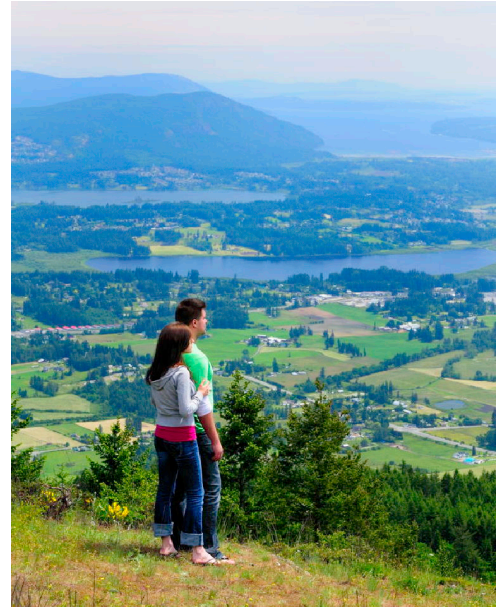


Visitor Profile

Cowichan – Summer 2015



Concept and Model

This visitor profile was created for Tourism Cowichan, in partnership with the local region, The Sociable Scientists, and Vancouver Island University. Between June and October 2015, nineteen ballot boxes were placed across the region in businesses and operations that visitors frequent. Prompted by an information poster on the Visitor Experience Survey, and the chance to win a prize package (upon completion of the survey) provided by tourism operators in the region, visitors could complete a ballot with their name and email address while in the community, then drop it in the ballot box. Approximately two weeks later, The Sociable Scientists sent those visitors an invitation to complete an online survey on their experience in the region. Once the survey was closed in early October, The Sociable Scientists, and the VIU team analyzed the data, and then created this visitor profile.

Special Points of Interest:

Visitors were intercepted from June to October of 2015 throughout the Cowichan region.

A total of 1,263 ballots were collected and 609 surveys were completed. The response rate was 48%. Of the 609 completed surveys, 128 were residents and 3 were minors resulting in 478 useable surveys. 64% of respondents were female and 36% were male.

Length of Stay

Figure 1. Visitors were asked to indicate how many nights they spent in each region of Vancouver Island. The columns in Figure 1 show the average number of nights that visitors spent in each of the regions they visited, while the line shows the % of visitors who spent at least one night in each of the regions. Refer to map for regions. On average, visitors to Cowichan spent **9** nights away from home. **Multiple options could be selected therefore combined percent does not equal 100%.*

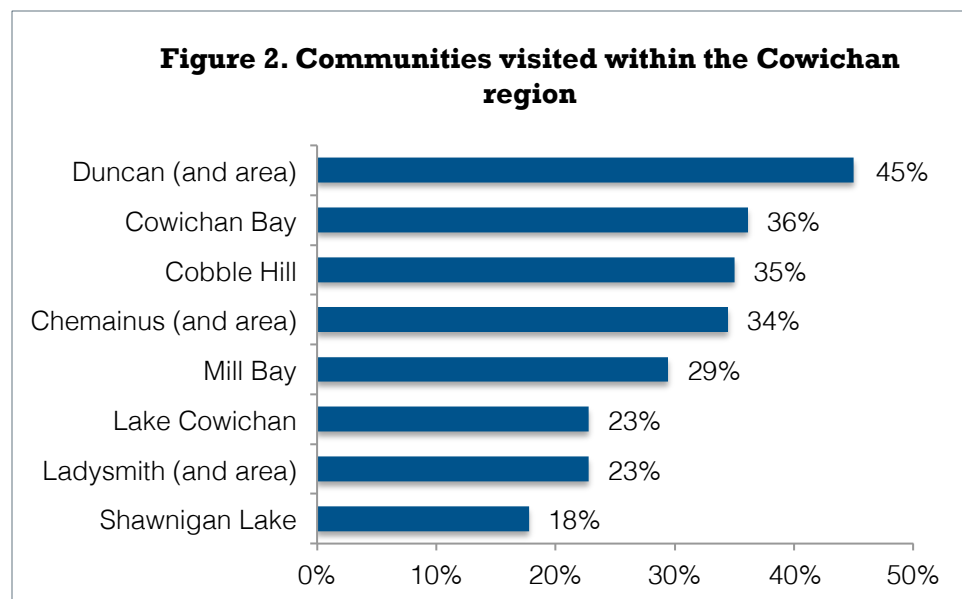
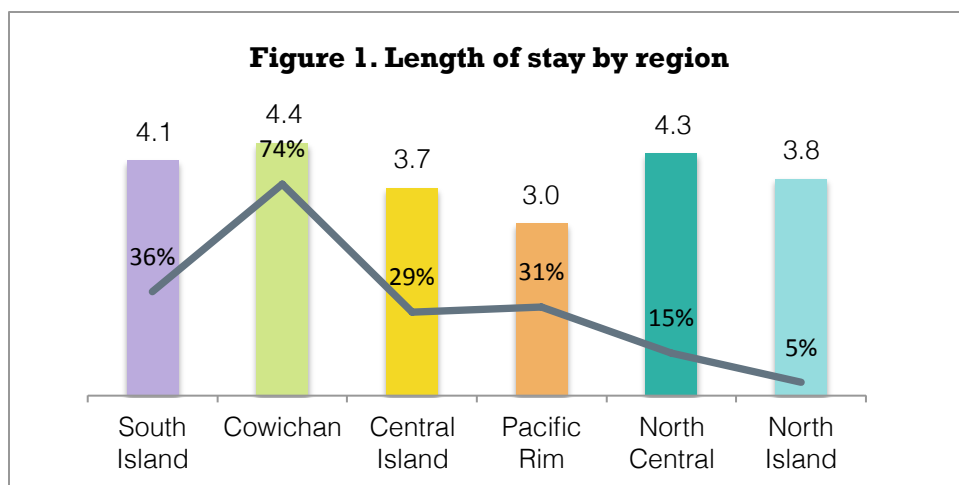


For 61% of visitors Cowichan was the main destination of their trip, for 34% of visitors it was one of several planned stops but not the main destination, and for 5% it was an unplanned stop on their way to another destination.

Nights Spent in Cowichan

There were slightly more overnight visitors (58%) than day trip only visitors (42%). 77% of respondents were repeat visitors, while only 23% were first time visitors.

Figure 2. Visitors were given a list of communities within the Cowichan region, and asked to select which communities they visited during their trip. **Multiple communities could be selected therefore combined percent does not equal 100%.*



Transportation

Figure 3. Visitors were asked to indicate what type of transportation they used to travel to Vancouver Island. The results do not include visitors who reside on Vancouver Island.

Of the 80% of visitors who arrived by ferry, 32% landed at Swartz Bay, 31% landed at Departure Bay, and 27% landed at Duke Point. 80% of ferry passengers travelled in a vehicle and 20% were walk-on passengers.

Of the 14% that arrived by air, 71% arrived at the Victoria International Airport, 15% at the Nanaimo Airport, 9% at the Comox Harbour, 3% at the Victoria Harbour, and 3% at the Comox Valley Airport.

Figure 3. Transportation to Vancouver Island

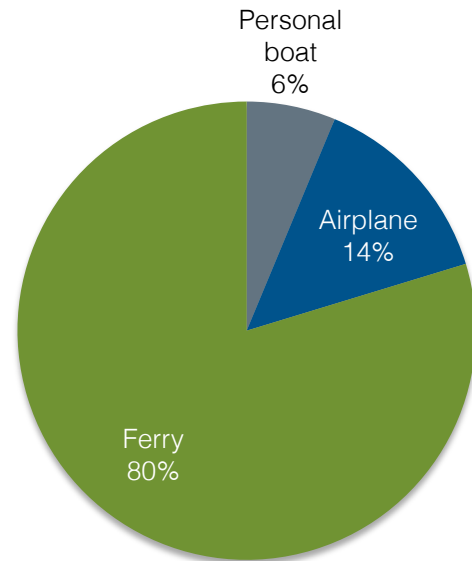
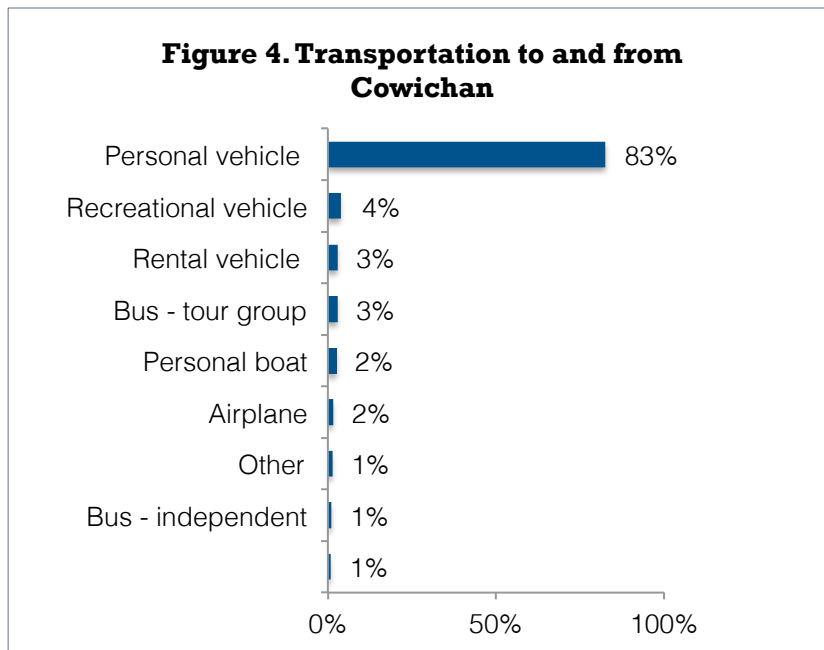


Figure 4. This figure demonstrates what form of transportation visitors used to get to and from Cowichan once they had arrived on Vancouver Island (including residents of Vancouver Island).



Pacific Marine Circle Route

Visitors were asked if they travelled on the Pacific Marine Circle Route during their trip. Of the 14.5% that travelled the route 7.5% indicated they took the Lake Cowichan to Sooke direction, and 7.0% travelled the opposite directions.

Parking

Visitors were asked if a lack of parking deterred them from spending time in any of the Cowichan communities. The communities where visitors found parking to be most challenging were Cowichan Bay, Duncan, and Chemainus.

Trip Purpose

When asked about the purpose of their visit, 82% of visitors indicated their trip was for leisure, 27% said they were visiting friends and/or relatives, 4% said it was for a combination of business and leisure, and 1 % said it was for business or work.

“Finding parking in Cowichan Bay was a challenge.”

Trip Motivation

Figure 5. The word cloud below represents the words visitors used to describe the **inspiration** for their trip to Cowichan. The larger words are the ones mentioned most often by visitors in their responses.



Influence of Screen-based Content

Visitors were asked if anything they have seen on a screen influenced their decision to visit Cowichan, 83% said no, 9% said yes, and 8% said I don't know.

Electronic Devices

Figure 7. The figure shows what types of electronic devices visitors used for travel planning purposes during their trip. The most popular devices were smartphones (56%), laptops (35%), and tablets (28%). *Multiple devices could be selected therefore combined percent does not equal 100%

Figure 6. Trip planning

Planning

Figure 6. This figure shows how far in advance visitors planned their trip to Cowichan. The results show that 64% of visitors planned their trip *less than* one month in advance, 36% plan their trip *at least* one month in advance.

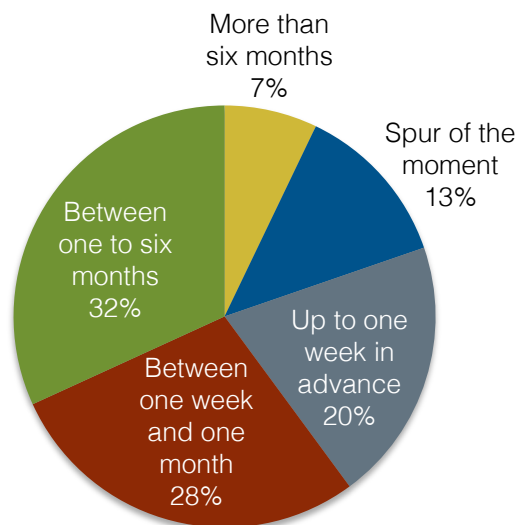
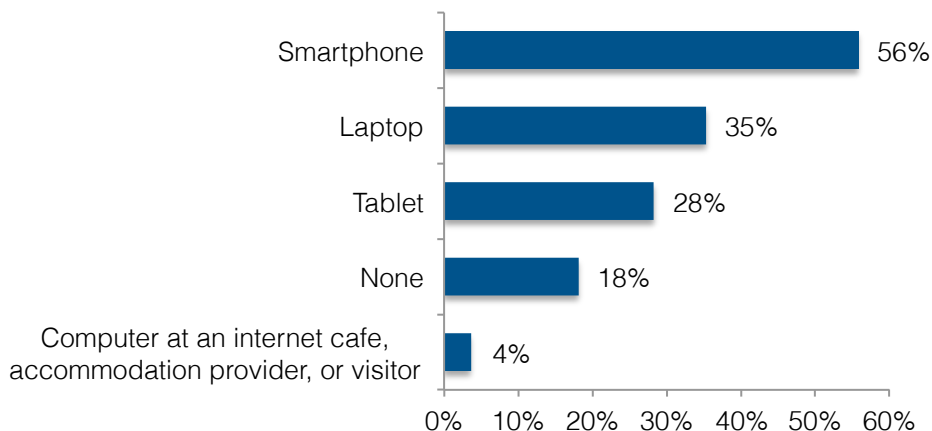


Figure 7. Electronic devices used for travel planning during trip



Sources of Information

Figure 8. Visitors were asked to indicate which sources of information they used to plan their trip before and during their visit. The top sources of information were friends and relatives (55%), previous personal experience (40%), other destination-specific websites (22%), and www.TourismCowichan.com (21%). Sources with 5% or less were not included in the graph. **Multiple options could be selected therefore combined percent does not equal 100%*

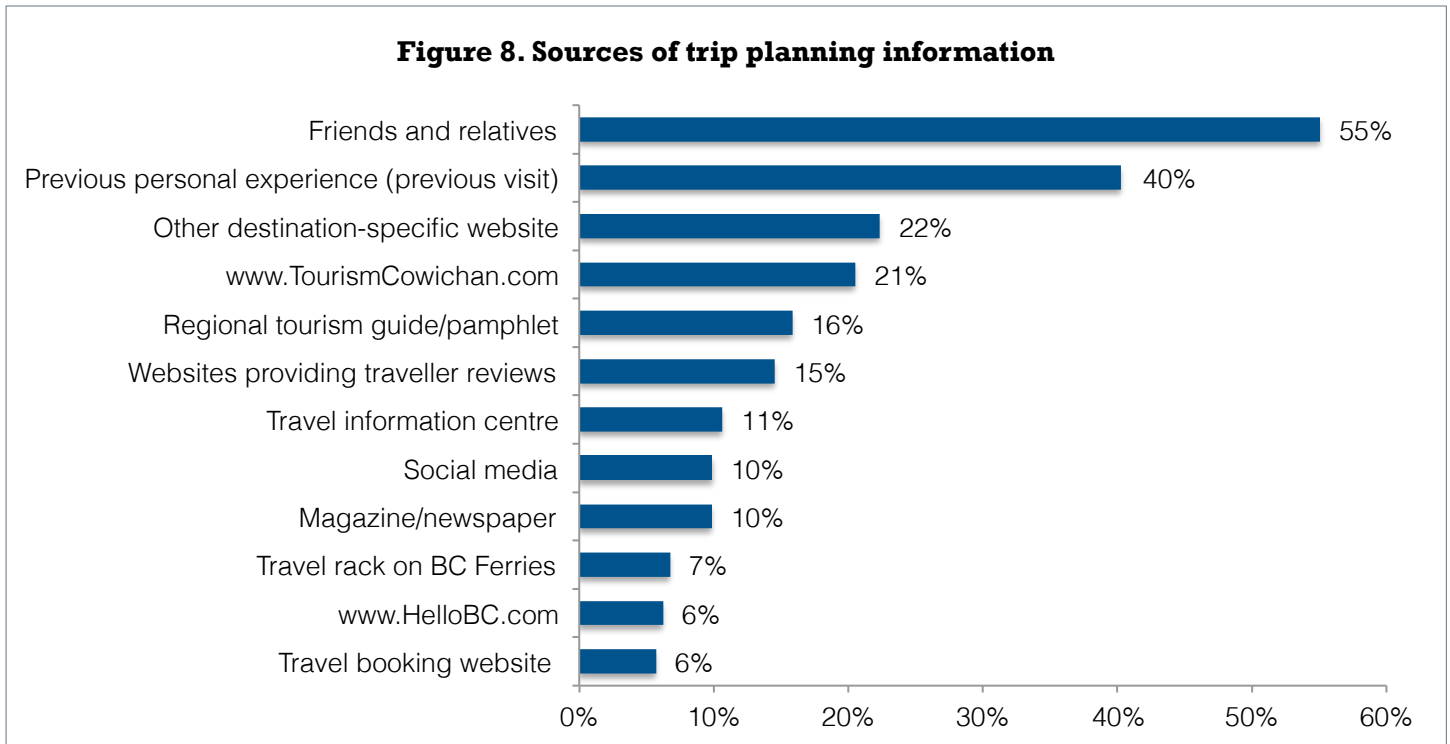
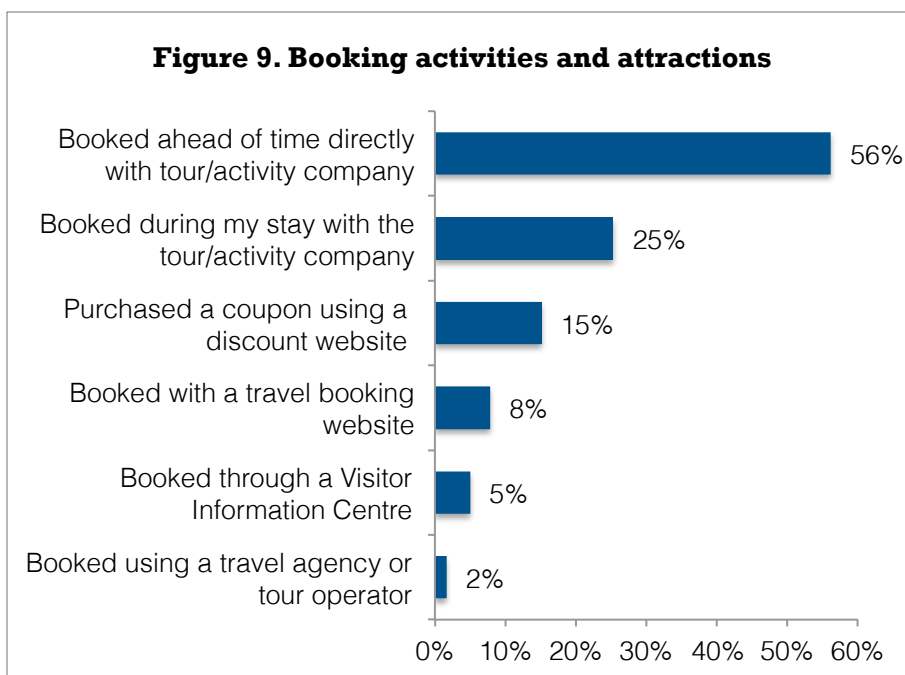


Figure 9. When asked how they booked the activities and attractions they participated in, 56% of visitors booked *ahead of time* directly with tour/activity company and 25% booked *during their stay* with the tour/activity company. **Multiple activities and attractions could be selected therefore combined percent does not equal 100%.*



Events Attended

Visitors were asked if they were visiting Cowichan to attend a specific event. Of the 30% that said they were, the type of events included Sunfest, Dragonboat Festival, MS Bike Tour Grape Escape, theatre events, and private events (e.g. weddings and birthdays).

Activities & Attractions

Figure 10. Visitors were asked to indicate which tourism attractions they visited during their stay in Cowichan. The most popular attractions were local shops/boutiques (57%), beaches (51%), brewery, winery, and/or cidery (46%), and parks and trails (45%). Some of the “other” responses included rivers and lakes, Pacific Northwest Raptors Centre, and murals. Attractions with 5% of responses or less have been left out of this graph. **Multiple attractions could be selected therefore combined percent does not equal 100%.*

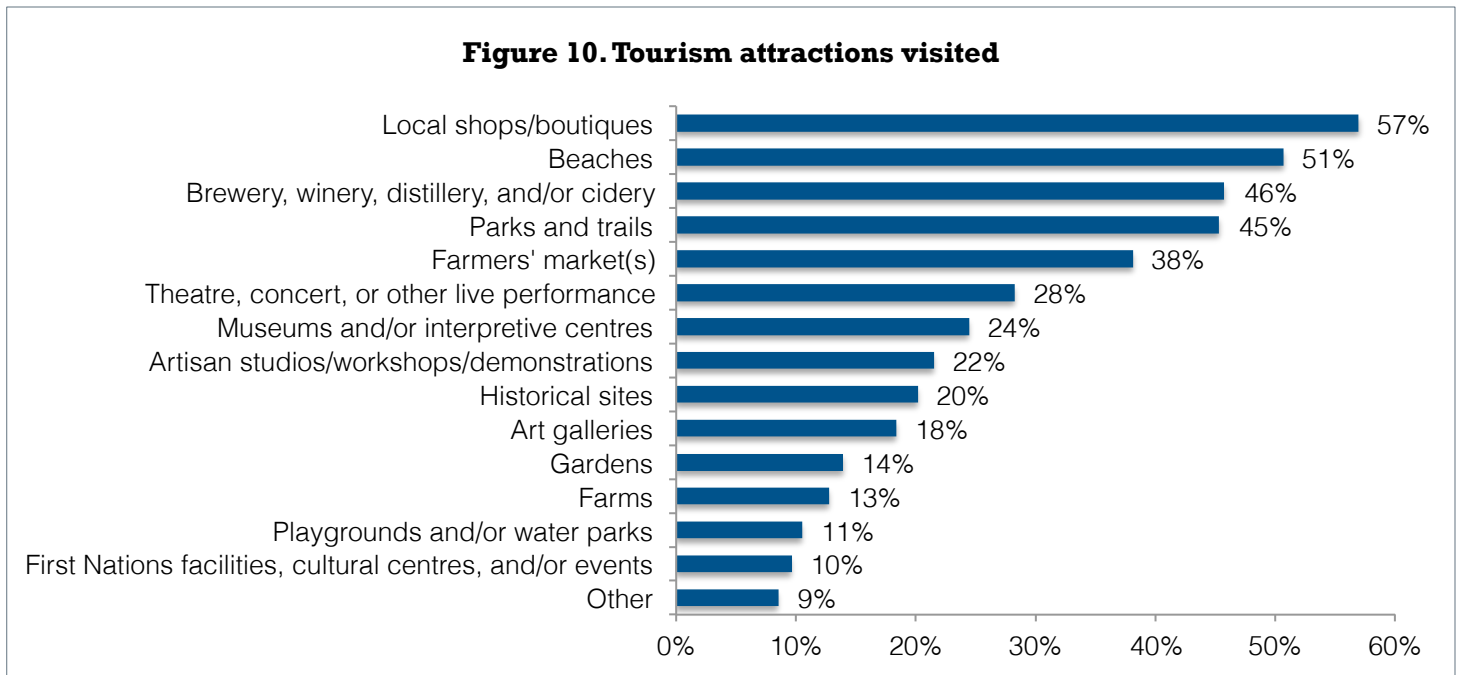
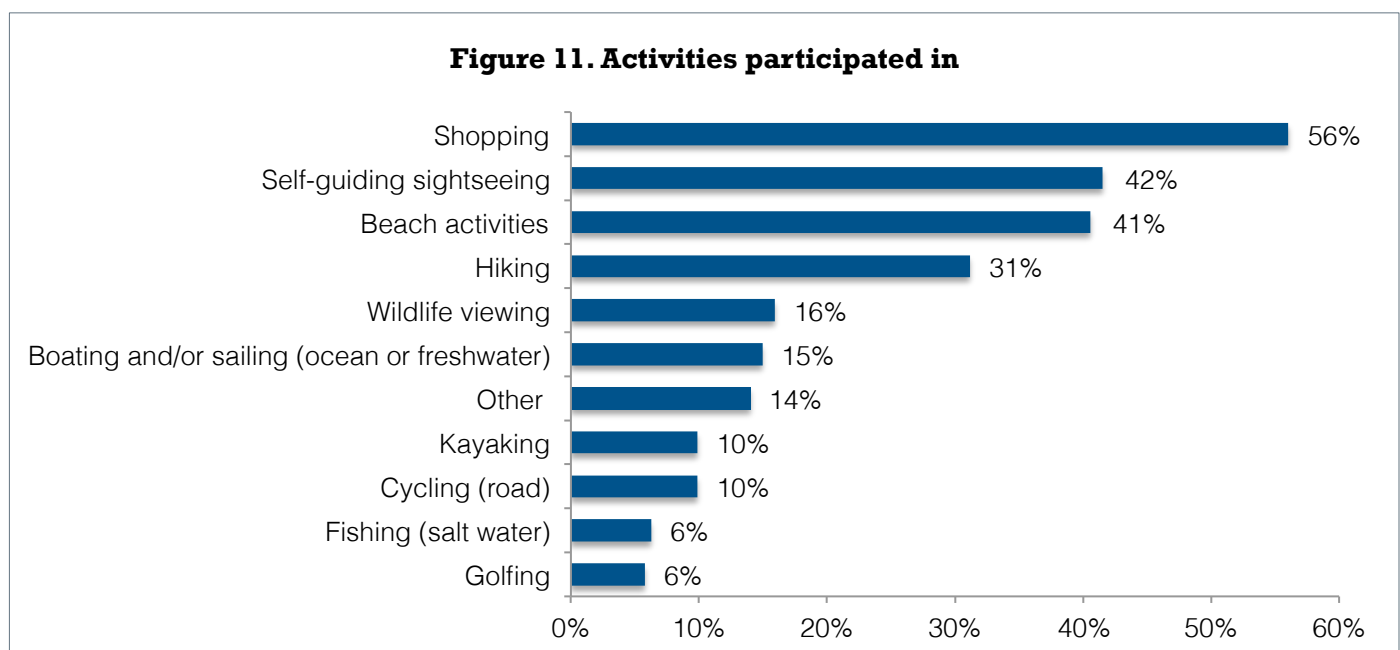


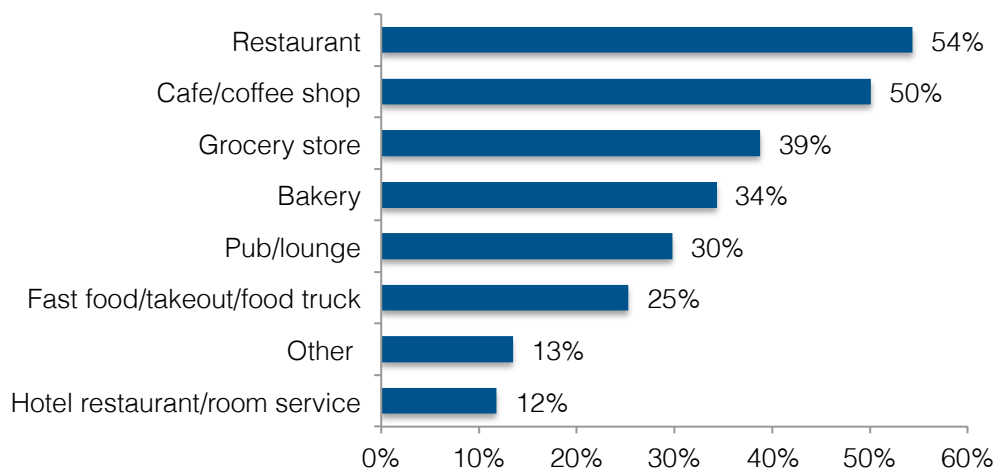
Figure 11. Visitors to Cowichan specified which activities their groups participated in during their stay. The top activities were shopping (56%), self-guided sightseeing (42%), beach activities (41%), and hiking (31%). Activities with 5% of responses or less have been left out of this graph. Some of the “other” responses included wine tasting, swimming, and river floating/tubing. **Multiple activities could be selected therefore combined percent does not equal 100%.*



Food & Beverage Establishments

Figure 12. The most commonly used food and beverage establishments for visitors were restaurants (54%), café/coffee shops (50%), and grocery stores (39%). Some of the “other” responses included winery/cidery, and ice cream shop. **Multiple options could be selected therefore combined percent does not equal 100%.*

Figure 12. Food and beverage establishments utilized



Accommodation

Figure 13. The bars in this figure show what percent of visitors stayed in each type of accommodation, and the number in brackets is the average number of nights they stayed. For example, 34% of visitors stayed in a hotel/motel and on average they stayed 2.4 nights. **Multiple accommodation types could be selected therefore combined percent does not equal 100%.*

Figure 13. Percent of visitors in each accommodation type (average # of nights)

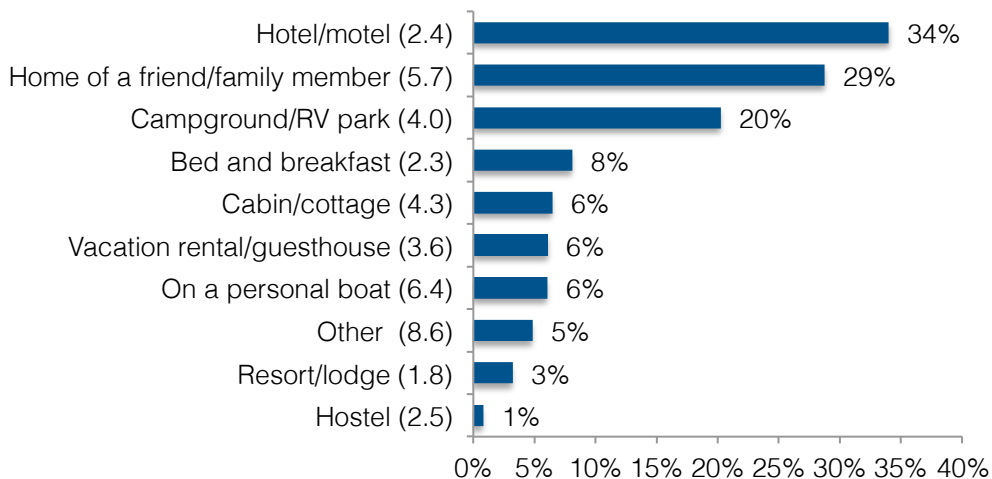
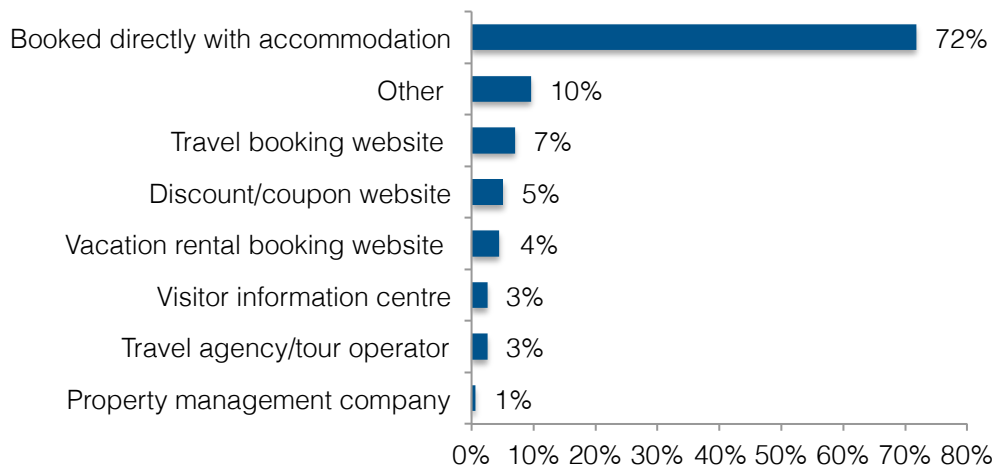


Figure 14. When asked how they booked their accommodations, 72% of visitors booked directly with the accommodation provider. Some of the “other” responses included booking accommodation via the Chemainus Theatre and events such as Sunfest. **Multiple options could be selected therefore combined percent does not equal 100%.*

Figure 14. Booking accommodations



Group Composition

Figure 15. Visitors were asked to select which categories best described their group. The “other” responses included travelling with adult children and grandchildren.

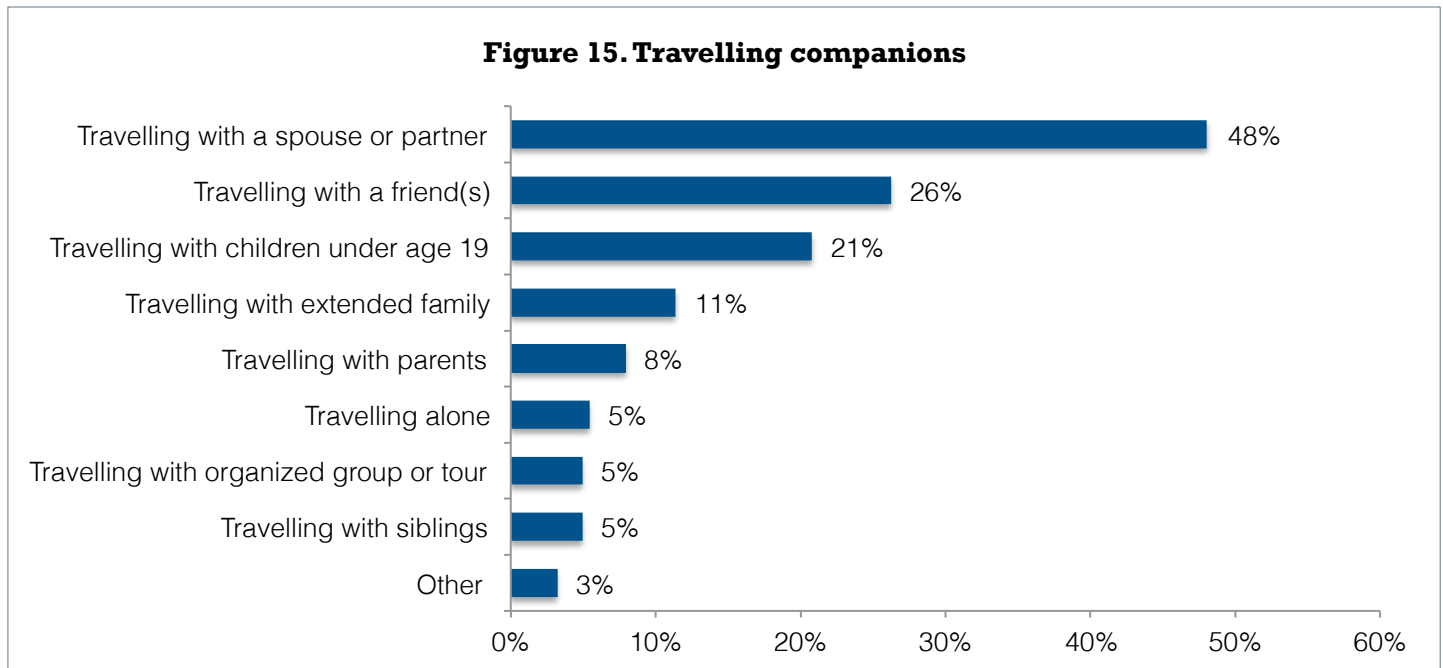
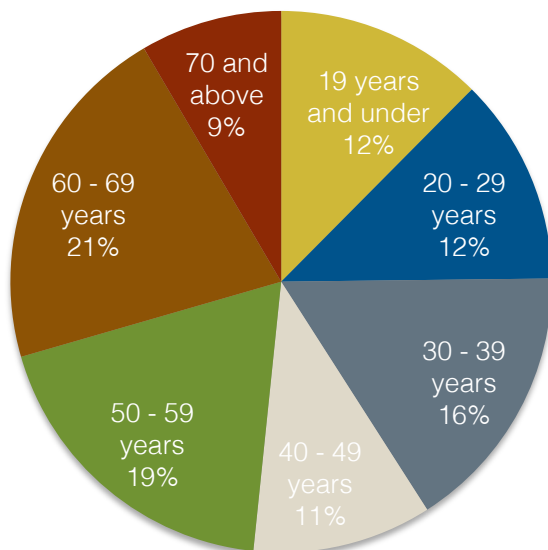


Figure 16. This graph shows the percent of visitors that belong to each age category. The average **group size** was **3.0** people per group; 58% of groups consisted of two or three people, 4% were solo travellers, and only 6% had 10 or more people.

Figure 16. Visitor ages



Net Promoter Score

Figure 17. Visitors were asked to rate their likeliness to recommend the Cowichan region to their family and friends on a scale from “Very Unlikely” (0) to “Very Likely” (10). The people that rate between 0 and 6 are considered detractors, those that rate 7 or 8 are considered passives, and those that rate 9 or 10 are considered promoters. Cowichan’s Net Promoter Score is 55.3.

Figure 17. Net Promoter Score

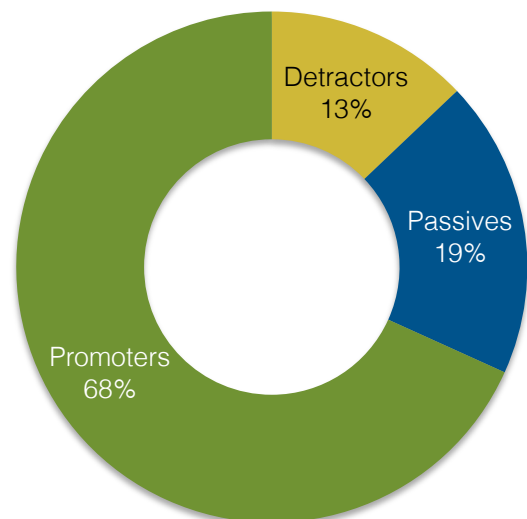
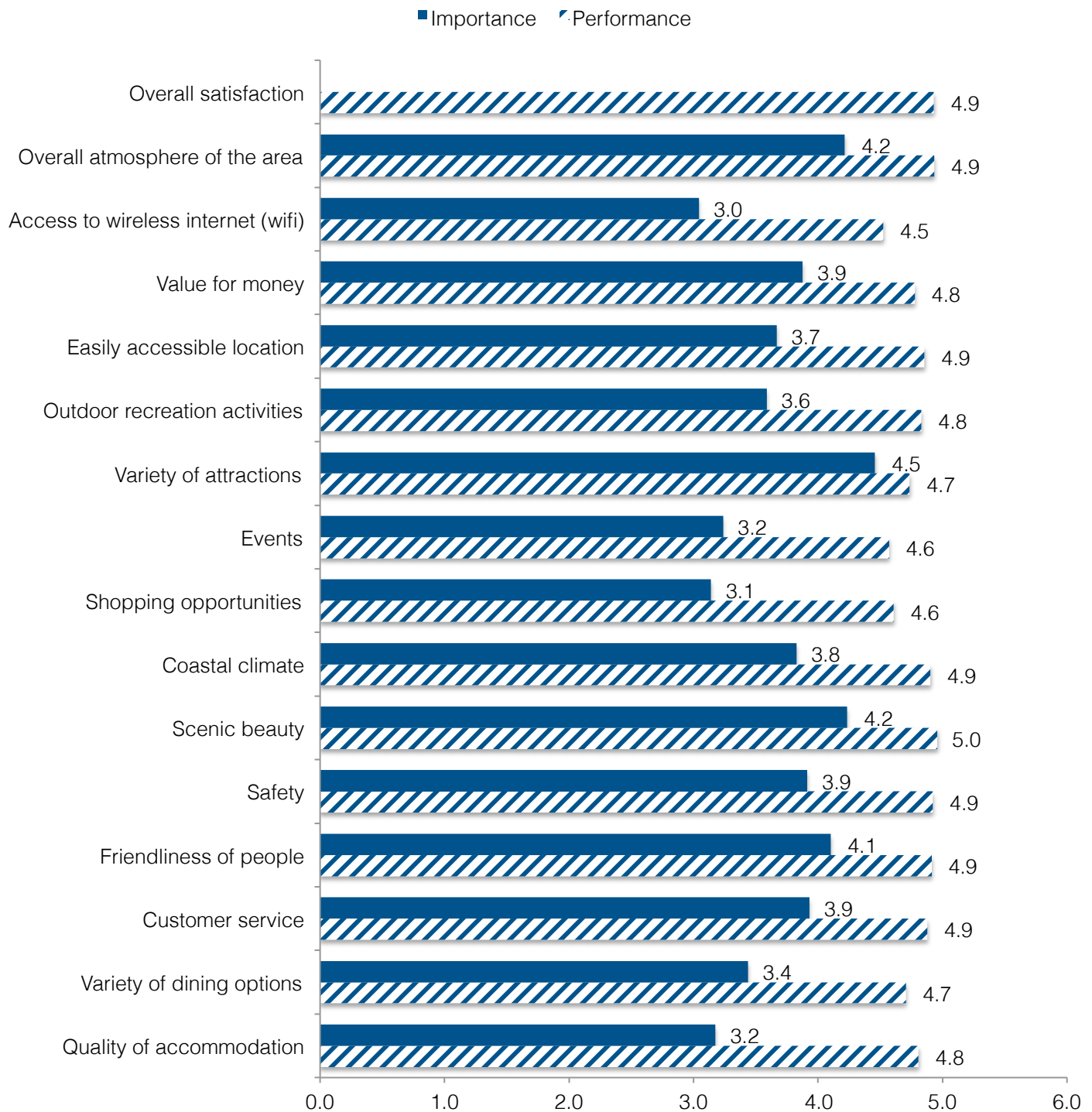


Figure 18. Comparison of importance of destination attributes with Cowichan's performance



Importance/Performance Ratings

Figure 18. Visitors were asked to rate the importance of a number of features in their decision to visit Cowichan on a scale from “Not At All Important” (1) to “Extremely Important” (5). They were then asked to evaluate each feature based on their actual experience in the region on a scale from “Very Bad” (1) to “Excellent” (5). Figure 18 shows the average performance of each feature compared with visitors’ perceptions of importance. **The overall satisfaction rating was 4.9 out of 5 (98%); the results show that Cowichan is over-performing across all attributes.**

Figure 19. Origin of visitors from Vancouver Island

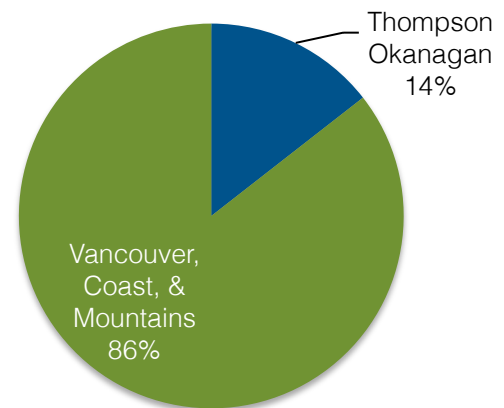
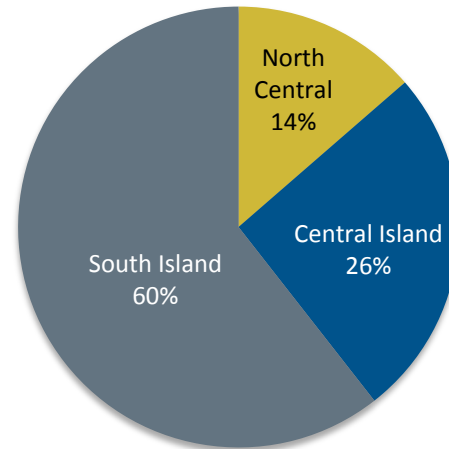
Visitor Origin

Visitors were asked to specify where they live; this data was then grouped into regions. Table 1 shows a comparison of origin of visitors between 2003 and 2015. The 2003 data is from the South Central Island Visitor Profile created by Tourism Vancouver Island, which included Ladysmith, Chemainus, and Duncan. The 2008 TVI Exit Survey does not separate data per region and therefore is not used for comparison. The results show an increase in domestic visitors and a decrease in international visitors. In figures 19, 20, and 21 locations with less than 4% of responses were not included in the charts.

Table 1. Comparing visitor origin between 2003 and 2015

Region	2003	2015
Vancouver Island	14%	55%
Other British Columbia	23%	23%
Canada (other than BC)	30%	17%
United States	19%	3%
International	14%	2%

Figure 20. Origin of visitors from British Columbia (outside of Vancouver Island)



Spending

Figure 22. To gather data on group spending, visitors were asked to report approximately how much their group spent on a typical day during their visit to Cowichan for each category. The average total spending per group was \$432 per day. The lines represent the general range of spending per group.

Figure 21. Origin of visitors from Canada (outside of BC)

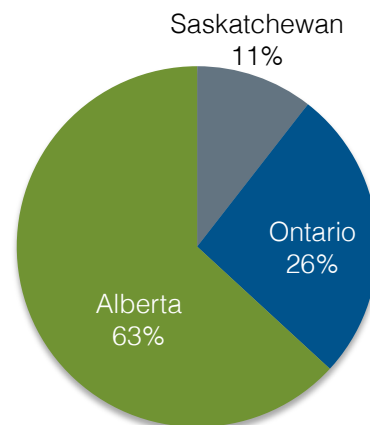


Figure 22. Average spending per group

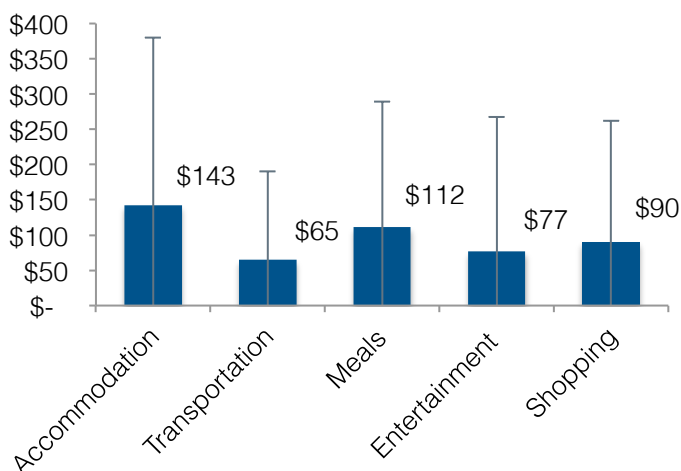


Figure 23. Visitors were asked to share the most enjoyable part of their trip to Cowichan in one word. Their responses are displayed in the word cloud below. The larger words are the ones mentioned most often by visitors in their responses.



"I always love visiting the Cowichan region. As a lover of the outdoors, it is wonderful to see how the Cowichan region has protected its natural spaces. It is a joy to spend time in the natural beauty of Cowichan!"

Visitor Feedback

Visitors were asked if they had any suggestions to improve their visit. The open-ended responses were categorized and summarized below.

Infrastructure

- Improve access to parking in Cowichan Bay, downtown Duncan, and Chemainus.
- Add more directional signage for attractions such as parks and wineries.

Visitor Services

- Encourage restaurants, pubs, and cafes to offer a wider variety of healthy dining options.
- Lengthen hours of operation of shops and restaurants during the summer months.

For more information:

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