

# InterVISTAS

a company of Royal HaskoningDHV



REPORT

## **Visitor Intercept Survey Results – Tofino, BC**

*Prepared for Tourism Tofino  
Prepared by InterVISTAS Consulting Inc.*

20 February 2019

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# 1 Visitor Profile and Behaviour - 2018

This section presents the demographics, decisions and behaviours of visitors to Tofino generated by the visitor survey conducted between June 11<sup>th</sup> and September 9<sup>th</sup> 2018. In total 1,486 visitors were interviewed, though response rates to specific questions varied based on relevance and visitor responsiveness. Where possible, comparison with the prior surveys conducted during the Spring and Autumn 2016 are made.<sup>1</sup>

This section is structured as follows:

- 1.1 details the profile of visitors, including party size and composition, age, gender, occupations and incomes
- 1.2 presents the origin of visitors and their travel choices to Vancouver Island and Tofino
- 1.3 examines the purpose of travel of visitors to Tofino
- 1.4 details the accommodation choices of visitors, along with length of stay and average trip lengths
- 1.5 outlines the participation of visitors in activities and attractions
- 1.6 examines the satisfaction of visitors and calculates the 'Net Promoter Score'
- 0 summarises the main messages generated by the visitor survey

## 1.1 Visitor Profile

The profile of visitors is examined in this section. Particular emphasis is placed on the size and composition of visiting parties, along with their demographics. While this profile gives an overview of visitor occupations and incomes,

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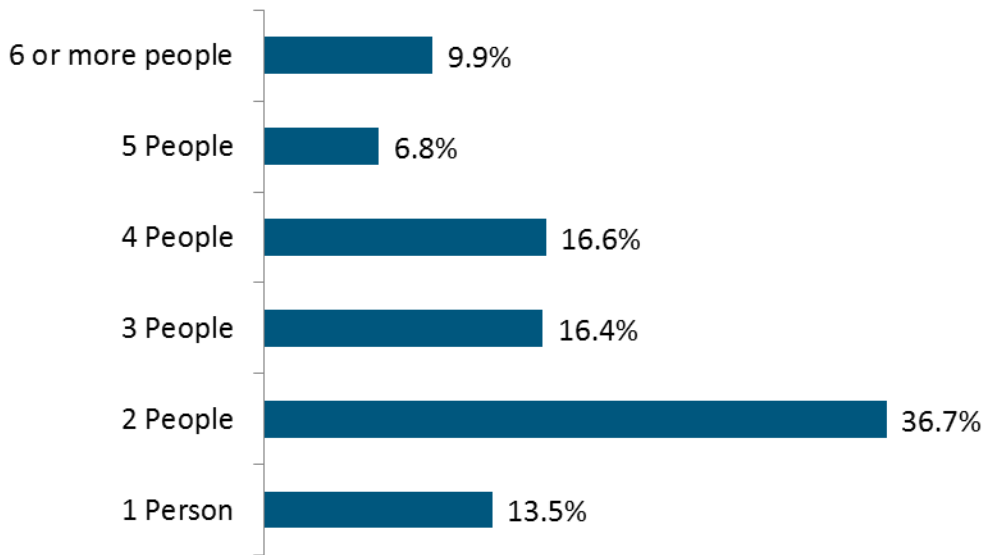
<sup>1</sup> Note that the 2016 survey relied on voluntary engagement and self-completion of surveys which were located at Tofino's visitor centre, whereas the 2018 survey intercepted visitors during their visits to Tofino in locations in the village and beach. The results are therefore not directly comparable due to design and time of year that they collected results.

### 1.1.1 Party Size and Composition

The average party size was 3.3 people and a median of two people; more than a third of visitors were in a party of two people (36.7%). This is largely explained by the proportion of respondents travelling with their spouse/partner (63.3%). **Figure 1-1** below summarises the party size of visitors.

**Average  
Party Size  
3.3**

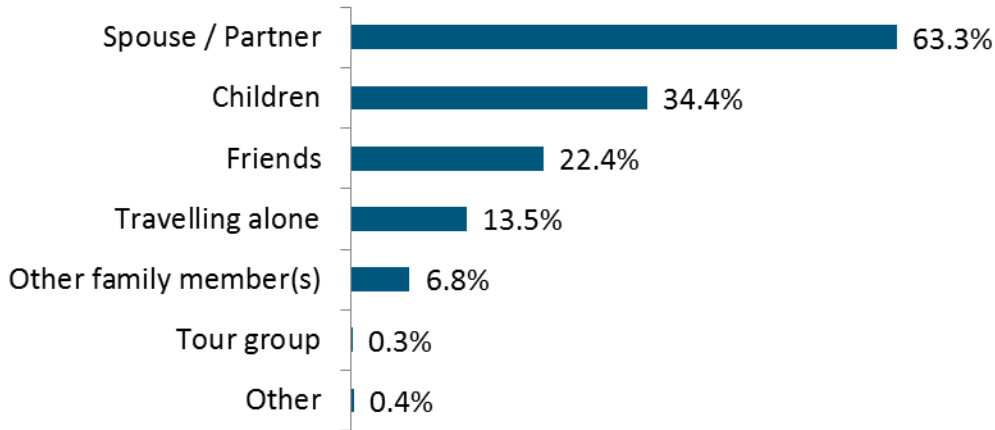
**Figure 1-1: Visitor party size**



Source: InterVISTAS visitor survey and calculations

**Figure 1-2** below outlines the composition of visitor parties. This question allowed multiple responses to capture all the types of companions that respondents were travelling with, and therefore answers do not sum to 100%. Tofino attracts a significant proportion of couples and family units (visitors travelling with their spouses / partners, children and/or other family members). The proportion of people travelling with their spouse / partner is just over 63%, and over three quarters of respondents are travelling with children (34%). The survey captured a small number of responses from visitors travelling in tour groups.

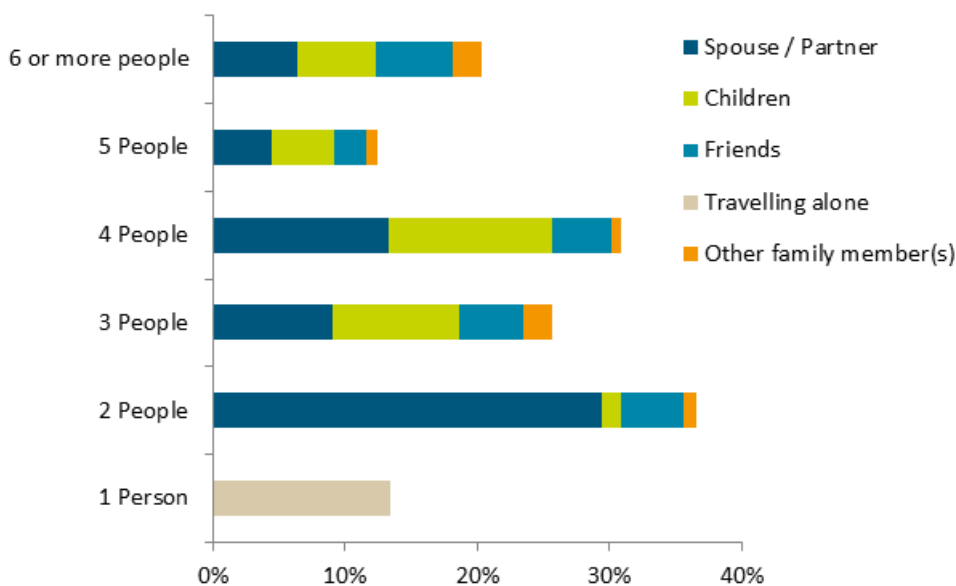
**Figure 1-2: Visitor party composition**



Source: InterVISTAS visitor survey and calculations

**Figure 1-3** shows that the majority of visitor parties of two people comprised of a respondent and their spouse / partner. Similarly, for parties of four people they were typically comprised of a respondent, their spouse / partner and their children. Of the respondents travelling with friends, the greatest proportion were travelling in parties of six or more people.

**Figure 1-3: Party size by composition**



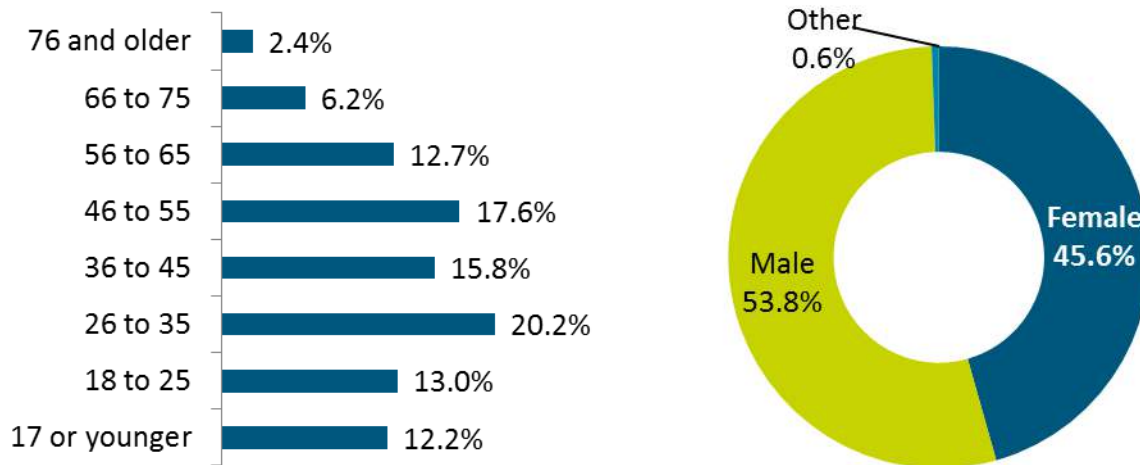
Source: InterVISTAS visitor survey and calculations

### 1.1.2 Age and Gender

Visitors had an average age of 36 and a median age of 34. **Figure 1-4** shows the age profile of visitors and the gender of respondents. A fifth were aged 26 to 35 (20.2%) while a third were aged between 36 and 55. A quarter of visitors were aged 25 or younger.

Slightly less than half of respondents to the survey were female (45.6%). Note that the survey was not designed to capture the gender of other visitors in the respondent's party.

**Figure 1-4: Age of visitors and gender of survey respondents**



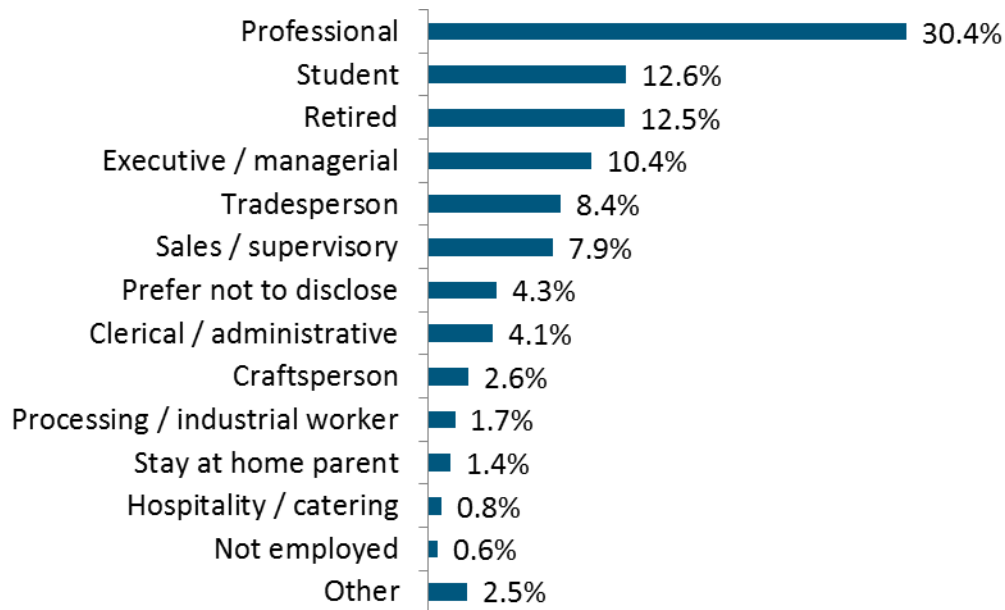
Source: InterVISTAS visitor survey and calculations. Note that gender is based upon the answers of respondents and not all visitors

### 1.1.3 Occupation and Income

Occupations of respondents are summarised in **Figure 1-5**. Nearly a third of respondents had professional roles, while a quarter of respondents were either students or retired (12.6% and 12.5% respectively). Note that the reported occupations are based solely on the 92.1% of respondents that answered this question and not all visitors.



**Figure 1-5: Occupations of respondents**

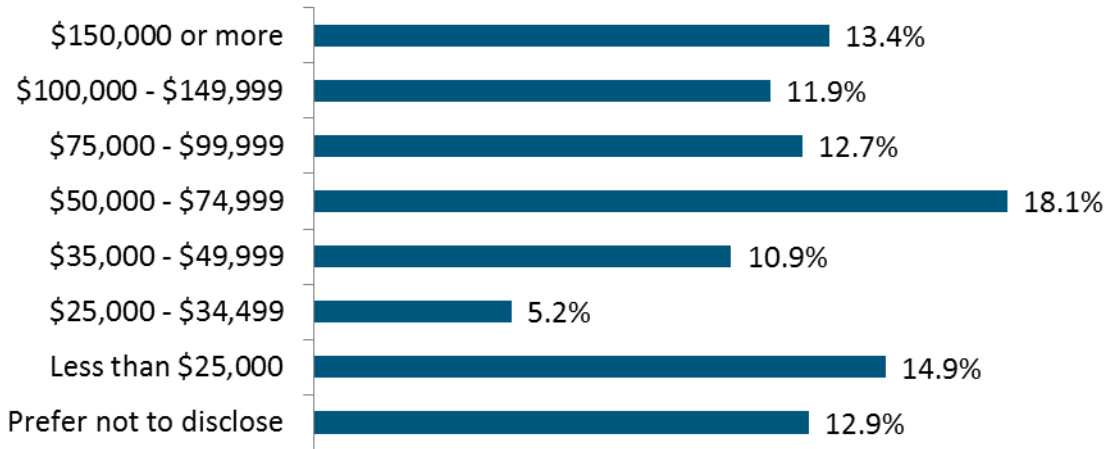


Source: InterVISTAS visitor survey and calculations

**Figure 1-6** shows the income categories reported by respondents. Note that this does not capture the income categories for other visitors in the respondent's parties, and that more than a fifth of respondents (12.9%) decided not to disclose their income.

The income category reported by the most respondents was \$50,000 to \$74,999 (18.1%), though a quarter of respondents reported incomes of \$100,000 or more (25.3%). In comparison, 14.9% of respondents reported an income less than \$25,000. This is primarily due to the number of students captured by the survey, though there were also a small representation of sales / supervisory occupations and retirees in this income category.

**Figure 1-6: Income of respondent**



Source: InterVISTAS visitor survey and calculations



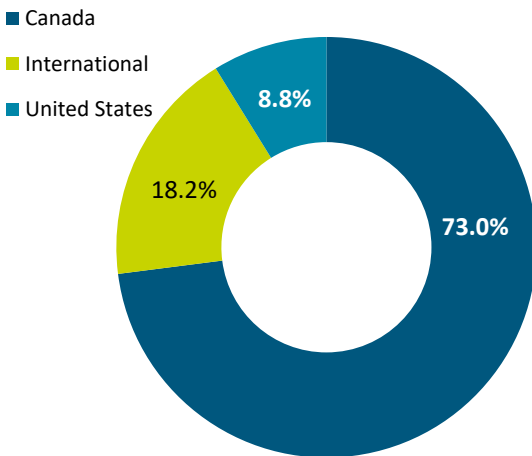
## 1.2 Visitor Origin and Travel to Tofino

This section summarises the origin of visitors to Tofino and their travel choices to get to Vancouver Island and Tofino.

### 1.2.1 Origin

Nearly three quarters of visitors to Tofino are Canadian (73%), nearly a fifth are international (18.2%) and less than a tenth are American (8.8%) (Figure 1-7).

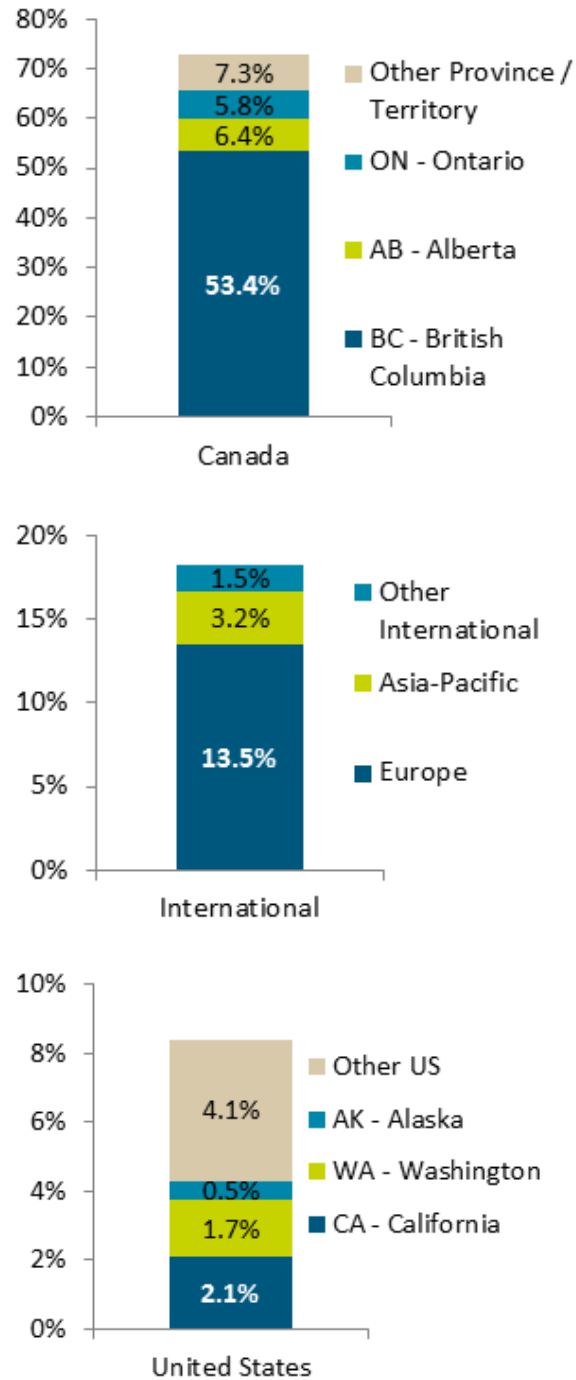
Figure 1-7: Origin of visitors



Source: InterVISTAS visitor survey and calculations

Figure 1-8 summarises the origins of Canadian, International and American visitors to Tofino. More than half of all visitors to Tofino are from British Columbia (53.4%). Alberta and Ontario are the Provinces with the second and third highest proportion of visitors to Tofino at 6.4% and 5.8% respectively. Together other Provinces and Territories of Canada were the origins of 7.3% of Tofino’s visitors. California was the U.S. state with the most visitors to Tofino with 2.1% of respondents; slightly more than Washington (1.7%). Alaska and other states comprised 4.6% of respondents.

Figure 1-8: Origin of Canadian, International and American visitors



Source: InterVISTAS visitor survey and calculations

Nearly a fifth of visitors had international origins (18.2%). **Table 1-1** shows the majority of these were from Europe, which generated 13.5% of visitors to Tofino. The next largest global region was Asia-Pacific with 3.2%, though Australia comprised 60% of the total for the region and 1.9% of all visitors. Excluding Canada and the United States, Germany was the country with the most visitors, accounting for 4.5% of respondents. The UK and Australia were the next countries with the second and third most visitors (3.8% and 1.9% respectively).

**Table 1-1: Country and region of origin of International visitors**

Country / Region	%
Germany	4.5%
UK	3.8%
Australia	1.9%
France	0.7%
Netherlands	0.7%
Other Europe*	3.8%
Other Asia-Pacific**	1.3%
Other International	1.5%

Source: InterVISTAS visitor survey and calculations.

\* Other Europe excludes Germany, UK, France and Netherlands

\*\* Other Asia-Pacific excludes Australia

## 1.2.2 Travel to Vancouver Island and Tofino

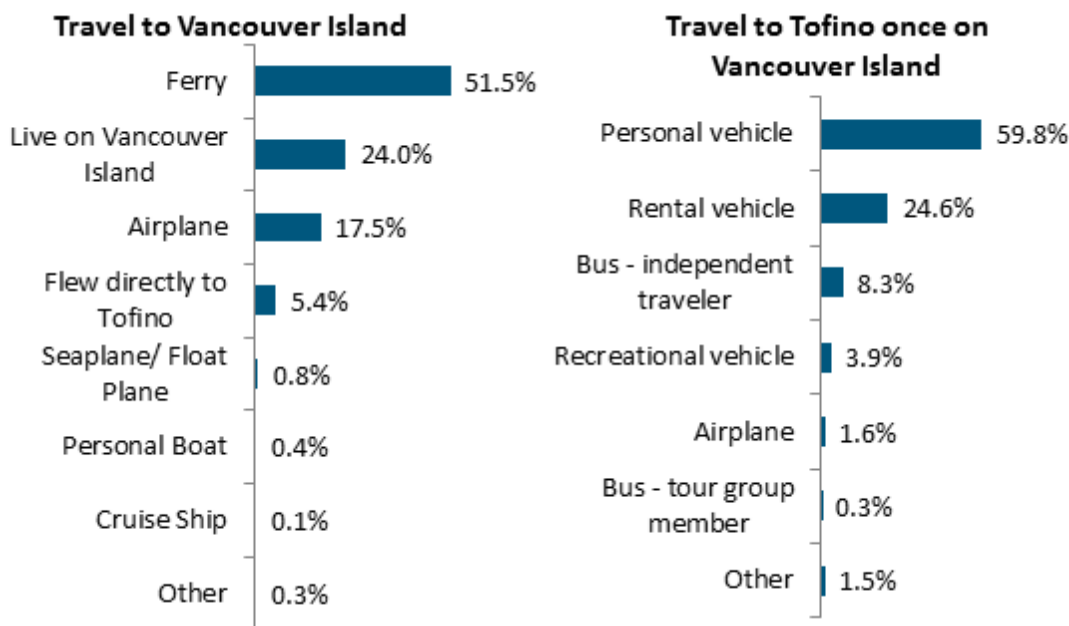
**Figure 1-9** shows the travel choices of visitors to both Vancouver Island and to Tofino once they are on Vancouver Island. More than half of visitors travelled to Vancouver Island via ferries (51.5%) and nearly a quarter already live on Vancouver Island<sup>2</sup> (24%). Together nearly a quarter of visitors travelled to Vancouver Island via airplane (17.5%), seaplane / float plane (0.8%), or flew directly to Tofino (5.4%).

Once on Vancouver Island, almost three fifths of visitors travelled to Tofino with their personal vehicle (59.8%). This is significantly lower than the proportion reported by the Spring and Autumn 2016 surveys (80% and 77% respectively). A further quarter of visitors used rental vehicles to travel to Tofino (24.6%); more than recorded by either the Spring or Autumn 2016 surveys (13% and 15% respectively). Less than a tenth of visitors travelled by bus as independent travelers (8.3%); this is significantly greater than that recorded by the Spring and Autumn 2016 surveys (2% and 1% respectively). It is anticipated that this increase in visitors travelling to Tofino by bus is a result of The Island Bus Co. increasing its daily schedule and adding additional towns to its Victoria and Nanaimo service; as a result connectivity to its Tofino service has improved<sup>3</sup>.

<sup>2</sup> The majority of visitors that already live on Vancouver Island were more likely to travel to Tofino using a personal vehicle (86%) than visitors travelling from elsewhere.

<sup>3</sup> <https://tofinobus.com/company/news/more-victoria-nanaimo-schedules>

**Figure 1-9: Travel to Vancouver Island and to Tofino**



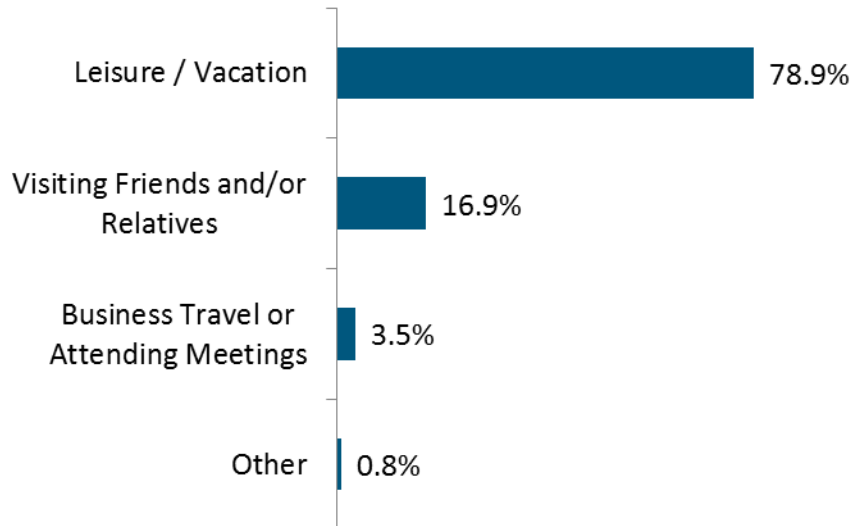
Source: InterVISTAS visitor survey and calculations

### 1.3 Purpose of Visit

**Figure 1-10** shows that the clear majority of visitors' purpose for their trip to Tofino was for leisure / vacation (78.9%). Nearly a fifth of visitors stated visiting friends and/or relatives as the main purpose for their visit (16.9%), while only 3.5% were traveling for business or attending meetings. These breakdowns are similar to the 2016 surveys.

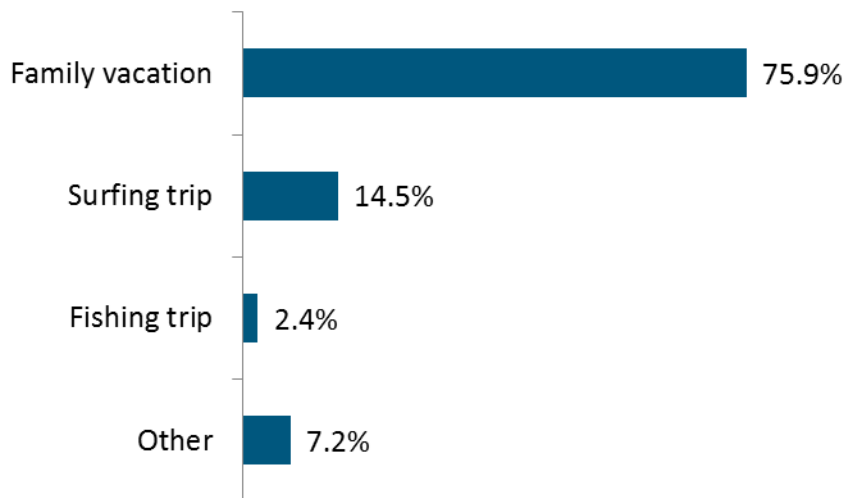
When asked about their top reasons for visiting Tofino, **Figure 1-11** shows that family vacations were reported by three quarters of visitors (75.9%). More than a tenth of visitors stated that surfing was the top reason for their trip (14.5%), and together a tenth of visitors reported fishing (2.4%) or other reasons for their visit to Tofino (7.2%). Other reasons for visiting Tofino predominantly included other leisure, outdoor, adventure or sporting activities.

**Figure 1-10: Main purpose of the trip**



Source: InterVISTAS visitor survey and calculations

**Figure 1-11: Top reasons for visiting Tofino on this trip**



Source: InterVISTAS visitor survey and calculations

## 1.4 Accommodation Choices and Length of Stay

This section summarises the length of visitors' stay in Tofino and accommodation choices. For context, almost 90% of visitors reported that their accommodation was located in Tofino, while the remainder reported staying in Ucluelet (8.1%) and the National Park (1.8%).

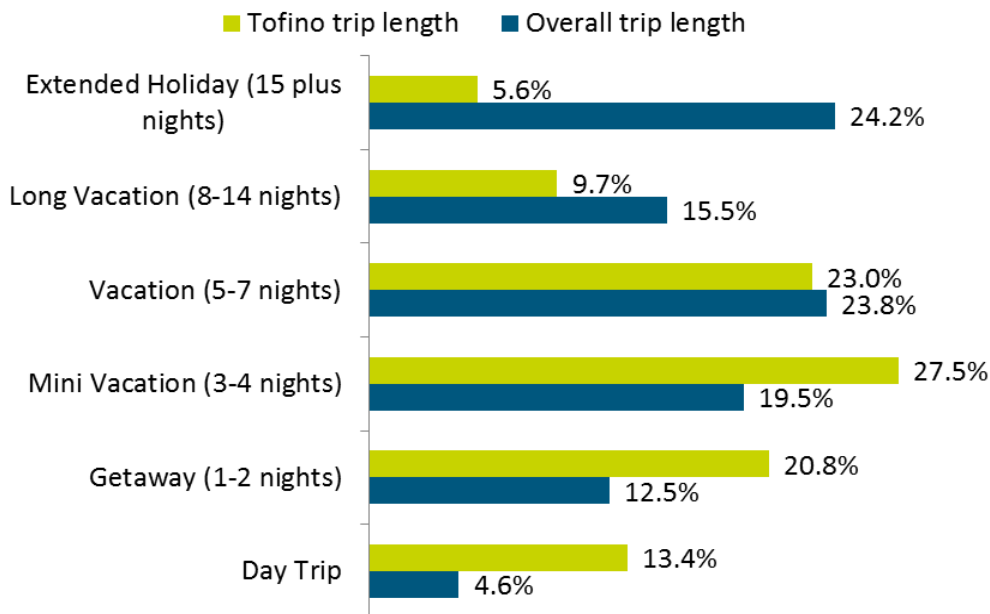
### 1.4.1 Length of Stay

The median overall trip length reported by visitors was 7 nights, though the average was higher at 11 nights due to a segment of respondents taking significantly longer trips. This is comparable to the average overall trip length recorded by the Spring and Autumn 2016 surveys (6.3 and 7.5 respectively). The average number of nights that visitors stayed in Tofino was 4.

In total, 13.4% of visitors to Tofino are day trips, whereas 4.6% of visitors reported a day trip as their overall trip length. **Figure 1-12** shows that most visitors to Tofino took mini vacations of three to four nights (27.5%). In comparison, extended holidays of 15 or more nights were the most reported overall trip lengths by visitors (24.5%); significantly fewer visitors stayed for 15 or more nights in Tofino (5.6%). More than a fifth of visitors reported vacation lengths of five to seven nights in Tofino (23%), almost the same proportion as overall trip lengths reported by visitors (23.8%).

As expected, the reported number of nights in Tofino is lower than the overall trip length. Day trips, getaways of one or two nights and mini vacations of three or four nights accounted for 61.6% of the length of stay reported by visitors; in comparison these accounted for just 31.6% of overall trip lengths.

**Figure 1-12: Overall trip length and length of stay in Tofino**

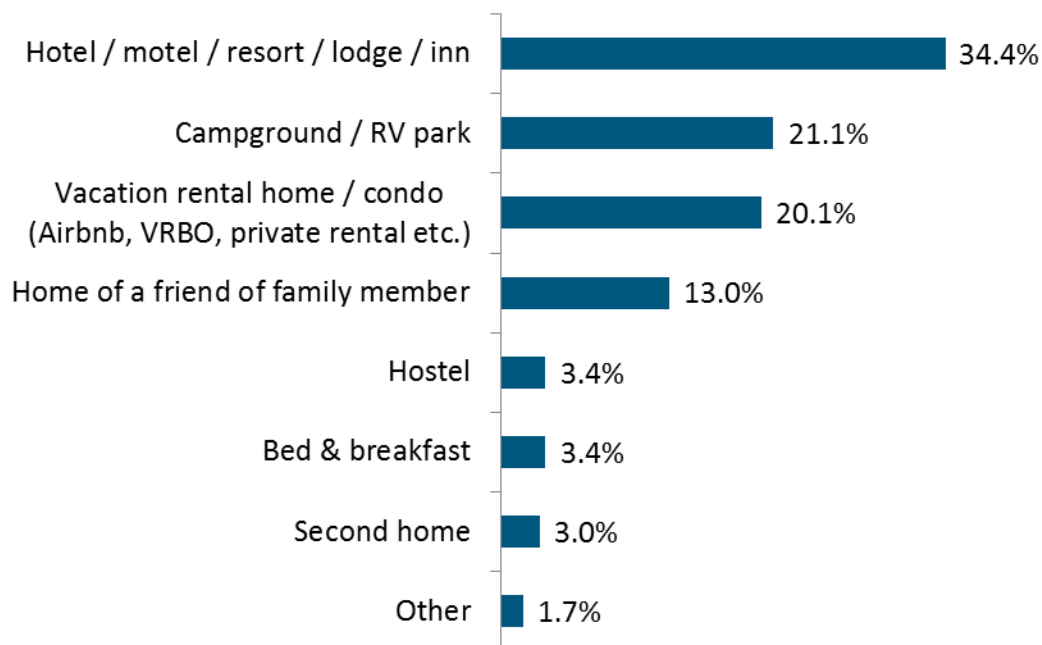


Source: InterVISTAS visitor survey and calculations

## 1.4.2 Accommodation Choice

**Figure 1-13** shows the accommodation choices of visitors. A third of visitors stayed in hotels, motels, resorts, lodges or inns (34.4%). More than a fifth camped or stayed in RV parks (21.1%)<sup>4</sup> and a similar proportion stayed in vacation rental homes or condos, which includes Airbnb's (20.1%). More than a tenth of visitors stayed in the homes of friends or family members (13%), and together less than a tenth of visitors stayed in hostels (3.4%), bed & breakfasts (3.4%) and second homes (3%).

**Figure 1-13: Accommodation choice**



Source: InterVISTAS visitor survey and calculations

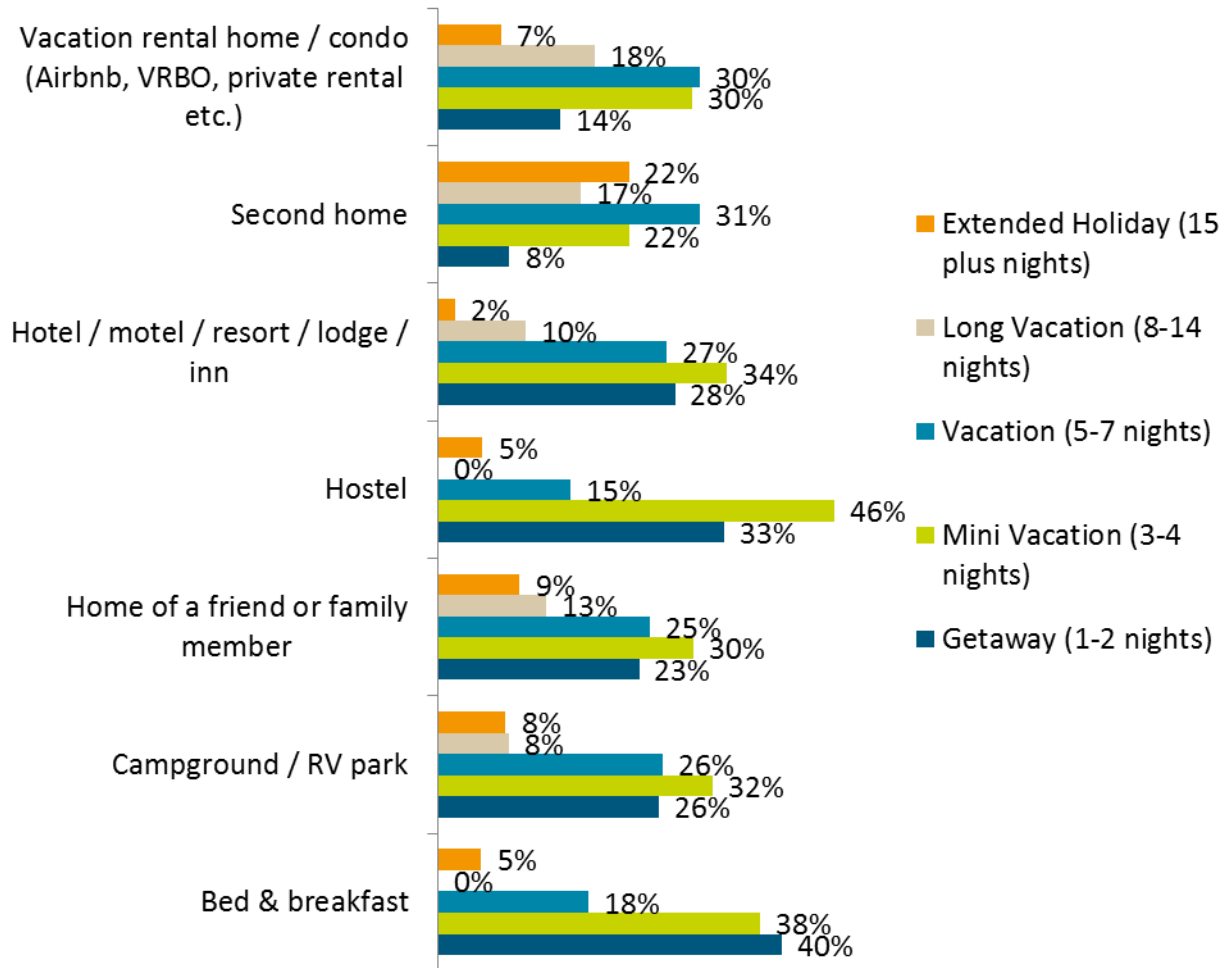
**Figure 1-14** shows the accommodation choices of visitors and their length of stay in Tofino. Note that the stay lengths of visitors staying in 'other' accommodation have been excluded from the analysis due to low response rates.

Bed & breakfasts and hostels were predominantly used for shorter stays, whereas visitors looked at vacation rental homes / condos for longer stays of five or more nights. Most types of accommodation showed a significant drop of visitor stay lengths of five or more nights compared to four or less nights, with the exception of second homes and vacation rental homes / condos.

<sup>4</sup> Of the surveyed visitors staying in campgrounds / RV parks, 35% reported they did not spend any money on accommodation but reported expenditure on other categories such as food and beverage and visiting attractions. Each respondent in this segment of the visitor profile reported that their top reason for visiting Tofino was to surf, and each of them participated in surfing / stand up paddle boarding as an activity during their trip.

Significantly fewer visitors stayed in campgrounds and RV parks for trip lengths of more than seven nights. However, more than a quarter of visitors camped or stayed at RV parks for vacations of five to seven nights (26%). Compared to visitors staying in hotels, motels, resorts, lodges and inns, vacation rental homes / condos had longer visitor stay lengths, especially for long vacations of 8 to 14 nights and extended holidays of 15 or more nights.

**Figure 1-14: Length of stay in Tofino, by accommodation choice**



Source: InterVISTAS visitor survey and calculations. Note: responses from visitors staying in other accommodation have been excluded from the analysis of length of stay due to low response rates.

## 1.5 Participation in Activities and Attractions

**Figure 1-15** below shows the participation of visitors in activities and attractions during their visit to Tofino. These have been grouped into four broad themes of 'culture & history', 'food, drink & entertainment', 'sports and adventure activities', and 'wildlife & nature'. The survey was designed to record the types of attractions and activities that visitors to Tofino participated in but did not capture specific venues or businesses unless mentioned by respondents. For example, visitors participating in

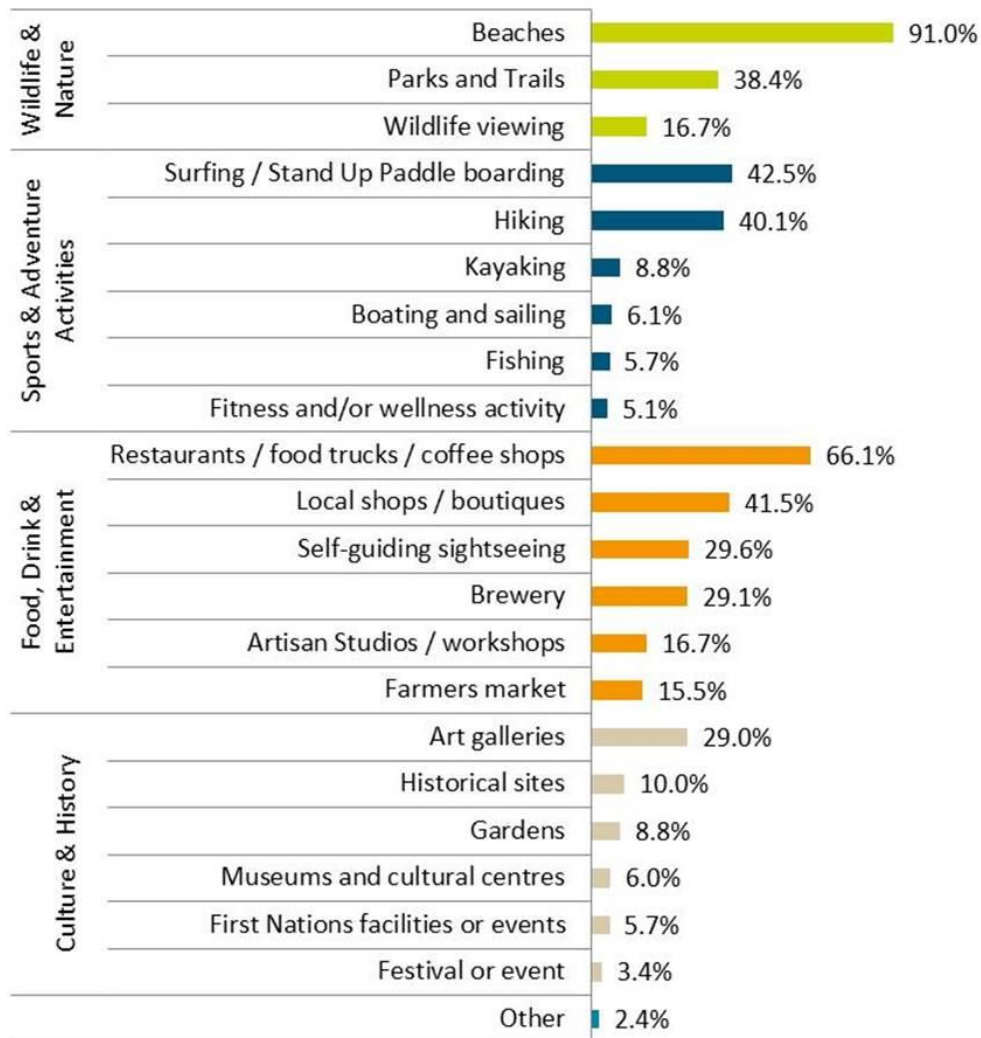


‘wildlife viewing’ were not distinguished between those paying for commercial tours and excursions and those that were self-initiated.” There were 84 respondents in the survey that said they had/would visited First Nations facilities/events, but none of them gave qualitative commentary on specific venues.

Reflecting Tofino’s natural beauty and international reputation as a surf destination, 91% of visitors stated they had or would spend time enjoying its beaches, and 38.4% stated they would spend time on Tofino’s parks and trails. Nearly a fifth of visitors reported they had or would participate in wildlife viewing activities (16.7%).

More than two fifths of visitors reported they had or would surf / stand up paddle board during their visit to Tofino (42.5%), with a similar proportion stating they would hike (40.1%). A fifth of visitors planned to kayak (8.8%), sail (6.1%) or fish (5.7%).

**Figure 1-15: Visitor participation in activities and attractions**



Source: InterVISTAS visitor survey and calculations

Two thirds of visitors to Tofino stated they would specifically visit restaurants, food trucks and coffee shops during their visit (66.1%), nearly a third stated they would visit the brewery (29.1%), and more than a tenth planned to visit farmers markets (15.5%). Almost a third of visitors planned to do self-guided sightseeing in Tofino (29.6%), and less than a fifth planned to visit artisan studios and workshops (16.7%).

Nearly a third of visitors planned to visit art galleries (29%), while only a tenth planned to visit historical sites (10%). Fewer visitors had visited or planned to visit gardens (8.8%), museums and cultural centres (6%), First Nations facilities or events (5.7%), festivals or other events (3.4%).<sup>5</sup>

Just 2.4% of visitors reported participation in other attractions and activities; this emphasises that the survey was accurate in capturing the diversity of Tofino’s offer to visitors. Participation levels therefore provide a good measure of the specific activities that encourage people to visit Tofino, as well as activities or attractions that are comparably less important in generating visits to Tofino.

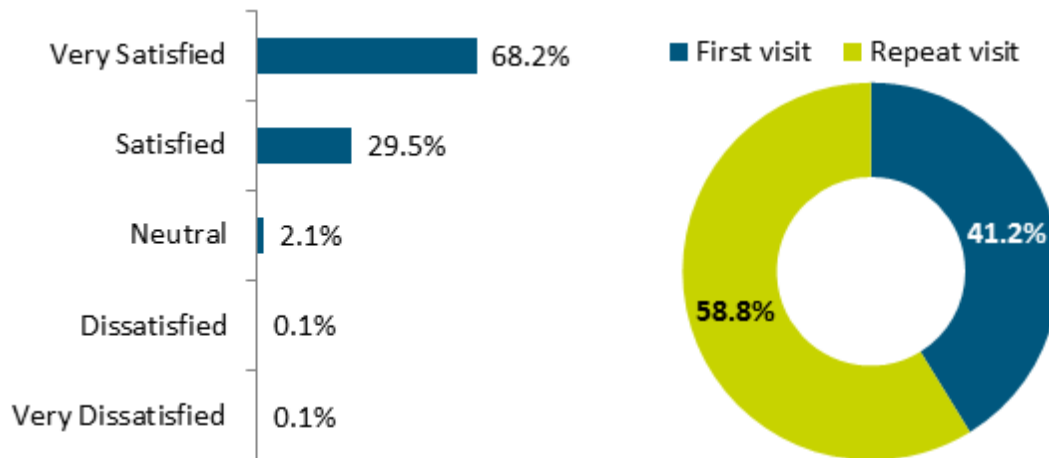
## 1.6 Visitor Satisfaction

This section analyses the satisfaction of visitors with their visit to Tofino.

### 1.6.1 Satisfaction and Repeat Visitation

Respondents reported high levels of satisfaction in their visit to Tofino. More than two thirds of respondents were ‘very satisfied’ with their visit (68.2%) and nearly a third were ‘satisfied’ (29.5%). Only 2.3% of respondents said they had a ‘neutral’ opinion, were ‘dissatisfied’ or ‘very dissatisfied’.

**Figure 1-16: Visitor satisfaction levels and repeat visitation**



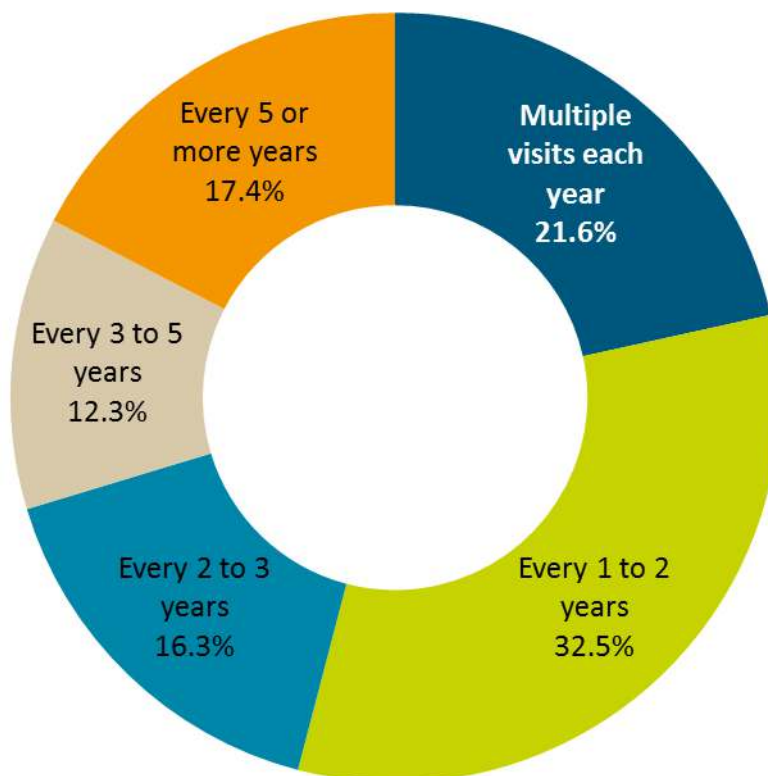
Source: InterVISTAS visitor survey and calculations

<sup>5</sup> It is expected that museum and cultural centre visitation would include locations such as Tofino Clayoquot Heritage Museum, yet no specific details were provided by respondents.

More than half of the respondents were repeat visitors to Tofino (58.8%), compared to 41.2% of first time visitors. The satisfaction of first time and repeat visitors was similar, though no first time visitors reported that they were 'very dissatisfied' or 'dissatisfied'.

Of the repeat visitors to Tofino, more than a fifth visit multiple times a year, and a third visit every one to two years (**Figure 1-17**). More than a quarter of repeat visitors visit Tofino every two to five years and less than a fifth visit every five or more years. Unsurprisingly, the frequency of repeat visits increases for visitors from British Columbia and again for visitors who live on Vancouver Island. For example, the proportion of repeat visitors who visit Tofino multiple times each year is 26.4% of British Columbia visitors and 34.8% of visitors who live on Vancouver Island.

**Figure 1-17: Frequency of repeat visits to Tofino**



Source: InterVISTAS visitor survey and calculations

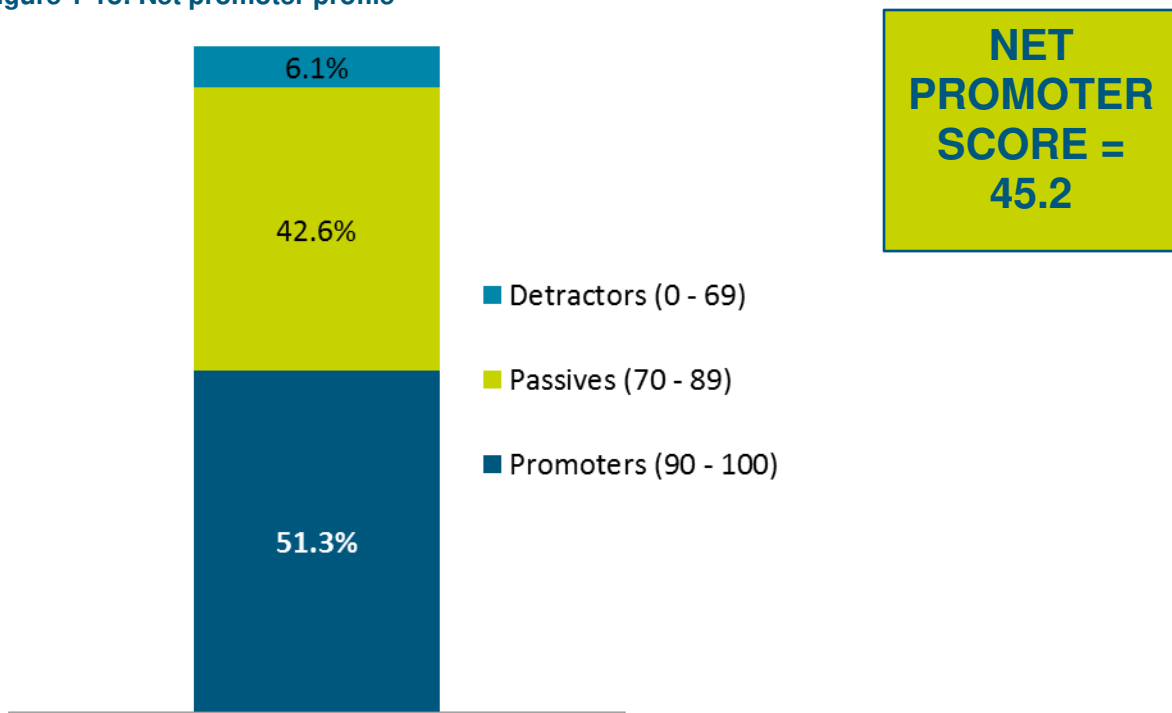
## 1.6.2 Net Promoter Score

A 'net promoter score' is a tool that is used to gauge the loyalty of visitors or customers to a destination or business, and has been associated with revenue growth. At its simplest, a net promoter score measures the loyalty between a provider and a consumer.

Visitors were asked 'how likely are you to recommend Tofino as a travel destination to a friend, family member or colleague?' on a scale from 0 to 100. An answer of 0 meant they were 'not at all likely' and 100 meant 'extremely likely'. Visitors scoring 90 to 100 are called 'promoters' and are likely to make more positive referrals to other potential visitors. Visitors scoring 0 to 69 are called 'detractors' and are less likely to make positive referrals to other potential visitors, or in some cases communicate negative experiences. Visitors scoring 70 to 89 are called 'passives'; their behaviour falls between promoters and passives. The net promoter score is then calculated by subtracting the proportion of visitors that are detractors from the proportion that are promoters.

**Figure 1-18** shows the profile of promoters, passives and detractors of survey respondents. More than half of respondents were promoters, with scores of 90 or higher (51.3%). More than two fifths of respondents were passives, with scores between 70 and 89 (42.6%), while less than a tenth of respondents were detractors with scores of 0 to 69 (6.1%). **This gives Tofino a net promoter score of 45.2** ( $51.3 - 6.1 = 45.2$ ).

**Figure 1-18: Net promoter profile**



Source: InterVISTAS visitor survey and calculations

In comparison, the Spring and Autumn 2016 surveys recorded net promoter scores of 55.0 and 50.7 respectively. The Spring and Autumn 2016 surveys recorded higher proportions of promoters (74% and 72% respectively) and detractors alike (18% and 21% respectively), and smaller proportions of passive respondents. This Summer 2018 survey shows a significant reduction in the proportion of detractors and promoters alike, and an increase in the proportion of passives. While the net promoter score shows a decrease, it is important to note that it is not due to an increase in the proportion of detractors.

A net promoter score above 0 is positive, and a score above 50 is considered excellent. A net promoter score of 45.2 is therefore a highly positive reflection of the appeal of Tofino as a tourism destination and its ability to attract visitors. This is supported by its high rate of repeat visitors (58.8%).

Cross tabulating visitor's net promoter class with other variables highlights some interesting messages. For example, visitors from the United States reported 'excellent' net promoter scores for Tofino of 53.9, notably higher than Canada (44.2) and other international countries (44.7). The length of visitor's stay in Tofino also showed different results in their net promoter score (**Table 1-3**). Day trip visitors recorded the highest net promoter score of 56.8; while the lowest was visitors taking long vacations in Tofino of 8 to 14 nights (net promoter score of 30.3).

**Table 1-3: Net Promoter Score of visitors by length of stay in Tofino**

Length of stay in Tofino	Detractors (0 - 69)	Passives (70 - 89)	Promoters (90 - 100)	Net Promoter Score
Day Trip	4.9%	33.5%	61.6%	56.8
Getaway (1-2 nights)	7.7%	37.0%	55.3%	47.5
Mini Vacation (3-4 nights)	5.0%	36.4%	58.6%	53.7
Vacation (5-7 nights)	6.0%	53.2%	40.8%	34.8
Long Vacation (8-14 nights)	6.8%	56.1%	37.1%	30.3
Extended Holiday (15 plus nights)	9.0%	41.0%	50.0%	41.0

Source: InterVISTAS visitor survey and calculations

## 1.7 Summary

With an average party size of 3.3 and a median of 2, a significant share of visitor parties comprised spouses / partners. Family units of spouses / partners and their children or other family members were also well represented, and groups of friends constitute an important segment of the visitor profile. Visitors to Tofino are typically young with an average age of 36 and a median age of 34.

A diverse range of backgrounds are represented amongst Tofino's visitors. This includes a significant share of higher income professionals and managerial occupations, but students and retirees are an important segment of the visitor profile. Visitors to Tofino are predominantly from Canada (73%) and particularly from within British Columbia (53.4%). However the origin of visitors is internationally diverse, with United States (8.8%), Europe (13.5%) and Asia-Pacific (3.2%) being important global regions for contributing visitors.

The overwhelming majority of visitors' purpose for visiting Tofino is for leisure (78.9%), followed by visiting friends and family (16.9%). The participation of visitors in activities and attractions reflects the primary purpose for visiting; wildlife or sporting related activities such as beaches, parks and trails, surfing / stand up paddle boarding, and hiking were the most popular undertaken. However other types of visitor attractions and activities were well represented and reflect the diversity of Tofino's offer, such as visiting its restaurants and food scene, local shops and boutiques, and art galleries.

Just 13.4% of visitors were on day trips while the remainder were on overnight trips. On average visitors stayed in Tofino for four nights. A third of visitors stayed in hotel / motels, and a further two fifths stayed in campsites / RV parks and vacation rentals (such as Airbnb). More than a tenth of visitors stayed with their friends or family.

Visitors' satisfaction with their trip to Tofino was high. The net promoter score, or propensity to recommend Tofino as a destination to other potential visitors, is high at 45.2.

# Appendix A: Visitor Intercept Survey Methodology

## Visitor Intercept Survey

Tourism Tofino commissioned InterVISTAS Consulting to design and conduct a visitor intercept survey program in 2018. The survey collected information on Tofino visitor characteristics, travel and accommodation choices, participation in activities and attractions, as well as visitors' expenditure on categories such as accommodation, food and beverage, and participation in activities and attractions. The survey was conducted in 2018 between June 11<sup>th</sup> and September 9<sup>th</sup> 2018.

The survey was designed to record information on a range of topics and allow for comparisons of key variables to be made with the Spring and Autumn 2016 visitor surveys that were previously conducted by Tourism Tofino and are not directly comparable to the 2018 visitor intercept survey, while being concise enough to avoid partial completeness. The survey design and methodology was agreed with Tourism Tofino before interviews were conducted.

Visitors were interviewed at both beach and village locations in Tofino. In total, 1,486 visitor interviews were conducted between June and September.

The visitor profile generated by this survey was used to estimate the total visitation to and the total annual expenditure and economic impact of visitors to Tofino.





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