for this study. Would you be willing to participate?**

☐ NO☐ YES**IF YES** 27. Can I get your name and mailing address?

Name:
Mailing Address:
City:
Province/State:
Country:
Postal/Zip Code:

**Thank you for participating!**



## Appendix C. Overall Weighting Methods

1. Administrative (passenger count) data was provided by BC Ferries for the Westview, Langdale and Saltery Bay terminals.
2. The number of travellers departing the Sunshine Coast through each ferry terminal was estimated by multiplying the percent of travellers (non-residents) interviewed by the administrative passenger count data by shift (morning and evening) and by month.
3. The number of travellers at the exiting ferry terminals by shift and by month was summed which gave an estimate of travellers exiting the Sunshine Coast by the Westview or Langdale BC Ferries terminals during June – August 2007.
4. The number of residents travelling regionally within the Sunshine Coast and those exiting the Sunshine Coast was determined using BC Ferries administrative data (as described above, including the Saltery Bay ferry terminal) and the mailback survey maps of the Upper Sunshine Coast respondents to determine the travel route proportions in the Sunshine Coast.
5. Due to the high percentage of travellers who agreed to participate in the survey, we assumed that these travellers were representative of those who did not agree to participate. Therefore we weighted up those travellers who agreed to participate in the survey to the total tourist population.
6. These estimates do not include tour group travellers, as they were excluded from the survey.
7. These estimates do not include travellers departing the Sunshine Coast by private boats, floatplanes or airplanes.

## Appendix D. Origin of Visitors from the U.S.

State	Percent
Washington	48.7
California	18.0
Michigan <sup>1</sup>	6.1
Oregon <sup>1</sup>	4.6
Texas <sup>1</sup>	3.4
Idaho <sup>1</sup>	3.3
Connecticut <sup>1</sup>	3.0
Pennsylvania <sup>1</sup>	2.4
New York <sup>1</sup>	2.0
Alaska <sup>1</sup>	1.6
Hawaii <sup>1</sup>	1.6
Colorado <sup>1</sup>	0.8
Florida <sup>1</sup>	0.7
Ohio <sup>1</sup>	0.7
Montana <sup>1</sup>	0.4
Arizona <sup>1</sup>	0.4
Louisiana <sup>1</sup>	0.4
Minnesota <sup>1</sup>	0.4
New Mexico <sup>1</sup>	0.4
Tennessee <sup>1</sup>	0.4
Vermont <sup>1</sup>	0.4
Virginia <sup>1</sup>	0.3

1. Unweighted sample size less than 10.