



COMMUNITY
TOURISM
FOUNDATIONS®

RESEARCH & PLANNING

2007 SUNSHINE COAST VISITOR STUDY FINDINGS

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

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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 ¹	6,341	1.8%
Exiting Travellers	342,977	98.2%
Residents ²	16,675	4.8%
Non-Residents	326,302	93.4%
Grand Total	349,318	100.0%

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 ¹	13,918	4.1%	n/a	n/a
Grand Total	342,977	100.0%	\$77,620,679	100.0%

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.