



Exit Survey Report
June 2007

This summary report was prepared by Dr. Brock Smith of the University of Victoria.

BACKGROUND

The Tourism Victoria Exit Survey is a research initiative of Tourism Victoria that provides market (visitor) information of use by Tourism Victoria and its industry members for making business and marketing decisions. The June 2007 implementation of the TVES was conducted during the third full week of June (21st to 24th).

A four-page survey instrument was administered using a quota sample intercept methodology at Swartz Bay terminal of BC Ferries, the Victoria International Airport, and Clipper Navigation. Three visitor publics were targeted: Rubber-Tire visitors (at Swartz Bay), Air Travel visitors (at the Airport), and Foot Passengers visitors (on the Victoria Clipper). The June sample consists of 258 Rubber-Tire respondents, 130 Air Travelers, and 127 foot-passengers (515 total). Attention was paid to random intercept of respondents until quotas were met. Consequently, study results can be generalized to the population of June visitors within each segment, with the caution that these are low sample sizes. The quota sample methodology means generalizations cannot be made to the population of visitors as a whole as these are influenced by quota size. Relative quota sizes are consistent with previous implementations of the Exit Survey, allowing comparison across years within season.

RESULTS

Where People Live

Area of Origin								
Country	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Canada	271	53.5	194	76.1	76	58.5	1	0.8
International	29	5.7	10	3.9	15	11.5	4	3.3
USA	207	40.8	51	20.0	39	30.0	117	95.9
Total	507	100	255	100	130	100	122	100
Province/State								
BC	182	35.9	166	65.1	16	12.3	0	0
Alberta	37	7.3	13	5.1	24	18.5	0	0
Ontario	36	7.1	11	4.3	25	19.2	0	0
Washington State	66	13.0	13	5.1	0	0	53	43.4
California	30	5.9	13	5.1	6	4.6	11	9.0
Total	507	100	255	100	130	100	122	100
City								
Greater Vancouver	117	23.6	117	45.9	0	0	0	0
Calgary	10	2.0	6	2.4	4	3.3	0	0
Greater Seattle	32	6.5	4	1.6	0	0	28	23.7
Total	496	100	255	100	123	100	118	100

Trip Purpose

Main Purpose of Trip								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Vacation/pleasure visit	232	45.2	93	36.2	28	21.5	111	88.1
Visiting friends/family	124	24.2	74	28.8	44	33.8	6	4.8
Mix of business and pleasure	63	12.3	36	14.0	22	16.9	5	4.0
Business only	54	10.5	34	13.2	19	14.6	1	0.8
Convention/conf./incentive	16	3.1	1	0.4	12	9.2	3	2.4
Sporting event	4	0.8	3	1.2	1	0.8	0	0
Other	20	3.9	16	6.2	4	3.1	0	0
Total	513	100	257	100	130	100	126	100
Note: N = Number of Respondents								

Reason for Visit

Reason for Visit								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	Very Impt.	Not Impt.	Very Impt.	Not Impt.	Very Impt.	Not Impt.	Very Impt.	Not Impt.
Pleasurable previous visit	37.5	18.8	37.8	15.7	32.4	20.6	40.4	23.2
Recommendation	32.4	23.4	29.5	27.9	28.4	23.9	40.2	15.0
Value for money	15.4	29.1	15.1	28.5	9.7	30.6	19.6	29.4
Convenience	32.2	15.1	31.0	17.1	19.0	14.3	42.1	12.1
Scenery/natural environment	57.1	6.3	57.6	8.9	54.1	4.1	58.3	3.5
Part of tour of BC/NW	15.4	55.0	11.0	57.7	8.3	63.3	28.1	44.8
See a particular attraction	24.9	31.1	22.4	33.3	16.9	33.8	34.0	25.5
Recreational activity	22.0	26.7	23.3	23.3	22.7	24.2	19.2	34.3
Experience cultural activity	21.5	31.9	17.2	33.9	23.1	27.7	28.2	31.1
Note: Very Impt. and Not Impt. correspond to the valid percentage of people responding "Very Important" or "Not Important" on a four point scale.								

Titanic Exhibit

Did You Attend the Titanic Exhibit at the Royal BC Museum								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Yes	109	22.5	46	19.4	29	23.8	34	27.2
No	375	77.5	191	80.6	93	76.2	91	72.8
Total	484	100	237	100	122	100	125	100
Note: N = Number of Respondents								

Did Plans to Attend This Exhibit Result In Your Staying At Least One Extra Night In Greater Victoria?								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Yes	20	18.9	15	33.3	1	3.6	4	12.1
No	86	81.1	30	66.7	27	96.4	29	87.9
Total	106	100	45	100	28	100	33	100
Note: N = Number of Respondents. Only those who attended the Exhibit were included in the analysis.								

Information Sources

Information Sources								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Internet	365	76.4	175	76.4	95	76.6	95	76.0
Travel Books	93	19.5	37	16.2	19	15.3	37	29.6
Visitor Centres	50	10.5	21	9.3	9	7.3	20	16.0
Travel Agent / Tour Co.	53	11.1	6	2.6	24	19.4	23	18.4
Other	80	16.8	44	19.3	20	16.1	16	12.8

Satisfaction

Overall Trip Satisfaction							
Total		Rubber Tire		Air Travel		Foot Passenger	
N	%	N	%	N	%	N	%
443	88.8	216	87.8	117	92.1	110	87.3
Note: respondents reporting very or quite satisfied							

Areas For Improvement

Respondents were given the opportunity to write in comments on the questionnaire in response to the question “what changes or improvements could be made to increase Victoria’s appeal as a travel destination?” Only comments that were mentioned more than once are reported below.

Top 10 Areas for Improvement					
Rubber Tire	N	Air Travel	N	Foot Passenger	N
Ferry Pricing	22	Help / Remove Panhandlers	4	Help / Remove Panhandlers	2
More Ferries	8	Better Road Signage	4	Better Road Signage	2
Improve Highways/Traffic	7	Better Info / Maps	2		
Panhandlers	7	Better Shopping	2		
Build a Bridge	5				
Prices Too High	5				
Better Road Signage	5				
More Activities	4				
Ferry Service (General)	4				

Overnight Stay

Overnight Stay in Victoria or on Vancouver Island								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Yes	425	85.5	214	87.7	126	99.2	85	67.5
No	72	14.5	30	12.3	1	.8	41	32.5
Total	497	100	244	100	127	100	126	100

Advanced Booking

How Far In Advance Did You Book Your Accommodation?								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
On Arrival	41	10.6	37	18.7	2	1.9	2	2.4
Less Than A Week	94	24.2	62	31.3	8	7.5	24	28.9
1 to 4 Weeks	93	24.0	52	26.3	24	22.4	17	20.5
1 to 3 Months	118	30.4	40	20.2	51	47.7	27	32.5
More Than 3 Months	42	10.8	7	3.5	22	20.6	13	15.7
Total	388	100	198	100	107	100	83	100

Type of Accommodation

Accommodation of Respondents Who Stayed Overnight												
	Total			Rubber Tire			Air Travel			Foot Passenger		
	%	Mean	Mode	%	Mean	Mode	%	Mean	Mode	%	Mean	Mode
Hotel/Motel	63.9	2.6	1	58.0	2.3	1	59.3	3.9	4	85.4	1.9	1
B&B	4.2	2.7	1	4.3	2.6	2	2.5	3.5	3	6.1	2.0	1
Camping/Trailer	2.9	2.5	1	5.3	2.6	1	.8	2.0	1	0	0	0
Friends/Relatives	18.2	4.2	2	20.3	2.8	2	23.7	6.3	3	4.9	4.7	2
Mixed.	10.8	N/a	N/a	12.1	N/a	N/a	13.6	N/a	N/a	3.7	N/a	N/a

Note: % = Percentage of people who stayed overnight and used that type of accommodation and “Mixed” refers to respondents who used two or more types of accommodation. n/a= not available. Mean and mode are the average number of nights and most typical number of nights stayed by people using only that type of accommodation.

^aLowest mode reported if multiple modes. Cases with missing length of stay and long stays (60 or more days) were excluded from the analysis. **Two stays were 60 days or longer.** Sample sizes for camping and Foot Passenger Friends/Relatives are very small.

Daily Expenditure

Visitor Expenditure								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$100	129	28.0	71	31.3	32	28.6	26	21.5
101-200	104	22.6	58	25.6	21	18.8	25	20.7
201-500	172	37.4	81	35.7	43	38.4	48	39.7
More than 500	55	12.0	17	7.5	16	14.3	22	18.2
Total	460	100	227	100	112	100	121	100
Average Expenditure	\$295		\$255		\$325		\$341	

Note. Average Expenditure is influenced by six Air Travel, three Foot Passenger, and six Rubber-Tire party expenditures of \$1,000 or more.

Visitor Expenditure								
Avg expenditure per person	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$100	250	55.9	137	62.8	53	48.2	60	50.4
101-200	120	26.8	58	26.6	27	24.5	35	29.4
201-500	73	16.3	22	10.1	28	25.5	23	19.3
More than 500	4	0.9	1	.5	2	1.8	1	.8
Total	447	100	218	100	110	100	119	100
Average Expenditure	\$131		\$111		\$158		\$144	
Note. Average expenditure per person is influenced by one Rubber-Tire party expenditure of \$1,000 or more per person.								

Visitor Expenditure On Accommodation								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$50	158	36.5	79	36.4	37	34.9	42	38.2
51- \$100	50	11.5	29	13.4	9	8.5	12	10.9
101- \$150	80	18.5	47	21.7	13	12.3	20	18.2
More than 150	145	33.5	62	28.6	47	44.3	36	32.7
Total	433	100	217	100	106	100	110	100
Average Expenditure	\$125		\$115		\$149		\$120	

Visitor Expenditure On Food & Beverage								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$50	166	38.1	97	44.5	36	34.0	33	29.5
51- \$100	154	35.3	66	30.3	44	41.5	44	39.3
101- \$150	50	11.5	25	11.5	10	9.4	15	13.4
More than 150	66	15.1	30	13.8	16	15.1	20	17.9
Total	436	100	218	100	106	100	112	100
Average Expenditure	\$107		\$98		\$123		\$110	

Visitor Expenditure On Transportation								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$50	382	88.4	204	93.6	86	82.7	92	83.6
51- \$100	43	10.0	12	5.5	14	13.5	17	15.5
101- \$150	1	0.2	0	0	1	1.0	0	0
More than 150	6	1.4	2	0.9	3	2.9	1	0.9
Total	432	100	218	100	104	100	110	100
Average Expenditure	\$22		\$15		\$32		\$26	

Visitor Expenditure On Attractions								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$50	358	84.0	185	85.6	89	87.3	84	77.8
51- \$100	45	10.6	23	10.6	10	9.8	12	11.1
101- \$150	9	2.1	5	2.3	2	2.0	2	1.9
More than 150	14	3.3	3	1.4	1	1.0	10	9.3
Total	426	100	216	100	102	100	108	100
Average Expenditure	\$29		\$23		\$23		\$48	

Visitor Expenditure Shopping								
Expenditure per party	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
0-\$50	352	83.0	193	89.4	83	81.4	76	71.7
51- \$100	38	9.0	14	6.5	8	7.8	16	15.1
101- \$150	8	1.9	2	.9	2	2.0	4	3.8
More than 150	26	6.1	7	3.2	9	8.8	10	9.4
Total	424	100	216	100	102	100	106	100
Average Expenditure	\$39		\$26		\$48		\$56	

Per Person Expenditure by Country						
Daily expenditure per person	Canada		US		International	
	N	%	N	%	N	%
0-\$100	140	62.2	93	48.7	16	64.0
101-200	56	24.9	54	28.3	6	24.0
201-500	28	12.4	42	22.0	2	8.0
More than 500	1	0.4	2	1.0	1	4.0
Total	225	100	191	100	25	100
Average Expenditure	\$112		\$151		\$144	
Note						

Group Composition

Group Composition: Groups with at least one member in each category					
		Total	Rubber Tire	Air Travel	Foot Passenger
Males	<18	8.7	11.1	4.0	8.9
	19-34	23.5	28.3	18.3	19.5
	35-54	32.0	33.6	29.4	31.7
	55+	33.3	31.6	34.1	35.8

Group Composition: Groups with at least one member in each category					
		Total	Rubber Tire	Air Travel	Foot Passenger
Females	<18	8.9	9.8	7.1	8.9
	19-34	26.0	29.5	22.2	22.8
	35-54	31.4	28.7	31.0	77.4
	55+	35.4	29.6	35.7	46.3

Party Size:					
		Total	Rubber Tire	Air Travel	Foot Passenger
Average Adult Males		1.1	1.2	1.1	1.0
Average Adult Females		1.3	1.1	1.4	1.4
Average Party Size		2.6	2.6	2.6	2.6
Note. Average party size is influenced by three large groups of Air Travelers (15, 25, and 30 people) and two large groups of Rubber-Tire visitors (12 and 24 people).					

Performance Ratings

Performance Ratings (valid percent reported)				
	Total %	Rubber-Tire %	Air Travel %	Foot Passenger %
Paid Attractions				
Selection/variety	69.3	61.5	75.3	75.3
Value for money	53.2	48.4	58.2	56.0
Food/Restaurants				
Selection/variety	73.0	68.6	82.6	71.6
Value for money	55.8	56.6	57.9	52.3
Cultural Activity				
Selection/variety	71.1	61.0	78.8	79.3
Value for money	58.5	50.9	68.9	61.3
Retail/Shopping				
Selection/variety	63.1	59.6	72.8	59.4
Value for money	46.5	43.7	53.9	43.8
Transportation				
Accessibility	65.0	53.5	67.0	78.5
Value for money	55.2	42.2	61.2	67.1
Accommodation				
Quality	79.7	68.7	81.1	76.3
Value for money	63.1	58.9	67.8	66.7
Downtown				
Cleanliness	83.2	77.9	87.9	87.5
Safety	76.9	70.3	79.6	85.2

Prior Visit

Previous Visit to Victoria?				
	Total %	Rubber Tire %	Air Travel %	Foot Passenger %
Yes	64.0	79.7	59.6	39.6
No	36.0	20.3	40.4	60.4
If Yes, How Many Times Per Year Do You Visit Victoria?				
Less than One	38.2	27.5	45.5	65.1
1 or 2	24.7	18.8	35.2	30.2
3 or 4	12.2	16.1	10.2	1.6
5 or 6	4.9	7.8	1.1	0
More than 6	20.1	29.8	8.0	3.2

Passports

If You Are A US Citizen, Do You Have A Valid Passport?								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
All Data								
US Citizen With Passport	166	83.0	45	90.0	34	94.4	87	76.3
US Citizen, No Passport	34	17.0	5	10.0	2	5.6	27	23.7
US Citizens, No Passport								
Plan to Get One Next Year	20	66.7	1	33.3			19	73.1
Do Not Plan To Get One	10	33.3	2	66.7	1	100	7	26.9

Note: N = Number of Respondents

Branding

Consistency of "Full of Life" Branding With Their Experience								
	Total		Rubber Tire		Air Travel		Foot Passenger	
	N	%	N	%	N	%	N	%
Very Consistent	205	44.8	75	33.6	66	55.5	64	55.2
Somewhat Consistent	221	48.3	125	56.1	48	40.3	48	41.4
Not Very Consistent	32	7.0	23	10.3	5	4.2	4	3.4

Note: N = Number of Respondents

Activities By Party Members

Activities Participated in By Party Members (%)				
Land Based Outdoor Recreation	Walking/Hiking	Cycling	Golf	Beaches
Total	63.1	2.8	10.3	32.9
Rubber-Tire	62.3	4.0	11.0	42.0
Air Travel	64.5	0.9	19.6	38.3
Foot Passenger	63.0	2.5	0.8	12.6
Exploring/Touring	Visited Parks	Historical Sites	Guided Tours	Outside of Downtown
Total	46.5	32.9	18.3	35.0
Rubber-Tire	50.0	27.5	7.0	29.5
Air Travel	44.9	29.9	17.8	43.0
Foot Passenger	42.0	44.5	37.8	37.0
Water Based Recreation	Fishing	Whale Watching	Kayaking / Canoeing	Diving
Total	4.0	11.0	3.3	0.5
Rubber-Tire	5.5	11.5	3.5	0
Air Travel	3.7	12.1	4.7	0.9
Foot Passenger	1.7	9.2	1.7	0.8
Visiting Paid Attractions	Royal BC Museum	Butchart Gardens	Craigdarroch Castle	Wax Museum
Total	27.2	35.0	8.0	8.0
Rubber-Tire	23.0	22.5	6.0	6.0
Air Travel	33.6	35.5	10.3	7.5
Foot Passenger	28.6	55.5	9.2	11.8
Other Attractions	Bug Zoo	Butterfly World	Undersea Gardens	Miniature World
Total	2.8	4.2	6.3	4.7
Rubber-Tire	3.5	2.5	5.0	4.0
Air Travel	2.8	8.4	7.5	5.6
Foot Passenger	1.7	3.4	7.6	5.0
Cultural Activities	Theatre/Concerts	Galleries/Exhibits	Festivals/Events	Culinary Tours
Total	7.0	14.0	5.8	3.0
Rubber-Tire	7.5	10.9	4.0	4.5
Air Travel	8.3	19.4	5.6	2.8
Foot Passenger	5.1	14.3	9.2	0.8
	Other Paid Attractions			
Total	11.3			
Rubber-Tire	10.5			
Air Travel	9.3			
Foot Passenger	14.3			