



Cowichan Region Visitor Profile

COWICHAN
SLOW DOWN
SAVOUR LIFE

2022-2023



The World Leisure Centre of Excellence at Vancouver Island University conducted this research on the unceded territories of the Quw'utsun, Malahat, Ts'uubaa-asatx, Halalt, Penelakut, Stz'uminus, Lyackson, Pauquachin, Ditidaht, and Pacheedaht Peoples. This report was written on the ancestral unceded territory of the Snuneymuxw First Nation.

Citation:

Weighill, A., Chen, N., Underwood, A., & Godlonton, S. (2023). Cowichan Region visitor profile: 2022-2023. *World Leisure Centre of Excellence at Vancouver Island University*. Unpublished Report.

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Introduction

This research aimed to better understand the visitors to the Cowichan Tourism Region, which stretches from Malahat to Yellow Point. This region, known as an outdoor recreation playground, encompasses several municipalities, unincorporated communities, provincial parks, and established trail systems. The Cowichan Valley is a critical agricultural zone on Vancouver Island with a mixture of grain (food and fodder), fruit, berry, and grape (wine) crops and dairy and meat production. This has resulted in several wineries, breweries, cideries, distilleries, and a year-round weekly farmers' market.

Visitors typically access Cowichan Region communities via the Trans-Canada Highway, with the northern end connected to mainland BC by BC Ferries into Nanaimo and the Nanaimo Airport (YCD). The southern end of the Region is accessible via BC Ferries (Swartz Bay and Mill Bay), Blackball and Clipper Ferries (USA), and the Victoria International Airport (YYJ). Visitors can also take a seaplane to Maple Bay or arrive via boat at several marinas.

The diversity of tourism attractions, services, and accommodation providers varies widely within the Region. Most communities do not have extensive hotels and motels, but there are numerous campgrounds and short-term rentals (e.g., AirBnB/VRBO). In contrast, cities south (e.g., Victoria) and north (e.g., Nanaimo and Parksville) of the Region have more extensive accommodation options.

Methods

In consultation with 4VI and the Tourism Cowichan Society, an anonymous online questionnaire was developed to collect visitor data. The questionnaire was hosted on SurveyMonkey, and it consisted of questions related to:

- The region they travelled from.
- Their reason for visiting the Region.
- The activities they did, and attractions visited.
- Who they travelled with.
- Who they are.
- If they would recommend the Region.

Convenience sampling was utilized in this study and implemented in several ways. The World Leisure Centre of Excellence's (WLCE) research team conducted face-to-face intercepts throughout the Region during July and August of 2022. Team members approached people and asked if they were visiting or residing in the community. Visitors were then asked to complete the survey (using iPads) or provided with a business card with links to SurveyMonkey. This method was used in locations like Transfer Beach, Gordon Bay Provincial Park, Kinsol Trestle, Duncan Days, Chemainus (market days), Laketown Ranch, and Mill Bay. The team used the same approach to face-to-face intercepts at locations where they set up a tent with signage, including Merridale Cidery, Duncan Days, Lake Cowichan Visitors' Centre, and the Raptors.

Passive sampling was done by sharing posters and business cards through Visitors' Centres and businesses. Additionally, social media ads on Facebook and Instagram were shared during the fall 2022 and spring 2023.

To incentivize participation, participants could enter a draw to win a Cowichan Region prize package worth approximately \$ 1,000. To enter, they clicked on a link at the bottom of the survey. The link led to a separate questionnaire used to collect contact information.

Data Analysis

More than 350 participants (n=387) started the survey; however, after cleaning the data set to remove partial responses (n=97) and residents (n=2), the final sample included 288 completed questionnaires. This report presents summary descriptive results for the entire sample. Most questions resulted in nominal or categorical data; thus, the analysis included frequency distributions. The level of importance was measured using a Likert scale, allowing for calculating average scores in addition to frequency distributions.

Results

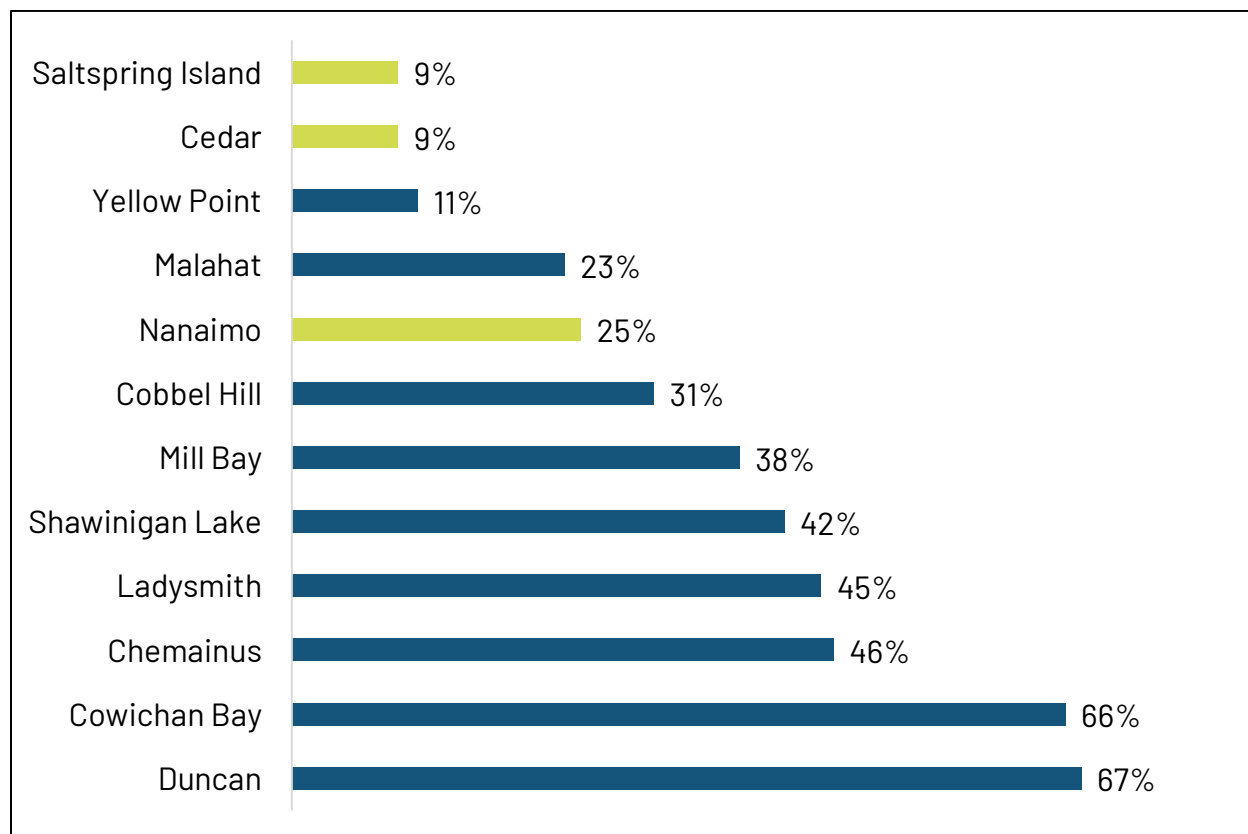
This section is organized into several subsections that focus on destination awareness, participant and travel party profiles, the importance of attractions for visitors, and travel behaviours, including attractions visited, activities participated in, and services

used. The final subsections focus on participants who required accessible services, Net Promoter Score, and data collected through open-ended questions.

Destination Awareness

Participants were asked to identify the communities included in the Cowichan Region. Three communities adjacent to but not in the Region were included. Figure 1 illustrates the two communities at each end of the Region (Yellowpoint and Malahat) were those least likely to be identified as part of the Cowichan Region. More participants believed that Nanaimo (25%) was part of the Region than were Yellowpoint (11%) or the Malahat (23%).

Figure 1: Awareness of Communities In (Blue) and Out (Green) of the Cowichan Region



Participant Profile

On average, participants were 48 years old (Figure 2) and most likely from the Island (35.5%) or the rest of BC (34.7%; Figure 3). Over half of the participants (61.7%) travelled in

groups of 3 or fewer people, and 11.9% were solo travellers (Figure 4). Men accounted for 37.8% of the sample, women for 61.5% and non-binary individuals for 0.8%. More groups travelled with members 55 or older (46.8%) than with children younger than 18 (31.9%).

Figure 2: Age Distribution of Participants (by Decades)

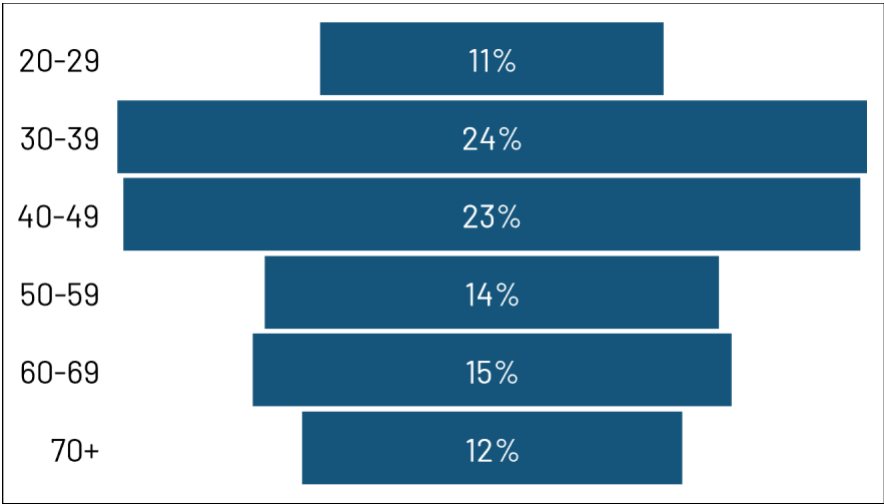


Figure 3: Participants' Place of Origin

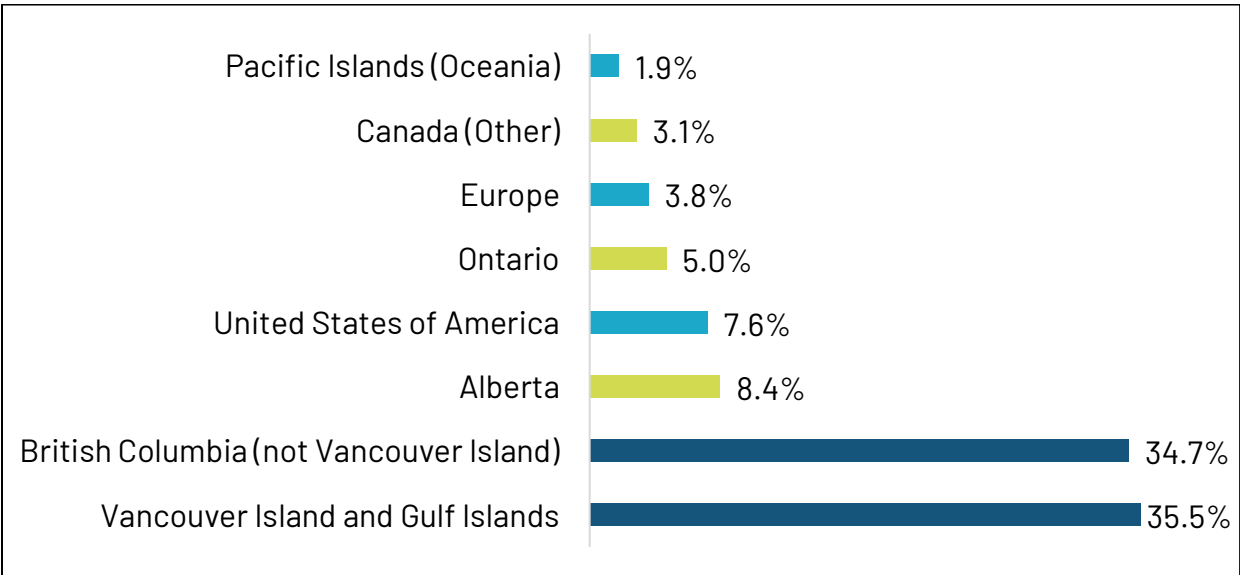
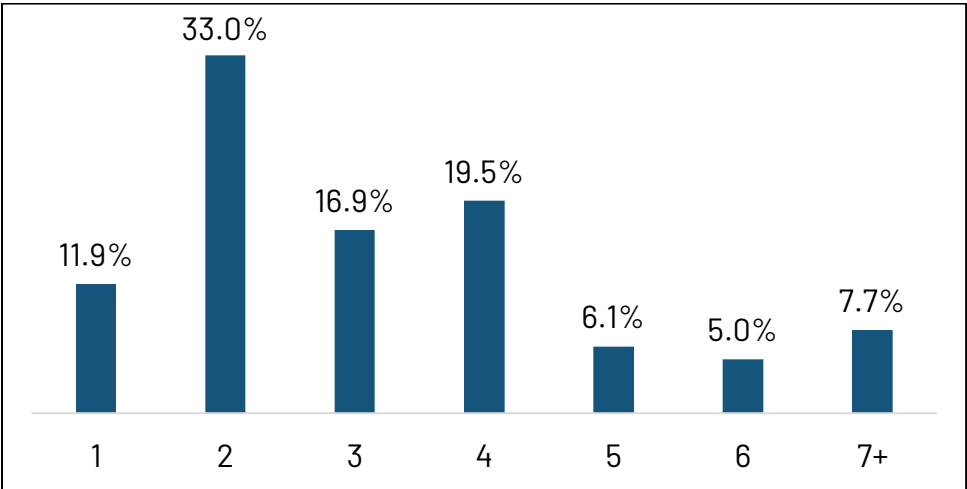


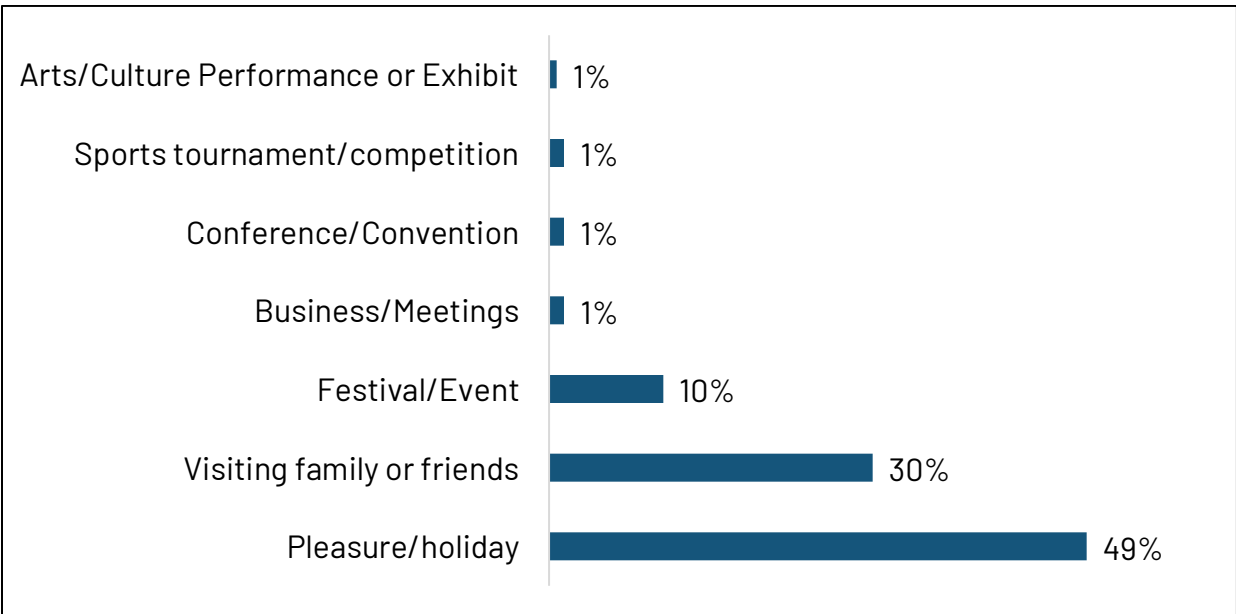
Figure 4: Travel Party Size



Reason for Trip & Importance of Attractions

Nearly half of all visitors (49%) travelled to the Cowichan Region for pleasure or holidays. Visiting family and friends (30%) and attending a festival or event (10%) were the second and third most common responses (Figure 5). The focus on festivals and events versus other reasons (sports, arts or cultural performances) may be overstated as data were collected at Sunfest (Laketown Ranch) and in Lake Cowichan during Sunfest.

Figure 5: Stated Purpose of Travel



Participants were asked how important different destination features, attractions and characteristics were to their decision to visit (1=not at all important & 5=very important). Participants identified the overall atmosphere ($M=4.2$), parks and public spaces ($M=4.2$), outdoor adventure activities ($M=3.9$), and easily accessed destination ($M=3.9$) were the most important factors. Figure 6 illustrates the factors that were identified as important (dark blue), neutral (green) or unimportant (light blue) using average scores. Figure 7 illustrates the distribution of responses from *not at all important* to *very important*.

Figure 6: Average Importance of Destination Characteristics

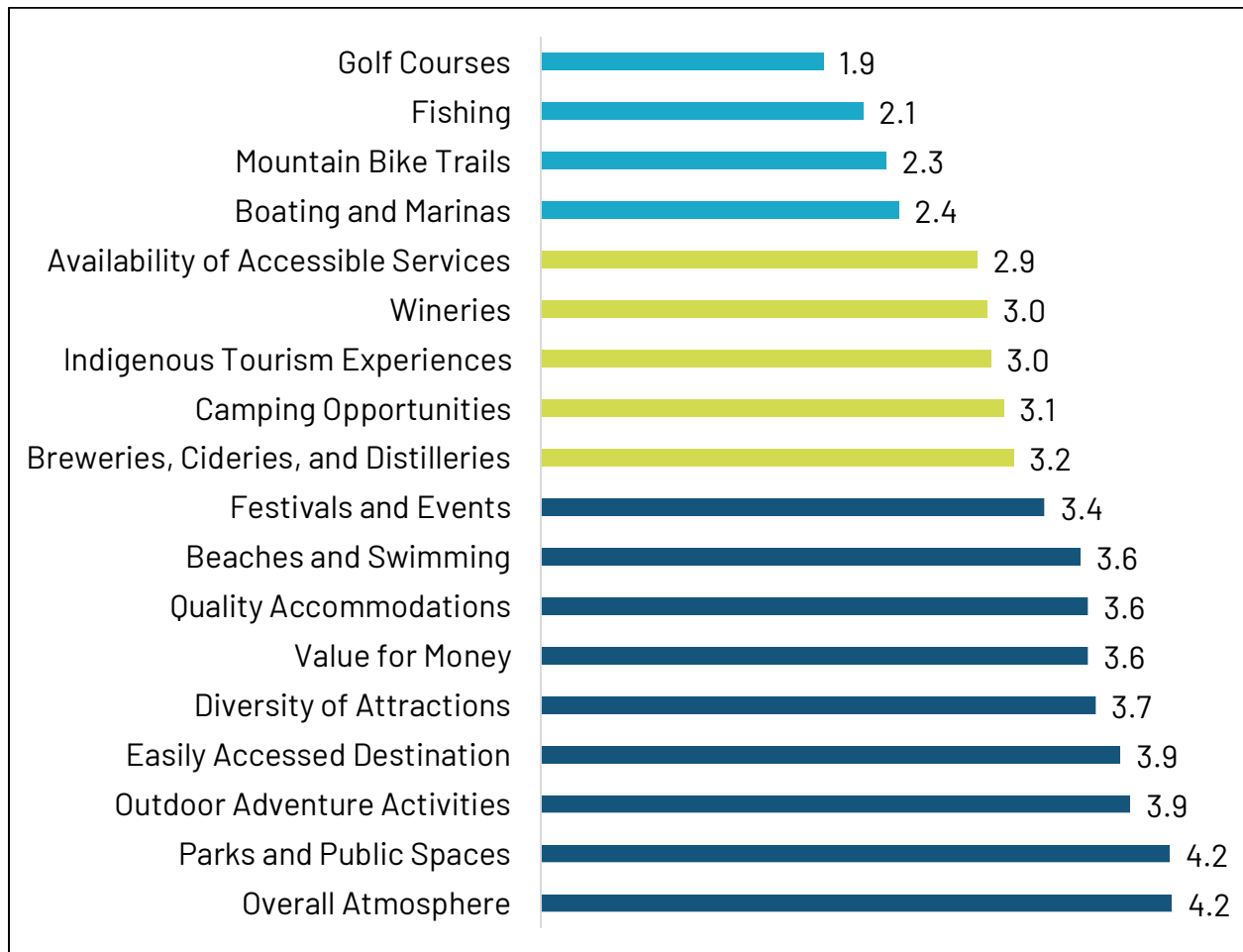
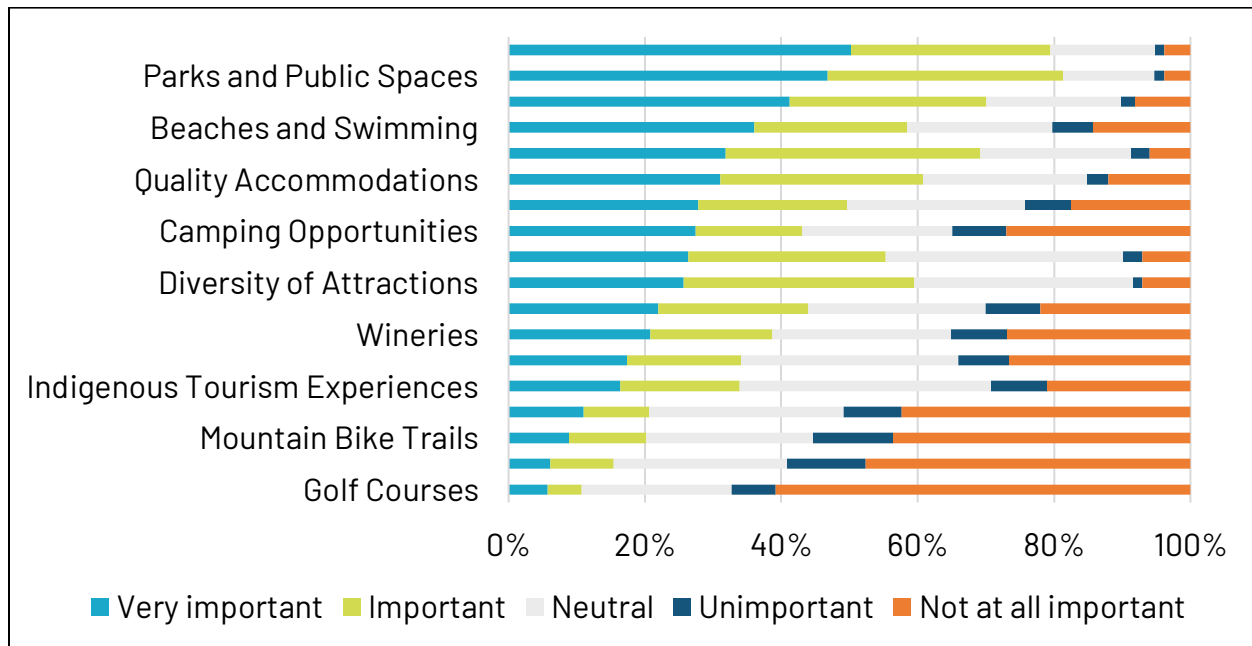


Figure 7: Level of Importance of Destination Characteristics



Travel Behaviours

While 15.6% of visitors were day-trippers, others were most likely to stay one (12%), two (15.6%), or three (12.7%) nights (Figure 8). Of those who stayed at least one night (Figure 9), visitors were most likely to stay in Lake Cowichan (39.8%), Cowichan Bay (27.8%), Duncan (26.5%), and Ladysmith (21.6%).

Figure 8: Trip Duration – Number of Nights

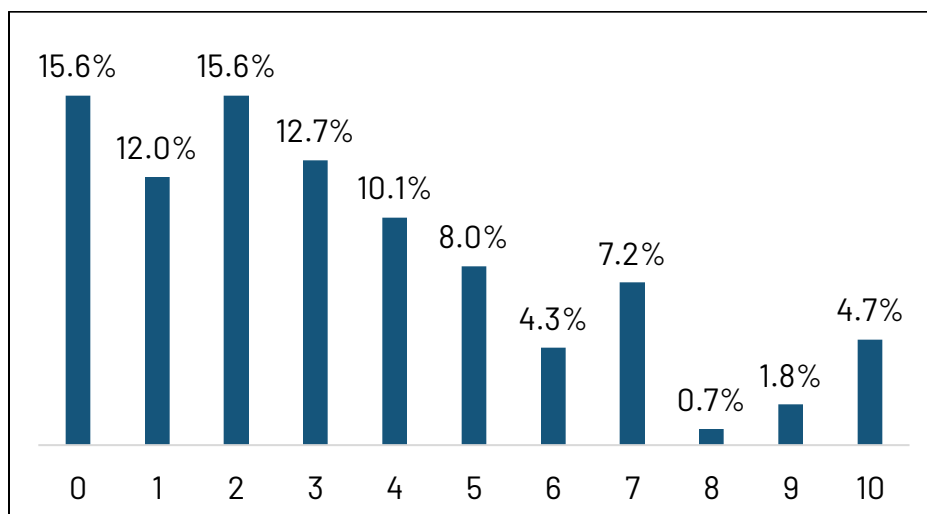
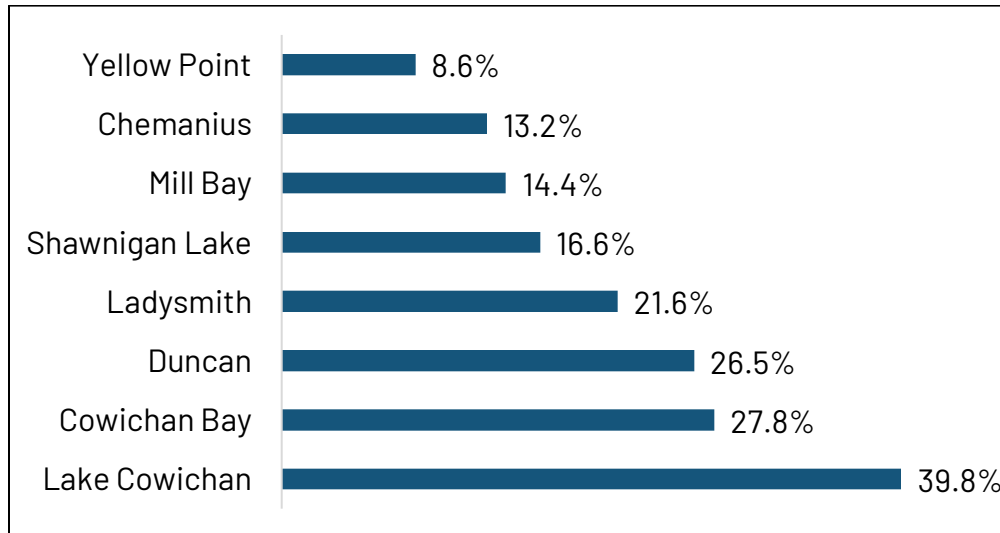
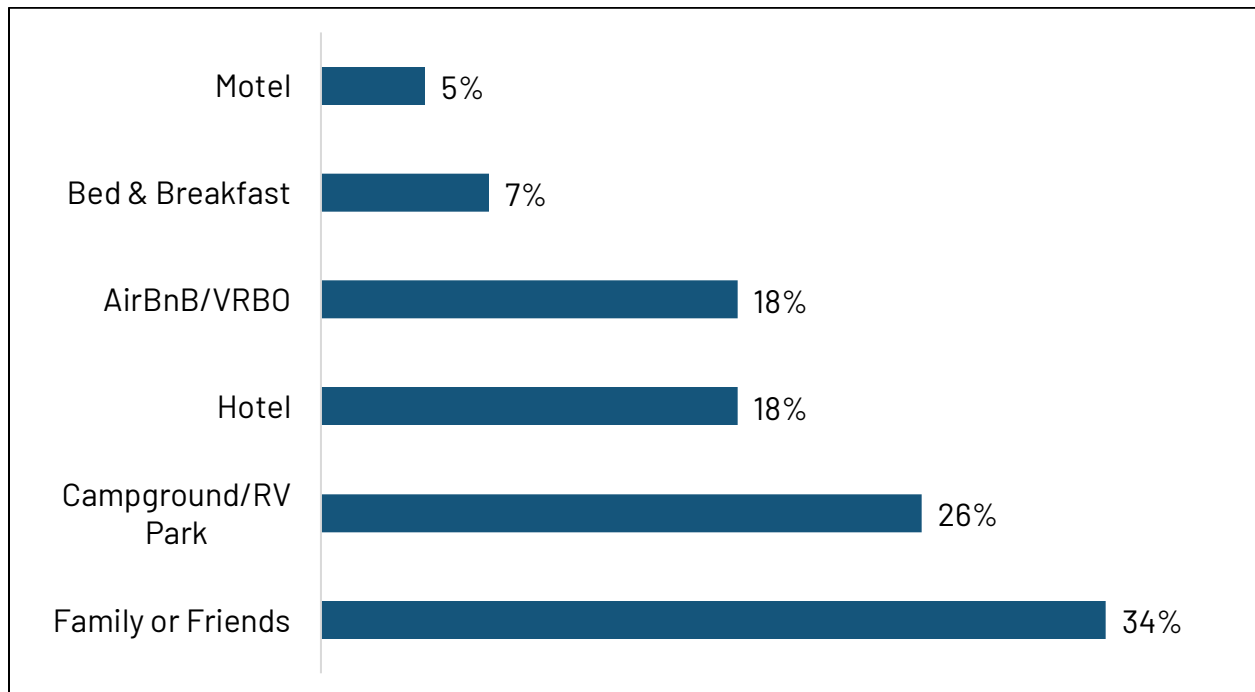


Figure 9: Percentage of Visitors Who Stayed in Each Community



Most visitors who stayed in the Cowichan Region spend their time at the homes of family or friends (34%) or in campgrounds/RV parks (26%). Hotels (18%) and short-term rentals like AirBnB/VRBO (18%) saw the same percentage of visitors (Figure 10).

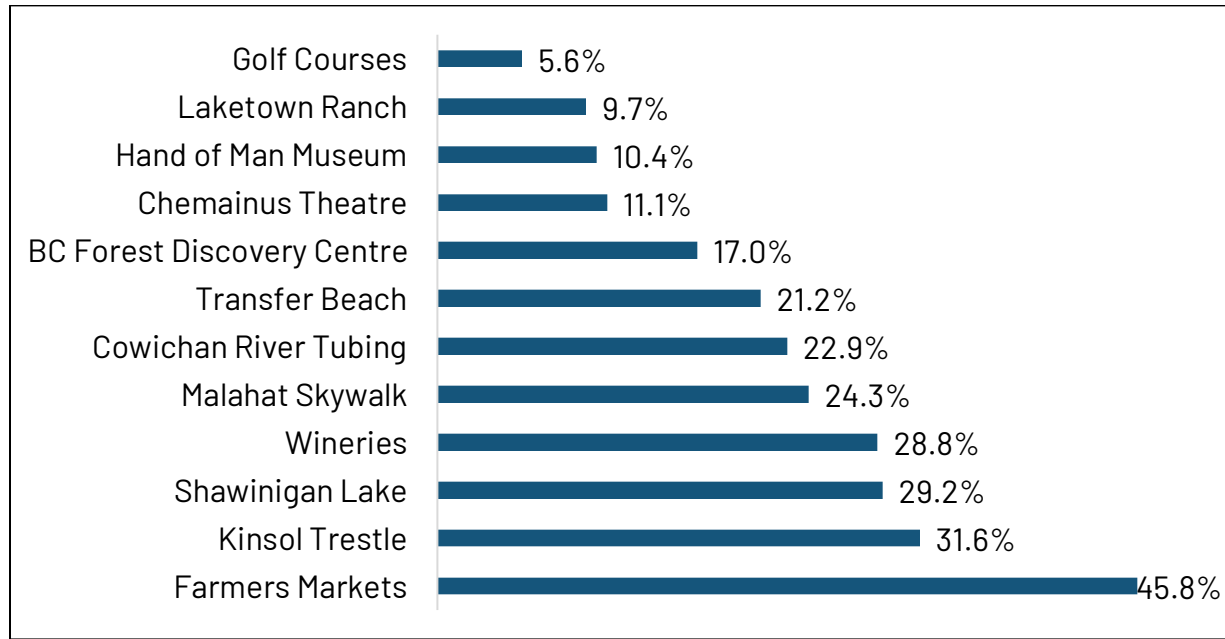
Figure 10: Where Visitors Stayed when in the Cowichan Region



Data collection locations likely impacted the percentage of participants who visited various Cowichan Region attractions. Farmers markets (45.8%), the Kinsol Trestle (31.6%),

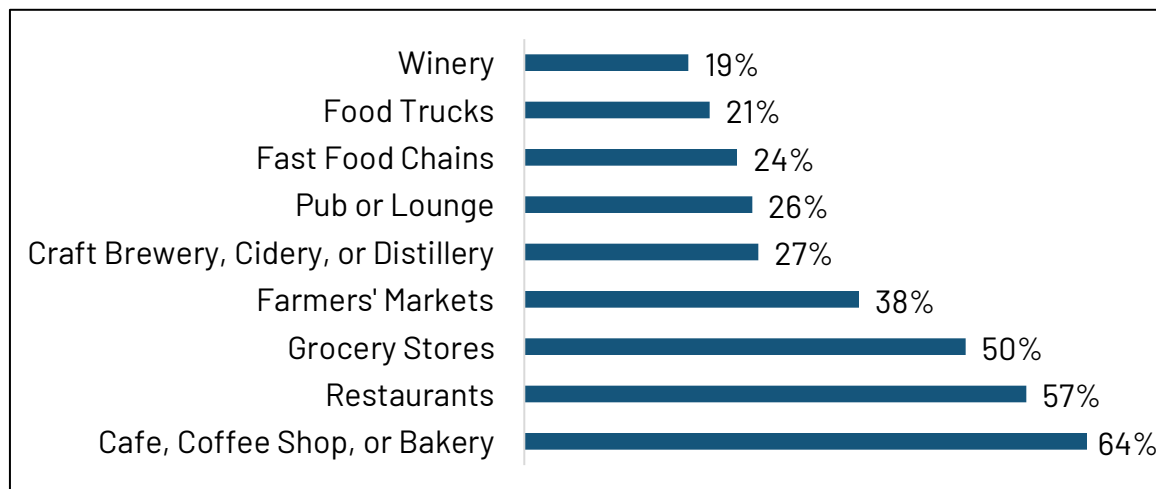
Shawnigan Lake (29.2%) and wineries (28.8%) were the most visited attractions. Figure 11 illustrates the percentage of participants who visited the listed Cowichan Region attractions.

Figure 11: Percentage of Participants who Visited Cowichan Region Attractions



At least half of the participants purchased food or beverages at cafes or coffee shops (64%), restaurants (57%), or grocery stores (50%). Wineries (19%), food trucks (21%), and quick service chains (21%) were the least likely places for visitors to eat or drink (Figure 12).

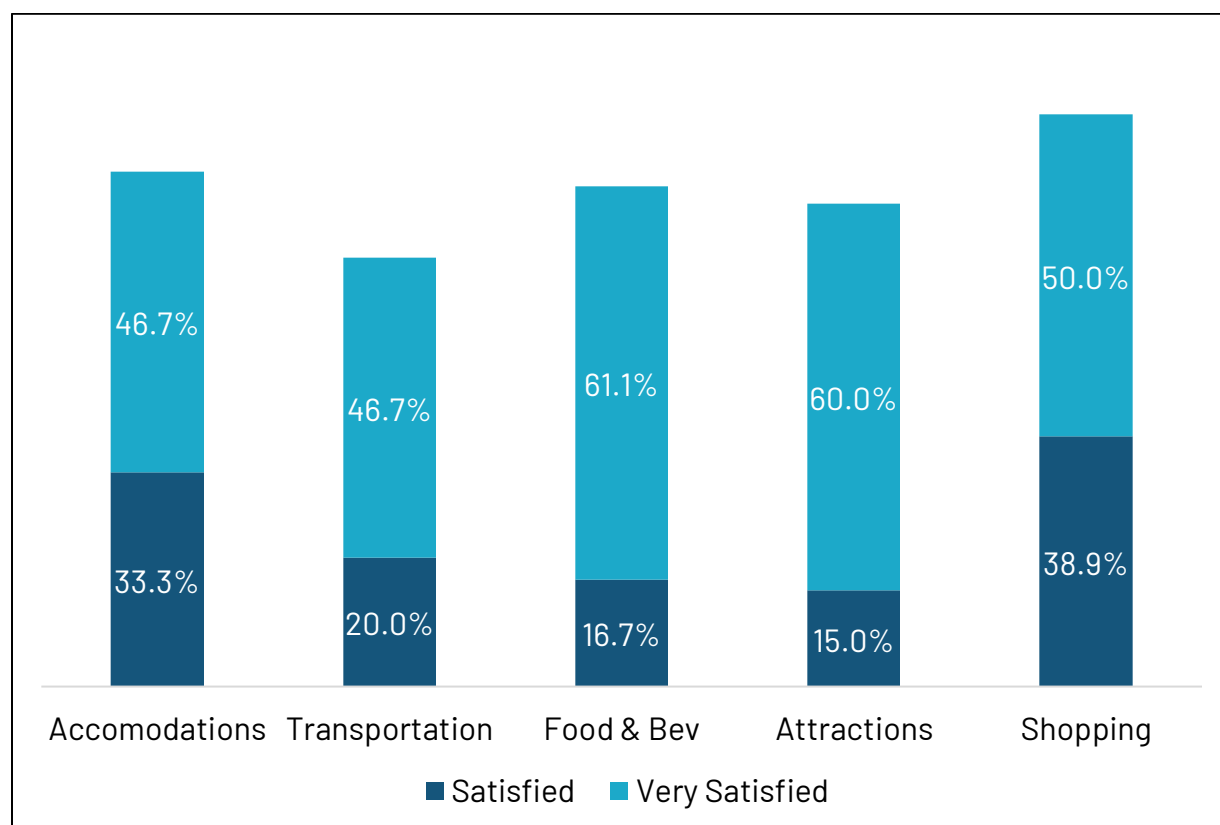
Figure 12: Where Visitors Purchased Food and Beverages (%).



Accessible Services

Accessible services were needed by approximately 8% of visitors (n=23) or a member of their travel party. This sample size is not large enough for decision-making purposes; however, the satisfaction levels of these visitors suggest that service providers in the Cowichan Region are doing well. Transportation (66.7%) had the lowest percentage of participants indicating that they were satisfied or very satisfied, and shopping (88.9%) had the highest (Figure 13).

Figure 13: Satisfaction with Accessible Services (%; n=23)



Net Promoter Score

The Net Promoter Score (NPS) was measured by asking participants how likely they are to recommend that family or friends visit the Cowichan Region on a scale of 1-10. Scores 1-6 are deemed detractors, 7 or 8 passives, and 9 or 10 promoters. The NPS is calculated by subtracting the percentage of detractors from the promoters. Interpreting a destination's NPS is both an art and a science; the usefulness comes from benchmarking

and a better understanding what visitors say about your community. [Tourism Saskatchewan](#) (2022) has identified detractors as likely to actively recommend against your destination and potentially spread negative word-of-mouth. Promoters are satisfied visitors who are likely to be loyal and to recommend your destination. They also noted that they are focused on measuring the NPS of non-residents; therefore, four different NPS scores are presented: Overall NPS (Figure 14), Island residents (Figure 15), BC (not Island) residents (Figure 16), and non-BC residents (Figure 17).

Non-residents of BC (29.8%) represented the smallest portion of the sample; however, they had the highest NPS (62). Islanders were the largest visitor group (35.5%), but their NPS (53.8) was much lower. The primary difference between non-BC Residents and the other groups was the lower percentage of passives.

Figure 14: Overall Net Promoter Score

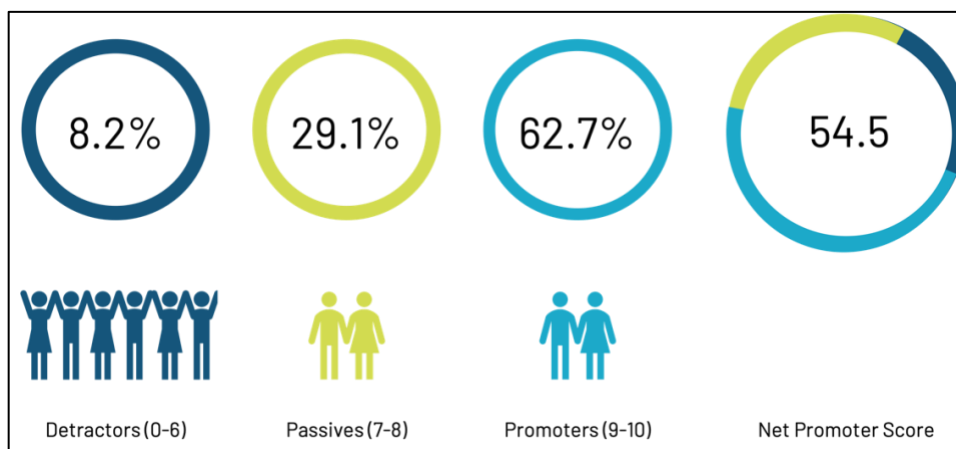


Figure 15: Island Residents Net Promoter Score

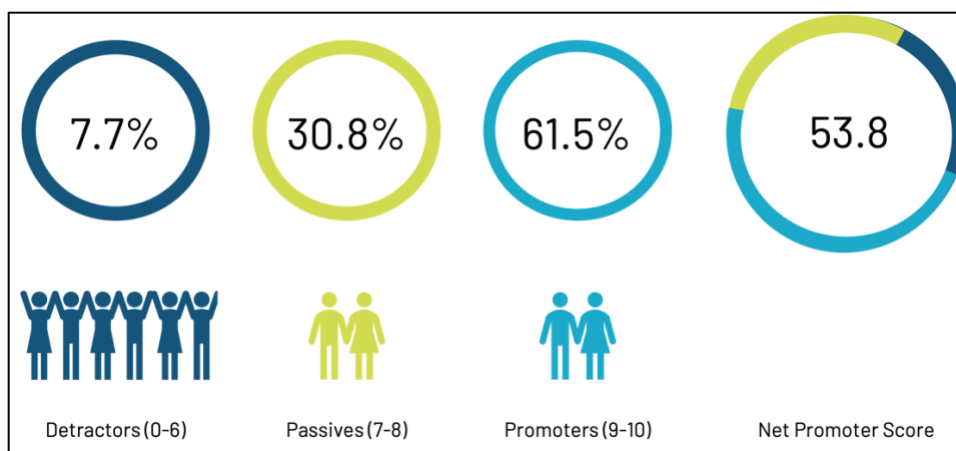


Figure 16: BC Residents (not Island) Net Promoter Score

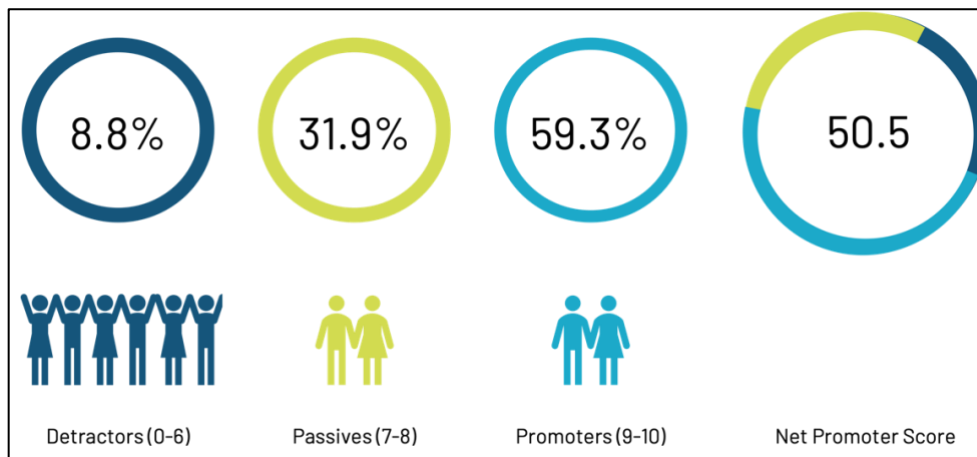
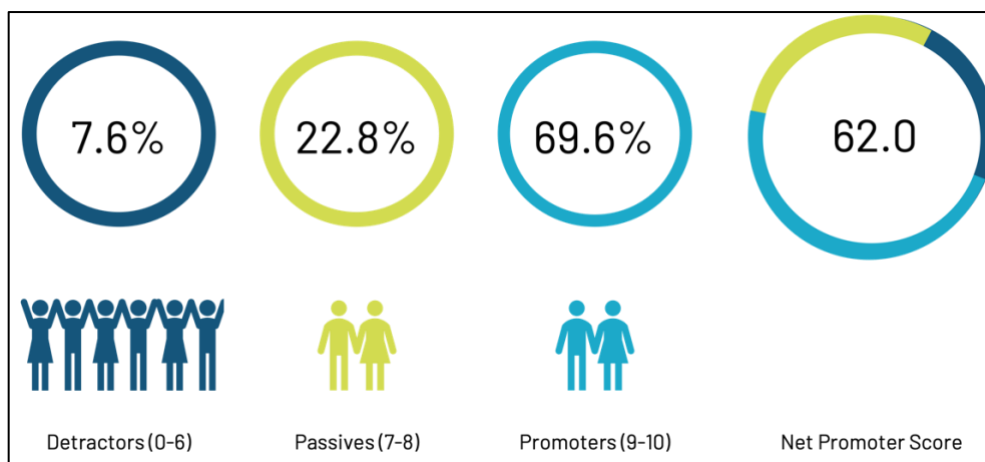


Figure 17: Non-BC Residents Net Promoter Score



NPS Qualitative Comments

The second part of the Net Promoter Score is a question asking participants to explain why they gave the answer. To better understand the participants' comments, they have been organized into three groups: Detractors, passives, and promoters. Comments have not been edited, and duplicates were not removed.

Detractors

Not all detractors provided reasons for their ranking. Those who did noted the following issues:

- Beautiful BC
- Beautiful places here, but similar to other places in the island.

- I just arrived
- I probably wouldn't come if my friend wasn't here.
- I would only come for Sunfest
- It seems like a beautiful area, but not too much to do here outside of special events that isn't available closer to home.
- It was okay I guess but not very special overall compared to other regions on our trip like Pacific Rim Np or Jasper Np
- Just got here and it already looks nice
- Neutral
- Not much to do when weather is bad
- Not sure either way. At a concert
- Only here for Sunfest
- We went on a Sunday and Monday and many things were closed. There were limited stores to visit and the hotel beach was near a marina so the ocean water wasn't good for swimming.

Passives

Comments by those in the passive category are often positive; however, they are still less likely to actively promote the destination and have a lower level of commitment to the destination than promoters. The following comments are from those in the passive category:

- Beautiful area
- Beautiful place to visit with family
- Beautiful place. Lots of outdoor activities
- Beautiful, but pricey to eat and drink out
- Because
- Cool place and close to Victoria
- Decent scenery and tourism options
- Did not feel "touristy" and crowded. Relaxing and fun
- Enjoyable
- Enjoyable, relaxed, but could use higher end amenities
- Enjoyed our time there.
- Excellent place if you enjoy the outdoors
- Expectation
- Food close too early
- Fun
- Fun places for a trip with young kids
- Great atmosphere and beautiful scenery.

- Great hotel (Villa Eyrie). Skywalk was a great activity as well. Lots of beautiful hiking trails and provincial parks.
- Great swimming in the lake and Sunfest is worth the heat
- I love it here but wish others didn't like it so much- its getting crowded with all the influx of people moving from back east. At least there are plenty of mountains to escape to but even those are getting more crowded!
- I was really impressed with all the things and information available by just walking the streets of Duncan
- I would like to return and visit the wineries
- Interesting and beautiful scenery
- It was fine
- It was great, but since it is small / remote there weren't closely accessible grocery stores which was challenging for our large group gathering.
- It was ok
- It's a beautiful place that has a lot to offer, I never really give a 100% to anything because I always believe there's room for improvement somewhere lol
- It's a lovely place to be
- It's beautiful
- It's beautiful, laid back
- It's been a relaxing blast.
- It's close by and has lots to do
- It's lovely here, and while we are camping this trip there are lots of things to do or see
- It's nice but not as nice as Nanaimo
- It's very warm here and it's nice to swim
- Just passing through but it is beautiful
- Lacking something
- Lots to do, local attractions and outdoor activities
- Lots to see and do there!
- Loved it, but understand that it might not be for everyone
- Lovely people and atmosphere
- Nature
- nice area, but only experienced 1 town
- Nice area, need to let people know that Duncan is really nice once you get away from the highway.
- Nice destination that was not too far from home. Good value

- Nice place to visit. Bus tour didn't stay long enough to fully experience the region.
- Only come to work festivals
- Overall experience
- Relax atmosphere and local events
- Some of the outdoor activities providers were not accessible by their direct contacts and most never responded. Due to water pollution around the bay, especially around Oceanfront hotel swimming was not an option. Mountain bike stores have very limited range of bicycles. Scuba diving centres and tour operators do not service over the weekdays. Only Saturdays which is a shame to have missed my diving opportunities here
- Sunfest rocks
- The brief, 1 hour stop was pleasant and I wish I had more time. I would have looked at the murals and walked on the beach
- The Cowichan Region is nice but still needs some work. Disorganized
- The murals in Chemainus were great and it such an inspirational story on the little town that did.
- There's lots to do
- Trip was enjoyable
- Very peaceful and lovely countryside with enough to do with children
- We really enjoyed the area and the activities offered

Promoters

Promoters were the largest group and provided the most comments. These are not presented in any order and like other groups, the comments were not edited and duplicates were not deleted.

- Access to nature
- All good
- Always enjoy coming Byers and there is lots to do. Just here on a day trip this time.
- Amazing beauty and fun things to do.
- Atmosphere and ambiance
- Beautiful
- Beautiful area
- Beautiful area with lots to offer and things to do, even if I'm not partaking in them today

- Beautiful area with lovely campground. Easy access to many lakes and swimming holes. Yummy food, and we come from a big city with lots of food choices.
- Beautiful here with lots to see and do
- Beautiful lake. Friendly people. Easy access from Victoria.
- Beautiful landscape
- Beautiful place and welcoming residents
- Beautiful place to visit
- Beautiful place worth visiting.
- Beautiful place, quiet, lovely beach, camping is great
- Beautiful scenery, lots of interesting agri-tourism things to do although we didn't have time on this trip to do very many.
- Beautiful, accessible area with multiple options
- Beautiful, relaxing, variety of activities
- Beauty place
- Because Alberta sucks
- Because I love Cowichan
- Because I love the area and I believe it to be one of the best and most underappreciated regions in BC!
- Because it's a beautiful place with beautiful people
- Because of Family
- Because the region has not been ruined by too many tourists. Please keep it that way!
- Because the trails at Kinsol trestle seem very easy to ride and there is nice things to see that are unique, like an old rocking horse and random crafts stall. Had fun riding that creaky old horse and so did my niece and nephew
- Because this place is beautiful and a lot of fun
- Because.
- Cause I come yearly and I love it
- Charming town, very pretty. Loved the murals
- Clean, beautiful and everyone very nice!
- Close by, variety of things to do
- Cowichan Lake is our favourite place to visit!
- Cowichan has something for everyone, they are a unique group of communities that our family loves to experience.
- Cowichan is a nice close getaway
- Cowichan is the best

- Cute, quaint with varied experiences and high-quality food and drink.
Lots to explore in a more laid back fashion outside of the larger towns.
And great access to wineries!
- Diverse activities
- Excellent all round
- For people who love the outdoors, or wine touring I highly recommend!
- Fun and chill
- Good camping
- Got lots of things to do and not crowded
- Great city to visit
- Great family park
- Great kayaking, good parks, great summer weather, lots of easy to access services and food
- Great place to visit, many opportunities for tourism activities
- Great place, lots to do, cost effective
- Had a great time
- Happy to be by the lake in this beautiful region
- I come here frequently
- I had a great time and will be going back
- I like this place a lot
- I like to come here
- I love it here
- I love the area
- Is beautiful , safe and successful layback nice destination. The centre of everything.
- Is quiet and not too crowd
- Island life is chill
- It has been lovely
- It is beautiful
- It is beautiful here ♥
- It was beautiful, great activities and river float was amazing
- It's a beautiful area with beautiful scenery including ocean and mountain views.
- It's a fantastic place to visit with family and friends. It has so much to explore.
- It's such a beautiful part of Vancouver Island. So much to see and do!
- It's A nice place
- It's a beautiful area with incredible outdoor opportunities and vibrant culture
- It's a beautiful area with something for everyone.
- It's a beautiful place and that is family friendly.
- It's a beautiful place to visit

- It's a beautiful space that we hope to move to one day as well
- It's a cute little town and our tour company is looking to come here in 2023
- It's always a nice vibe at the market
- It's beautiful
- It's charming and lively
- It's close to Victoria and a nice place
- It's fun even in the rain
- It's has really high end vibes in a small town feel
- It's heavenly here - and a unique experience for Australians
- It's lovely
- It's relaxed and not crowded, everybody is very friendly, and there's enough interesting things to do and see.
- It's such a cute wee spot
- Ladysmith is wonderful.
- Laid back , peaceful , relaxing
- Lively community, very friendly, plenty of interesting and varied activities
- Lots of variety of things to do natural and cultural
- Lots to do for families!
- Love the area
- Love the area. Had almost every type of outdoor experience and fun shopping as well.
- Love the area. Will definitely return
- Loved our trip.
- Lovely area!
- Lovely environment
- Music festivals are fun
- Natural beauty, beaches, playgrounds, local food and beverages
- Natural beauty, range of activities, accessible from where I live.
- Nice experience
- Nice huge spaces and farms
- Registration flipping impossible. Once you are here on a sunny day Cowichan lake is beautiful
- Remote accessible location
- Simply da best
- So beautiful
- So beautiful and so much to do
- So beautiful calming with opportunity to be in nature. Scenic and easy drive
- So beautiful with unlimited access to the outdoors and ocean
- Stunnnng and lots to offer for every age group

- Such a beautiful area. Lots to do & see. Very friendly. Good food & accomodation. Easy to get around. Well marked to find things
- Super friendly and very courteous
- The area has so much to offer
- The beaches were main attraction
- The Cowichan Region offers a lot of Green Space, beaches in all directions and friendly staff at every venue. If we use Duncan as the hub there is something a little bit different in each of the surrounding communities.
- The food and scenery are great. No big crowds either.
- The mural
- The tubing experience on Cowichan River was so fun
- Their is a lot of fun activities & nature hikes in Cowichan & surrounding areas.
- There is so much to do, the area is lovely and safe. Visitor center in Duncan is wonderful providing information about what to do. I very much liked the hike up Stoney Hill.
- There's so much to do!
- This is a great place to relax with lots of outdoor activities and beautiful, natural places to see
- Transfer beach= clean bathrooms, lots of parking, lots to do
- Varieties and and feels safe. It's a nice area, seems central
- Variety of activities of things to see and do. Great opportunities to experience nature
- Very friendly and kind people, lots to do, not over crowded with tourists
- Very friendly locals and beautiful scenery
- We didn't have that much time here, we mostly came to visit a cousin. I plan to come back to explore this beautiful area soon.
- We have had a wonderful time in this area. The weather was awesome and the people very friendly.
- We have loved it. Want to come back
- We love it
- We love it here. Community. Nature. Agriculture. Food and drink.
- We love it here. Los of local artisans and shops markets. Peaceful.
- We love the Cowichan area and love all of the amenities popping up

- We love the experience and variety
- We loved it. Lots to do. beautiful
- We saw impressed with the stores and local attractions. Just need more time to visit more often
- We visit every year for the access to nature and quiet camping. For the
- natural beaches and protected areas.
- Weather, beauty
- What a great friendly place plus good food and wine!
- You have lots of interesting things and the raptor centre has birds from all around the world.

Conclusions

Visitors to the Cowichan Region show strong levels of satisfaction and are clearly attracted to the natural beauty of the Region. National landscapes, agritourism products, and a growing mix of attractions and operators provided visitors with diverse experiences.

Most visitors were from Vancouver Island or the rest of British Columbia. While these markets are likely more resilient and predictable than others, there is still an opportunity to increase visitation from markets outside of BC. Any efforts to increase visitor numbers should take into consideration residents' sentiments towards tourism and consider the perceptions of some who feel that levels of crowding are increasing.

The overall Net Promoter Score and those of the different markets provide Tourism Cowichan with benchmarks for improvement. The NPS document from [Tourism Saskatchewan](#) (2022) sets the goal of increasing the NPS by 0.5 points annually, Tourism Cowichan should consider what they wish to improve. It is also noted that BC's NPS was 66, suggesting that there is room for improvement within the province.

Limitations & Considerations

This study is a snapshot of visitors who travelled to the Cowichan Region during the summer and fall of 2022 and the winter of 2023. The use of convenience sampling means that the results are not generalizable to all visitors; however, the sample does provide a broad perspective on the characteristics of visitors and their behaviours.

Members of the Tourism Cowichan Society are encouraged to use the results of this research in combination with the Residents' Sentiment on Tourism study as they plan for future destination development. It is also recommended that they monitor visitor satisfaction and behaviours on a semi-regular basis, with a focus on NPSs for distinct markets.