BCOBTA MARKET RESEARCH REPORT 2014

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BCOBTA MARKET RESEARCH REPORT 2014

EXECUTIVE SUMMARY

PURPOSE

The purposes of research were to:

1. provide estimates of the volume of marine tourism traffic and its economic contribution;
2. obtain information about marine tourists for marketing purposes; and
3. obtain information about marinas and harbours for use on AHOY British Columbia, the marine tourism website.

RESEARCH METHOD

Secondary research, mainly from the 2013 *Sail and Cruise Sector Development Strategy*, was consulted and augmented.

An attempt was made to survey every marina and Small Craft Harbour in BC's maritime waters. Over 200 facilities were contacted, of which 50 were eliminated because they do not accept transient pleasure craft. Of the 164 facilities identified as accepting transient vessels, surveys were obtained from 147 at the time of writing. Surveyed facilities represent 90% of facilities that accept transient craft.

Visitor surveys were collected from nine facilities. The 116 surveys collected provide information on visitor origins, trip itinerary, spending and travel motivations.

RESULTS

The results listed below are based on a survey of 90% of facilities and extrapolation to 100%. They are fairly reliable.

- There are approximately 214 marinas and Small Craft Harbours
- 164 facilities accept transient pleasure craft
- Marine tourism activity is fairly evenly distributed across regions. Seventy percent of activity occurs in the Salish Sea (Strait of Georgia), with the remaining 30% recorded on the west coast of Vancouver Island (11%), in the Discovery Islands/Broughton Archipelago (12%) and the North Coast/Haida Gwaii region (7%). (see Table 6)

- The total moorage space for facilities that accept transient vessels is 540,000 feet
- The total moorage space reserved for transient vessels is 128,000. However, about half of facilities report zero dock space reserved for transients, but nonetheless fully accommodate transient vessels.
- The total number of vessel nights recorded annually at marinas and harbours is 180,000
- The total number of vessel nights recorded annually in BC coastal waters, inclusive of marine parks and non-berthed nights, is estimated at 600,000.
- The value of marine tourism spending by boaters is estimated at $105,000,000 annually

BC's maritime marinas sector has the capacity to respond to additional marine tourism traffic. Seventy-six percent of facilities have capacity to respond to additional traffic. Fifty-five percent of facilities reported they would benefit significantly from increased traffic, 43% reported they benefit somewhat and 2% reported they would not benefit from increased traffic.

Across the entire coastal region, facilities report that 55% of marine tourists are from British Columbia, 34% are from the United States, 8% are from Alberta, 1% from the rest of Canada and 2% are from outside Canada and the U.S. Place of origin varies across the coast, with the percentage of boaters from BC decreasing in northern regions and the percentages of American and Albertan boaters increasing in the north.

The survey was aimed at determining the volume of marine tourists that arrive by sea. During the survey we learned that there is a large cohort of boaters who arrive by road with boat in tow. Usually, this group has a homeport from which they sail or cruise widely. When this cohort is added, then the volume of marine tourists from Alberta, rest of Canada and the United States increases. We do not have an accurate measure of this volume, but it is significant enough to effect marketing strategies.

Visitor survey sample size (116 from nine collection points) is small and respondents self-selected. The results are valuable, but they should be seen as indicators and not as diagnostic. Visitor surveys yielded the following results.

- The average length of boating holiday is 27 days.
- Average spending is $185 per day per vessel. There was high variation across the regions from which results were reported, with average spending in the Gulf Islands of $139/day, successively higher levels from more northern locations, and a top spending amount of $279/day reported from the North Coast/Haida Gwaii region.

- The most ubiquitous travel motivator is fishing; enjoyment of natural beauty, observation of marine and terrestrial wildlife, adventure and solitude are strong motivations for boating in BC waters.
- The most common on-shore activities are dining, shopping, hiking, eco-tourism, arts and culture and golf.

Secondary and primary research were used to estimate the size of the marine tourism economy. The estimate is for the amount of money spent by marine tourists piloting their own boat or chartered boat during their vacation. The estimate excludes the piloted boat charter, fishing charter and boat tour sub-sectors. Also excluded are the revenues from marina fees for non-residents who moor or store their craft year round, the value of boat sales, maintenance and repairs and all other revenues not associated with boaters while on vacation.

The estimate of spending by boaters while on holiday is $105,000,000 annually. The empirical basis, assumptions and extrapolations used to derive the total spending estimate are shown in the report. The figure should be viewed as a conservative approximation. It is the best estimate available until BCOBTA can work with the industry to obtain more reliable data.

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BCOBTA
MARKET RESEARCH REPORT 2014

1. MARKET RESEARCH OBJECTIVES

The principal mandate of the BC Ocean Boating Tourism Association is to market British Columbia's marine waters as a boating destination. The objective of that mandate is to increase the marine tourism economy for the benefit of private enterprise, coastal communities and the Provincial Treasury. Market research is required in order to:

1. support a marketing plan; and
2. measure and monitor the size and structure of the marine tourism economy.

Information about the consumer is the foundation of a marketing plan. For marine tourism, it is important to know the place of origin of boaters, their demographics, travel patterns and travel preferences. That information is used to design effective marketing messages aimed at segments of the pleasure boating market and to target geographic markets strategically.

Assessment of the size and structure of the marine tourism economy is needed in order to justify support for the sector and to monitor the impact of the BCOBTA marketing initiative over time.

Secondary sources of market information were researched for the *Power and Cruise Sector Development Strategy* (2013). That report identified the following gaps in marine tourism market research data.

Supply-side Research

- A comprehensive inventory of harbours/marinas along the coast;
- Dock/marina capacity research by month/season;
- Inventory/capacity of local operators,
- Profile of the types of power and sail products and experiences offered in BC;
- Routing/mapping research; and,
- Research about environmental and cultural sensitivities that must be respected.

Demand-side, Competitive and Economic Research

- Consumer needs, preferences and trends research;
- Research about the specific interests of different ethnic groups that are taking an interest in boating;
- Research on the North American and overseas markets for chartering of all kinds including guided natural history/cultural history charters;
- Research on market size and characteristics;
- Pre and post trip awareness about what the destination offers;
- Economic impact research; and,
- Research related to competitive jurisdictions.

The BCOBTA Market Research Report 2014 fills many of the gaps identified in the *Sector Strategy*.

2. RESEARCH AND ANALYSIS METHOD

Given the gaps in existing data, it was decided that primary research was required. However, secondary research in the *Sector Strategy* and in other reports is included as a check on primary data.

Marinas[1] provide the core marine tourism service and their collective business volume is the best measure of the vigour of the marine tourism industry. The number of marinas that accept transient pleasure craft – approximately 164 – is small enough that a 100% survey is possible. However, even if a 100% survey of marinas was obtained, a very large portion of the marine tourism economy is omitted. The fundamental unit for measuring the marine boating economy is the number of vessel nights recorded for all pleasure boats in BC ocean water in a given year. Measuring the total vessel nights in marinas captures only part of a greater total, because vessels do not always berth in marinas. Many anchor at buoys provided by local governments, yacht clubs and the Province. Many anchor overnight in protected waters. Therefore, while annual totals for the number of vessel nights at marinas serves as an indicator of the vigour of the sector, only a fraction of the marine boating economy is measured. It will be necessary to estimate how many additional vessel nights are spent outside of marinas.

The total number of vessel nights is the primary unit of economic measurement. The size of the industry from year to year will be measured by total vessel nights. Consumer spending data is combined with total vessel nights to produce an

[1] Most of the time, marinas will refer to marinas and Small Craft Harbours that accept transient pleasure craft

estimate of total marine tourism spending. It is important that data on vessel nights spent in marinas be accurate, because it is used to calculate an extrapolated total vessel night estimate. However, most marinas do not keep records of vessel nights; some do not even record the number of vessels that docked. Vessel night data for 2014 is mainly based on rough estimates provided by facility operators. BCOBTA will encourage marinas to record vessel night data by providing an information request prior to the start of the marine tourism season, beginning in 2015.

A full account of vessel nights captures most, but not all of the primary marine tourism economy. Two additional sub-sectors contribute to the boating tourism economy, boat charters and boat tours. Charters are when a single party leases a boat and either pilots it (bare boat charter) or the charterer provides a pilot. We define boat tours as multi-partied, multi-day excursions with set itineraries and often including qualified naturalists as guides. The economic contribution of these sectors is not included in this study.

Prior to conducting surveys, BCOBTA recognized that it is an unknown organization and that the marinas it was contacting are its client base. A request for information would be the first contact. It was deemed essential that the first impression given by BCOBTA to its future clients be one of a service provider and that the survey be used as an opportunity to build a relationship. The amount of data collected was limited so as not be onerous. A second reason for limiting the amount of data collected in the 2014 survey was the timing of data collection. Funding was received in June, hence surveying had to take place during the busiest months for the industry.

Two instruments were used to gather primary data: 1) marina survey and 2) visitor survey.

The marina survey was beta tested during face-to-face surveys on the Sunshine Coast. The first 41 surveys were collected in face-to-face interviews at marinas on the Sunshine Coast and Vancouver Island from Port Renfrew to Port McNeill. Most of the other surveys were completed over the phone. Marina managers, using an online template, completed approximately 20 surveys.

Twenty copies of the visitor survey were given to 28 of the marinas where face-to-face surveying was completed and copies were delivered to marinas in Prince Rupert and Powell River. It was recognized that this form of sampling does not control for representativeness and hence is not extremely reliable. BCOBTA will work with marina operators to gather visitor surveys more broadly and consistently. Nine marinas from five regions returned a total of 116 visitor surveys. Despite lack of controls on data collection, the information in these surveys is valuable as a measure of travel characteristics and visitor spending.

Survey results were grouped using the Boater's Blue Pages regions. The division of BC's coastal waters into regions for marketing purposes will not be identical.

3. SECONDARY RESEARCH RESULTS

Available secondary information on marine tourism is included in the 2013 *Sector Development Strategy*. The information is limited and of marginal value for assessing the size of the marine tourism sector or understanding the travel behaviour of marine tourists.

A pair of 2006 Travel Activities and Motivations Surveys from Canada and the United States reveal:[2]

- 58% of Canadian power and sail cruise visitors are male
- 58% of American power and sail cruise visitors are male
- 62% of power and sail cruise visitors from Washington State are male

The Canadian TAMS reveals well-balanced participation by age group. Only 46% of marine tourists are 45 years or older and only 22% are older than 54 years. BC marina operators regularly reported that the aging of the marine tourist is a concern. Many estimated that 75% or more of their visitors were over 55 years of age.

Nanaimo Port Authority conducted a survey of Small Craft Harbours in January 2009[3]. A total of 23 responses to the survey were received, primarily from SCH on Vancouver Island and Sunshine Coast areas. The following results were obtained.

Table1: 2009 Small Craft Harbour Survey Results

Vessels seeking moorage along BC coast (est.)	• 34,400 annually (BC)* • Increased 37% from 2007 to 2009
Average stay (est.)	• 2 days
Average # people/vessel (est.)	• 3 people
Geographic origin (est.)	• 40% US • 60% Canadian

* *Survey results extrapolated to apply to BC as a whole*

[2] Data is for the entire countries and data specific to British Columbia may differ.
[3] Conducted by David Mailloux, Nanaimo Port Authority

The results include an estimate of the number of pleasure craft in BC ocean waters (34,400). The average stay length is time spent in the port where the survey was completed. The average number of people in a party is higher than the BCOBTA survey found for most regions (2.3-2.5). The BCOBTA survey found a similar frequency of U.S. and Canadian boaters, but also recorded international parties.

BC Parks makes estimates of visitor attendance at its Marine Parks. The number of vessel nights over the last six years is shown below.[4]

Table 2: Annual Vessel Nights in BC Marine Parks

07/08	08/09	09/10	10/11	11/12	12/13
33,166	34,141	39,688	39,032	64,829	46,964

There is a spike in estimated attendance in 2011/12, which may be due in part to sampling error and extrapolations from sample data. Otherwise, boating attendance at Marine Parks over the period shows a consistent rate of increase, with a 41.6 increase in volume over the six-year period. There is no way of knowing if the increase in volume to Marine Parks is reflected in overall marine tourism volume. Given how widely dispersed BC's 19 Marine Parks are, rising attendance at Parks suggest a rising volume of boaters. However, it is possible that during the leaner economy since 2008, boaters have stayed more frequently at marine parks where moorage is free, rather than berthing at commercial marinas.

Surveys of marinas will provide an estimate of the vessel nights spent in berths. The vessel nights spent at Marine Parks are additional. BC Parks counts are the only source of information on vessel nights outside of berths. An estimate of total vessel nights outside of berths will have to be made (see below, 4.4).

Custom entries provide an accurate estimate of the number of U.S. based private vessels entering BC waters. Almost all of these are pleasure craft; commercial vessels are recorded separately. Canada Customs reports the number of persons entering Canada by private boat, not the number of boats. The figures in Table 3.2 are the number of persons recorded, divided by 2.3, our estimate of the average number of people in a boating party based on visitor surveys.

[4] BC Parks reports vessel nights times an estimate of 3.2 person/boat; figures used here are vessel nights.

Table 3: Number of U.S. Vessels Entering BC Waters for One Night or More

Year	2009	2010	2011	2012	2013
Number of Boats	13,626	12,837	11,423	10,926	10,124

The number of vessels entering BC waters from the U.S. decreased by 30% between 2009 and 2013. The numbers are consistent with reports from many marina operators that U.S. visitor numbers have declined. These data provide a means to calculate the total number of pleasure craft. Our surveys tell us that roughly 34% of visitors to marinas are Americans. With roughly 10,000 U.S. boats, the total number of boats would be 30,000. The Nanaimo Port Authority estimate in 2009 was 34,500. We can be fairly confident that 30,000 is a conservative estimate of the number of pleasure craft in BC waters annually.

Ladysmith Harbour Society published data on marine tourism visits and spending. In 2013, the marina recorded 1380 vessel nights with an estimated 3500 visitors in the parties, for an average party size of 2.5 persons. Total direct spending was estimated at $440,000, or $319 per vessel night. BCOBTA primary research yielded per vessel spending between $132 and $279, depending on the region the data was collected in (see below, 4.5).

4. PRIMARY SEARCH RESULTS

An effort was made to contact every marina and Small Craft Harbour (SCH). Out of an estimated 214 facilities, contact was made with 199. Those not contacted did not respond to multiple attempts and some of these may not longer operate.

Only facilities that accept transient pleasure craft were surveyed. It is estimated that there are 164 marinas and SCH that accept transient pleasure craft. Of these, 147 were surveyed at the time of writing. Those that were not surveyed were contacted repeatedly, but failed to provide data over the phone or in survey forms sent to them electronically. Only three facilities declared they were unwilling to provide information.

4.1 CAPACITY AND TRAFFIC

Table 4 shows the number of marinas in BC Coastal waters. Out of a total of 214 harbours and marinas, 164 (76%) take transient craft. Those that do not are usually in urban areas, where there are large permanent moorage markets.

Table 4: Number of Marinas and Harbours in BC Coastal Waters

Region	Facilities that take Transient Vessels	Facilities that do not take Transient Vessels
Desolation Sound*	22	5
Gulf Islands	16	3
Lower Mainland	15	18
North Coast/Haida Gwaii	17	1
North of Desolation Sound**	18	2
Sunshine Coast	21	5
Southeast Vancouver Island***	21	9
Victoria/Sidney/Saanich	14	4
West Vancouver Island	20	3
ALL	**164**	**50**

* Campbell River, southern Discovery Islands, Desolation Sound
** northern Discovery Islands, Broughton Archipelago, Johnstone Strait
*** Cowichan to Courtenay

The distribution across BC's coastal waters of marinas that accept transient pleasure craft is fairly even. There are greater concentrations of marinas in the Salish Sea region compared to other regions. However, the marine tourism industry is well represented in northern regions and the west side of Vancouver Island.

Table 5 shows the total moorage space and amount of moorage space reserved for transient vessels for marinas surveyed in each region. It is helpful to observe how much space is reserved for transient pleasure craft, because the amount of space indicates the business orientation to transient (vs. permanent) moorage. However, many facilities recorded zero space "reserved" for transient moorage, but had high transient boat counts. Moorage space often is not reserved, but is usually available.

There are 491,418 feet of total moorage space at the 147 marinas surveyed. They represent 90% of facilities that accept transient craft. The extrapolated figures at the bottom of the columns add 10% to the surveyed total and round the total to the nearest 1000.

Table 5: Total and Transient Moorage Space

Region	Total Moorage (ft)	Region %	Transient Moorage (ft)	Region %	Trans/Total (%)
Desolation Sound	43,628	9%	12,860	11%	29%
Gulf Islands	27,844	6%	18,284	16%	66%
Lower Mainland	94,121	19%	4,485	4%	5%
North Coast/Haida Gwaii	28,480	6%	13,582	12%	48%
North of Desolation Sound	30,105	6%	18,585	16%	62%
Southeast Vancouver Island	92,455	19%	15,085	13%	16%
Sunshine Coast	41,282	8%	9,935	9%	24%
Victoria/Sidney/Saanich	91,539	19%	12,093	10%	13%
West Vancouver Island	41,964	9%	11,050	10%	26%
Total	**491,418**	**100%**	**115,959**	**100%**	**24%**
Extrapolated	**540,000**		**128,000**		**24%**

An important finding of the survey is that many marinas and virtually all SCH do not devote space for transient pleasure craft, yet find berths for most vessels that arrive. The figures under Transient Moorage are for the space that is reserved. The actual space used for transient moorage during the tourist season is probably double the amounts shown in that column. Table 6 needs to be consulted in order to assess the capacity and volume of marine tourism Provincially and across regions.

The greatest amount of total space is found in the urban regions (Lower Mainland and Victoria/Sidney/ Saanich and the Southeast Vancouver Island region. Table 5 may be used to assess the relative importance of marine tourism to the marina sector across regions. We see that the predominantly urban regions (Lower Mainland, Victoria/Sidney/Sannich, Southeast Vancouver Island) have the lowest percent of dedicated permanent moorage space, while remoter regions and the Gulf Islands have the highest amount of devoted transient space, indicating a higher dependence on marine tourism for revenue generation.

It is worth noting that the Lower Mainland and Victoria/Sidney/Saanich regions have very high numbers of marinas that do not take transient vessels and, hence, are not included in moorage volume figures. Approximately half of facilities in the two regions, with more than half of moorage space, do not accept transient pleasure craft.

Table 6 lists the number of overnight vessel stays in each region. Vessel nights are the primary tracking unit for evaluating the size of the marine tourism industry and for calculating its economic value. Combining data in Tables 5 and 6 gives a clearer indication of the economic value of marine tourism across regions and of the capacity of marinas to accommodate transient vessels.

Table 6: Total Vessels Nights and Vessels Turned Away

Region	Total Vessel Nights	Percentage of total	Number of Vessels Turned Away	Percentage of total
Desolation Sound	22,351	14%	849	13%
Gulf Islands	28,052	17%	1,225	19%
Lower Mainland	7,379	5%	265	4%
North Coast/Haida Gwaii	11,100	7%	240	4%
North of Desolation Sound	19,150	12%	960	15%
Southeast Vancouver Island	29,479	18%	940	14%
Sunshine Coast	16,197	10%	967	15%
Victoria/Sidney/Saanich	12,480	8%	295	4%
West Vancouver Island	17,398	11%	830	13%
Total	**163,586**	**100%**	**6,571**	**100%**
Extrapolated	**180,000**		**7000**	

The extrapolated figures at the bottom of the columns add 10% to the surveyed total and round the total to the nearest 1000.

Total Vessel Nights is a better indicator of the importance of marine tourism than the amount of space reserved for transient craft (Table 5). There are a total of 180,000 vessel nights recorded annually by BC maritime marinas and SCH. Greatest volume is recorded in the Southeast Vancouver Island and Gulf Islands regions. Lowest volume is recorded in the Lower Mainland region.

The distribution of marine tourism activity is fairly even across BC coastal waters. Approximately 70% of vessel nights are recorded in the regions comprising the Salish Sea. Approximately 30% of vessel nights are recorded in the remoter North of Desolation Sound, North Coast/Haida Gwaii and West Vancouver Island regions.

Table 6 can be used to compare the value of marine tourism across regions. For example, total moorage space in the Lower Mainland represents 19% of surveyed coastal moorage space, yet that yet region records only 5% of transient vessel stays. This discrepancy indicates that marine tourism is a small segment of marina business in the Lower Mainland. Marinas in the North of Desolation Sound region have 6% of Provincial moorage space and 12% of the volume of traffic. The Gulf Islands have 6% of marina space and 17% of marine tourism traffic. These figures show that marine tourism is an important source of revenue for marinas in these regions and for the regional economy.

The estimate of number of boats turned away was meant as an indicator of demand. By itself, it is not an accurate indicator. Much of the volume in Table 6 is due to large vessels turned away because the facility cannot handle them. Most facilities will try to find a way to accommodate vessels, even when their moorage space is full; for example, by rafting vessels. Table 7 gives a better indication of the relationship between marina berth supply and transient tourist demand.

Marina operators were asked if they have the capacity to take in additional transient craft and if the facility would benefit from increased traffic in the main (July-August) and extended seasons.

A “yes” answer to having additional capacity could mean many things: there is room within the water lease to expand, occupancy rates were not 100% even in the peak season, boats could be rafted, permanent berths could be used temporarily for transients. The next two columns give a finer indication of the desire for more transient traffic. About 75% of marinas would benefit from additional traffic in the main season and nearly 90% would benefit in the extended season.

Table 7: Ability to Respond to Additional Traffic

Region	Has capacity for additional transient traffic		Would benefit from additional capacity in Main Season		Would benefit from additional capacity in the Extended Season	
	Yes	No	Yes	No	Yes	No
Desolation Sound	17	5	14	8	21	1
Gulf Islands	14	1	14	1	13	2
Lower Mainland	3	12	8	7	12	3
North Coast/Haida Gwaii	13	2	13	2	15	0
North of Desolation Sound	13	3	14	2	16	0
Sunshine Coast	16	3	18	1	18	1
Southeast Vancouver Island	15	4	15	4	15	4
Victoria/Sidney/Saanich	6	2	6	2	6	2
West Vancouver Island	12	3	10	5	13	2
Total	**109**	**35**	**112**	**32**	**129**	**15**

Highlight: Rubber Tire Boaters During the course of surveying, it was learned that marinas in some regions receive a considerable amount of boat traffic via boats brought on trailers. The owners of these boats represent a distinct market segment. They are predominately from Alberta, followed by BC and the U.S. northwest.

In order to be consistent, we did not include estimates of the berths occupied by “rubber tire” boats in vessel night estimates after we learned of them. However, an estimate of the percentage of business in this category was gathered from facilities that reported significant rubber tire boaters.

The highest volumes of rubber tire boaters are found from Comox north around the top of the Island, in all road-accessed communities on West Vancouver Island, the ferry-accessed Discovery Islands east of Campbell River and on the North Coast. In those regions, 20-30% of berths contain vessels that arrived on a trailer. Approximately 60% of this group dwell in Alberta.

If these vessel nights are added, then the vessel night totals for West Vancouver Island, Desolation Sound and North Coast/Haida Gwaii, increase significantly. The rubber tire cohort is extremely important to the marine tourism economies of those regions, but unfortunately, it was not measured in this research project. BCOBTA will include the rubber tire boating sector in future surveys. Enough information was gathered about this cohort to adequately inform a marketing strategy. The cohort is large enough to be worth advertising to. These boaters stay for long periods. Their boat and their motorhome are the equivalent of a summer cottage. They reside at locations with RV parks attached to, or near, a marina. A few use fixed roof accommodation. They take frequent extended trips from their homeport.

4.2 BENEFITS OF MARKETING INITIATIVE

Operators were asked if their facility would benefit from increased marine tourism traffic.

Table 8: Facility will benefit from increased marine tourism traffic

Region	Facility will benefit from increased traffic		
	Not at all	Somewhat	Significantly
Desolation Sound	0	10	12
Gulf Islands	0	7	8
Lower Mainland	2	10	3
North Coast/Haida Gwaii	0	7	8
North of Desolation Sound	0	5	11
Sunshine Coast	0	8	12
Southeast Vancouver Island	1	8	10
Victoria/Sidney/Saanich	0	5	7
West Vancouver Island	0	6	9
Total	**3**	**66**	**80**

The results show that almost all marinas and harbours would benefit from additional tourism traffic, with more than half benefitting significantly. There do not appear to be significant differences in responses across regions, except for the Lower Mainland where anticipated benefits are lower. These data, when combined with the capacity data in Table 7, indicate that some marinas that do not have additional capacity, would nonetheless benefit from additional traffic. The reasons operators gave for this apparent contradiction are that 1) excess traffic moors at anchor or at buoys nearby and purchases services and 2) additional traffic strengthens the marine tourism economy. Some operators identified a benefit to the larger business community.

In order to appraise the level of support for the BCOBTA initiative, operators were asked if a collaborative destination marketing initiative would increase revenue to their facility from transient vessels.

Table 9: Collaborative marketing will increase revenues

Region	Marketing will increase revenue		
	Not at all	Somewhat	Significantly
Desolation Sound	0	12	10
Gulf Islands	0	10	5
Lower Mainland	2	10	3
North Coast/Haida Gwaii	0	7	10
North of Desolation Sound	0	9	7
Sunshine Coast	0	8	12
Southeast Vancouver Island	1	8	9
Victoria/Sidney/Saanich	0	4	8
West Vancouver Island	0	9	6
Total	**3**	**75**	**70**

The question is designed to evaluate support for a collaborative marketing initiative. Almost all operators responded positively, with about 50% anticipating a modest benefit and 45% anticipating a significant benefit. There responses may be an indicator of willingness to advertise on the AHOY BC website and take part in promotional activities.

4.3 VISITOR ORIGINS

The place of origin of marine visitors is shown in Table 10. The estimates are from marina managers and are rarely supported by records. There was consistency in reported percentages as we surveyed within regions, which gives grounds for confidence in the estimates. These estimates may be compared to results from 116 visitor surveys; those estimates are shown in **bold**.

Roughly 55% of boaters are BC residents[5], with a range across regions of 62% (Gulf Islands) to 35% (North of Desolation Sound). The proportion of BC boaters is slightly higher in the south than the north. Voyage itineraries from visitor surveys indicate a popular cruise for BC boaters includes the Gulf Islands, mid-east Vancouver Island, Sunshine Coast and frequently Desolation Sound.

Table 10: Origins of Marine Visitors

Region	BC	Alberta	Canada Rest	US West	US Rest	World Rest
Desolation Sound	52%	12%	0%	32%	1%	1%
Gulf Islands	62% **60%**	6%	2%	21% **40%**	6%	2%
Lower Mainland	61%	0%	3%	33%	0%	2%
North Coast/Haida Gwaii	45% **33%**	10% **17%**	1%	36% **44%**	3%	3% **6%**
North of Desolation Sound	35%	4%	0%	54%	2%	2%
Sunshine Coast	59% **45%**	4%	1%	31% **55%**	1%	1% **5%**
Southeast Vancouver Island	50% **42%**	8% **5%**	0%	37% **53%**	2%	0%
Victoria/Sidney/Saanich	45% **41%**	9%	0%	41% **59%**	2%	1%
West Vancouver Island	58%	12%	1%	28%	1%	0%

Roughly 34% of boaters are from the United States, with a range across regions of 56% (North of Desolation Sound) to 27% (Gulf Islands). Americans are comparatively most numerous north of the Salish Sea, indicating they are taking longer vacations. The lower percentage of Americans in the North Coast Haida Gwaii region (39%) indicates that for many Americans the Discovery Islands and Broughton Archipelago are the destination, with 2/3 continuing to the North Coast and Alaska. Within the North Coast/Haida Gwaii region, Haida Gwaii had many fewer U.S. visitors than the rest of the region. The comparatively low representation by American boaters in the West Vancouver region, where fishing is the primary motive of Canadian visitors, suggest the former have not

[5] Estimates for Provincial percentages are based on a rough weighting of regional figures by number of vessel nights.

discovered the west island as a fishing ground. American fishers are numerous in the Desolation Sound and North of Desolation Sound regions.

Roughly 8% of boaters are from Alberta. They are most numerous in the Desolation Sound (12%), West Vancouver Island (11%) and North Coast/Haida Gwaii regions. Facility operators reported that many Albertans permanently berth boats in Comox and the south Island from Sidney to Sooke, because there are direct flights from Alberta. The high percentage in the North Coast/Haida Gwaii region is due to Albertans who bring boats on trailers to Prince Rupert and tour the region. Albertans are predominant fishers and the three regions they visit most are renowned for fishing.

Canadians from outside of British Columbia and Alberta make up less than 1% of boaters. Two percent of boaters are from outside of Canada and the United States.

4.4 TOTAL VESSEL NIGHTS CALCULATION

An estimate of the total number of marine tourist vessel nights is required in order to estimate the size of the marine tourism economy. The marina survey results capture only a portion of total vessel nights, because not all vessels spend every night in a marina. For example, in 2012/13, 46,964 vessels nights were recorded in Marine Parks. During the survey of marinas on the Sunshine Coast and Vancouver Island in July and August of 2014, scores of boats were seen moored at anchor everywhere there is protected waters. We were told by marinas on North Vancouver Island and the neighbouring islands that vessels come in for a night and then go to sea for a week before returning.

Surveyed harbours report a total of 163,586 vessel nights. Approximately 90% of marinas that accept transient pleasure craft were surveyed. The addition of 10% to the vessel night total, in order to account for missing facilities, yields a estimated total of 180,000 vessel nights spent in marinas and SCH.

Our surveys did not record the vessel nights of visitors who arrived at the marina by land. This cohort represents 20-30% of vessel nights in a few regions. We add 20,000 to the survey total to reach 200,000 vessel nights spent in marinas and SCH annually.

We do not have a reliable way to estimate the number of vessel nights spent outside of marinas and harbours. However, we do have estimates of the number of pleasure craft in BC ocean waters (conservatively 30,000) and of the average trip duration (27 days: see 4.5 below). In order to be conservative, and because of the possibility that a disproportionate number of long trippers completed Visitor Surveys, we will use an average trip duration of 20 days in the calculation of total vessel nights. Thirty thousand boats times 20 nights yields 600,000 vessel nights, of which approximately 1/3 are spent moored in a marina or harbour.

4.5 VISITOR STAY DURATION, PARTY SIZE AND SPENDING

Visitor stay duration, party size and spending information were obtained from 116 surveys collected at 9 marinas in five regions.

According to visitor surveys, the average duration of trips ranges from 13 days in the Gulf Islands to 39 days on the North Coast. Average trip length across all regions is 27 days. Trip length is for the entire vacation, not for the region in which it was recorded.

Table 11: Trip Characteristics

Region	Ave. Trip Length	Ave. Party Size	Ave. Spending/boat/day
Gulf Islands	13	2.1	$132
South Sunshine Coast	29	2.2	$153
SE Vancouver Island	27	2.2	$171
North Sunshine Coast	32	2.4	$191
North Coast	39	3.5	$279

The average length of trips is skewed by about 20% of parties reporting trip lengths over 40 days and up to 120 days. The effect of long trips on the averages is indicated by a median trip length of 19 days, well below the 27-day average. Approximately 70% of trips are less than 28 days and about 25% are less than 14 days. The results contradict a presumption that most marine vacations are less than a week to a few weeks long. It is possible that people on short trips are less likely to complete a visitor survey than people who have spent a month or months on the water.

Eighty-three percent of parties across all sampled regions consist of two persons. There are more parties between 3-6 persons in remoter regions.

Expenditures are not region specific, because boaters visit multiple regions. The regional data tell us that people on longer voyages and more remote voyages spend more per vessel-day. Examination of individual records shows lower than average spending on short trips to southern regions (Gulf Islands, Sunshine Coast). The explanation for higher spending on longer trips could be that short trippers fully provision before leaving, long trippers refit regularly, fuel is the highest trip expense and party size is higher on long trips.

Table 11 has been constructed with southern regions on top and northern regions on the bottom. That arrangement reveals patterns in all three travel characteristics. Trip length, party size and daily expenditures increase from south to north. Common trends among the three variables suggest correlations between the three trip characteristics. Visitors who travel on smaller boats take shorter trips in smaller parties and spend less money. Visitors in larger boats take longer trips in larger parties and spend more money.

4.6 VALUE OF MARINE TOURISM CALCULATION

In section 4.4, we estimated the annual total vessel nights spent in BC waters by marine tourists to be 600,000. We now combine that estimate with an estimate of spending to calculate the dollars spent by pleasure boaters.

Average per party spending per night for all regions is $185. In order to be conservative, allowing that it appears a disproportionate number of long trippers completed the survey, we will use $175/day as the average vessel spending. Using our estimate of total yearly vessel nights (600,000) yields a total spending by marine tourists of $105,000,000 annually. This figure should not be used as a fact. It is a rough estimate. It is based on a reliable estimate of vessel nights in marinas and a fairly reliable estimate of daily spending. Unreliability lies in the estimate of vessel nights spent outside of marinas and Small Craft Harbours, which is double the number of nights recorded by facilities.

The spending estimate does not include portions of the marine tourism sector such as boat charters, boat tours, permanent moorage fees paid by marine tourists, maintenance and repairs, boat sales and transportation costs.

4.7 TRAVELLER AND TRIP TRENDS

Marina operators were asked to comment on industry trends.

Age of Boaters: The most consistent comment was the age of boaters is increasing. The majority of parties are over 55 years of age and parties over 65 years are common. Operators commented that younger boaters are not replacing aging boaters. This report was most frequent and emphatic in the more remote regions of Desolation Sound, North of Desolation Sound, and North Coast/Haida Gwaii regions. The trend was linked to the increasing cost of boating, the relative wealth of the baby boomer generation and to a trend to larger boats, which cost more. Boaters whose primary motivation is remote fishing tend to be elderly; again this is related to the cost of this type of excursion and to the large boats this group operate.   The age of boaters in the West Vancouver Island region is reported as lower, with parties of younger males from Alberta motivated primarily by fishing.

There were contrary reports. A few marinas in southern regions report an increase in younger boaters and families, as opposed to couples. These marinas offer an affordable destination experience that appeals to families with children. Specifically, they offer cabin rentals or camping, along with recreational activities that allow families to get off the boat at affordable rates.

A 2012 study of the Canadian boating economy by the National Marine Manufacturers Association reports aging population as the biggest concern of industry members. Growth in boat sales and marine tourism has been driven by baby boomers with the finances and time to cruise or sail. The fact that over 80% of boating parties are duos underscores that family boating is not common; it is something couples do after the children leave home. The question for the marine tourism sector is whether or not the next generation will buy boats and replace baby boomers on the seas.

Size of Boats: Marina operators report that vessels are getting larger. Many report the need to reconfigure berths from the once common 25-35 feet to lengths of 40-60 feet. Many operators related increasing boat size to the increasing age, comfort requirements and affluence of boaters. They report long term, repeat visitors as arriving in successively larger boats over decades. Some operators link larger boats to a trend in longer trips.

Longer Trip Length: Many operators report that the frequency of long trips is increasing. This trend is not as pronounced as the age and boat size trends. Our visitor surveys reveal that about 20% of reported trips are longer than 40 days. It is likely that long trips are made in the larger boats owned by affluent retirees.

The length of trip for parties that bring their boats on trailers needs to be viewed separately from parties that arrive by sea. Rubber tire boaters frequently spend 1-4 months at a single location and make regular trips to sea. This form of summer vacation is reported to be increasing in popularity, with some marinas reporting 30% of their berths occupied by boaters who drove to the marina.

Origins of Boaters: There do not appear to be clear trends in the place of origin of boaters. Several marinas in southern regions report a decline in U.S. visitors since 2008, but some report an increase. Marinas in northern regions generally report an increase in the percentage of U.S. visitors. The percentage of BC boaters appears to be steady or increasing in the south and slightly declining in the north. The volume of visitors from the rest of Canada, especially from Alberta, is widely reported as increasing. International traffic is so sparse that trends are not observable.

A few marinas in the Victoria, Sidney, Saanich region report their first boating visitors from China. They were on chartered vessels or accompanying Canadian residents. One operation that combines a hotel with a marina (including concierge service to boaters) is working with Chinese tour operators. More and more Chinese visitors are participating in nature-based recreation. The potential of the Chinese market, domestic and overseas, should be assessed. Destination BC includes China among its target emerging markets.

Volume and Seasonality of Visitors: Fifty-four percent of marina operators report that visitor volume is increasing. Forty percent report it is steady or did not comment. Only 16% report visitor volume is decreasing. There appear to be some patterns in visitor volume trends. Destination marinas[6] are the most likely to report increased volume. Marinas in northern regions that cater to fishers (most do) almost unanimously report increased visitor numbers. Many that report steady numbers do not have capacity for more visitors. Declining numbers were reported mainly at Small Craft Harbours that offer few amenities.

Most marinas report being full during July and August. Many report brisk business from May through September. Extended seasons are most often reported by marinas in Desolation Sound, North of Desolation Sound and West Vancouver Island that cater to fishers. Visitors come in May to catch Spring runs of salmon and in September and October to catch Fall runs. Destination marinas that offer on-shore comforts frequently report brisk extended seasons. Marinas that offer only moorage tend to have the shortest seasons.

4.8 VISITOR TRAVEL MOTIVATORS

Travel motivations were identified in marina surveys by marina operators and by visitors in visitor surveys. Travel motivations are described for each geographical region, despite their being common motivators across regions and most boaters visit more than one region. The emphasis on motivators changes from region to region and patterns emerge in the motivations of boaters as we move from south to north, or from the protected waters of the Salish Sea to the more challenging waters north of Desolation Sound and on the west side of Vancouver Island. Hence, we start from the south and work northward.

Gulf Islands

Located close to population centres, safe waters, cultural and hospitality amenities abound, many harbours and anchorages.

	BC	AB	RofC	US West	Rest US	Rest of W
Gulf Islands	62% **60%**	5%	2%	21% **40%**	6%	1%

[6] There are a few types of destination marinas. The most common type offers hospitality and recreational services to boaters. A second type is located in urban areas where services and things to do abound. Fishing resorts are a third type.

- many repeat visits
- shorter trips a regional feature: taps the short haul market from the Lower Mainland, Vancouver Island and Washington: single overnight stays with boats anchoring in several places in a short period: a high volume on anchor
- Gulf Islands-Sunshine Coast-Desolation Sound is a common trip
- longer stays: many boats are in the Islands for several weeks, but only dock to refit, for recreation, to dine
- the Gulf Islands is the most visited region; its position puts in on the route to other destinations
- some RV/boating on Salt Spring and Gabriola
- land-based activities are high motivators: arts and culture, agricultural and wine tours, eco-tourism, Salt Spring Island Farmer's Market, golf, hiking/kayaking
- fishing common, but less a primary motivator than in other regions
- higher percentage of small boats than most regions
- higher percentage of sail vs. power boats than most regions
- probably a somewhat younger age group than in many other regions

Victoria, Sidney, Saanich

A highly populated region. Very large numbers of boat owners, hence many marinas offer only permanent moorage. High quality and diverse amenities, many catering to boaters. Fairly safe waters.

	BC	AB	RofC	US West	Rest US	Rest of W
Victoria/Sidney /Saanich	45% **41%**	9%	0%	41% **59%**	2%	1%

- very diverse market: within range of smaller boats, also attracts the largest boats
- caters to a mainly urban onshore experience
- mainly short stays by boats touring the region or on their way to other destinations
- land activities, dining, shopping, arts and culture
- attracts the high amenity boater
- fishing not often a primary motivator
- trip likely to include Gulf Islands, Sunshine Coast, Southeast Vancouver Island

Southeast Vancouver Island

From Cowichan to Courtenay. A diverse region with a few semi-remote ports: urban destinations at Cowichan Bay, Duncan, Nanaimo, Comox.

	BC	AB	RofC	US West	Rest US	Rest of W
Southeast Vancouver Island	50% **42%**	8% **5%**	0%	37% **53%**	2%	0%

- mainly a travel corridor to other regions, except for a few destination ports; many US boats heading north, often Alaska
- a diverse market, but tending to larger boats than VSS
- land activities: shopping, dining, hiking, golf, arts and culture
- attracts high amenity boaters
- fishing a moderate motivator; facilities between Nanaimo and Courtenay host long term fishers, many are RV boaters

Lower Mainland/Howe Sound

An urban area. Very little space (5%) for transient vessels. High number of boat owners, so water is busy, marinas cater to permanent rentals. The Lower Mainland is a primary source for marine tourists, not so much a destination.

	BC	AB	RofC	US West	Rest US	Rest of W
Lower Mainland	61%	0%	3%	32%	0%	2%

- This will be part of a southern, urban region that includes Victoria, Sidney Saanich.

Sunshine Coast

Located close to population centres, safe waters, cultural and hospitality amenities abound, many harbours and anchorages. Many small ports, most with land-based activities and amenities nearby.

	BC	AB	RofC	US West	Rest US	Rest of W
Sunshine Coast	59% **45%**	4%	0%	31% **55%**	1%	1% **5%**

- mainly mid-sized and smaller craft: within range of small boats: also a corridor for boats heading north; many US boats heading north, some to Alaska
- Pender Harbour area and Prince Louisa Inlet a top draw; Desolation Sound often the destination
- 80% of boats with Desolation Sound as destination visit SC; 70% heading to North Coast/Haida Gwaii visit SC
- stays usually short, except in a few destination ports (Pender Harbour, Secret Cove, Powell River)

- Some RV/boating at Pender Harbour, Egmont
- Shore activities: hiking, mountain biking, golf, arts and culture, dining, shopping, camping, cabin rentals, eco-tourism
- fishing a motivator for many who travel past Sechelt

Desolation Sound

North of Courtenay to Campbell River, adjacent islands, north of Lund. This is the northern-most extent of relatively unchallenging waters. Ports on Vancouver Island and nearby islands are jumping off and refit locations for boaters heading north. Cultural and hospitality amenities reduced, compared to the south.

	BC	AB	RofC	US West	Rest US	Rest of W
Desolation Sound	52%	12%	0%	32%	1%	1%

- boaters are older than in the south, a trend that continues to the north: likely related to larger, more costly boats
- proportionally more motor than sail vessels, and vessels larger, than to the south.
- large US cohort: larger boats, many headed to Alaska
- lots of RV/boating, mainly Albertans; Campbell River a home port for many Albertans
- on-shore activities: hiking, ecotourism, animal viewing
- fishing a very strong motivator: many boats come to fish for a week to several weeks, refitting as needed. Boaters listen to fishing reports and travel up in good years
- marine mammal tours, kayaking, snorkelling in rivers
- many destination ports that offer camping, resort features

North of Desolation Sound

Includes the many islands and inlets between the Salish Sea and the open waters of the north coast and Haida Gwaii. Navigational challenges greatly increase. The weather is cooler and wetter and water temperature drops considerably. The few ports offer destination and comfort amenities.

	BC	AB	RofC	US West	Rest US	Rest of W
North of Desolation Sound	35%	4%	0%	54%	2%	2%

- trends described for Desolation Sound continue
- region has the highest percentage of U.S. boaters according to marina surveys
- the region is a destination for many parties; the scattered marinas cater to destination mooring
- also the main route to the north coast and Haida Gwaii
- boaters refit to stay at sea for a week, then return to Port McNeill, Campbell River and ports in the nearby islands.
- fishing is the dominant motivator: boaters seek the superior fishing and isolation
- marine and land wildlife viewing, opportunity to eat fresh seafood, strong motivators

North Coast/Haida Gwaii

This is a long haul experience. Atop the navigational challenges of the Inside Passage, sailors are now in wide, open seas with few ports for refuge.

	BC	AB	RofC	US West	Rest US	Rest of W
North Coast /Haida Gwaii	45% **33%**	9% **17%**	1%	36% **44%**	3%	3% **6%**

- trends described above continue
- boater surveys indicate high U.S. cohort, consistent with high volume in North of Desolation region, which lies on the route to the north coast
- trips to this region are long; most parties visit many regions, except West Vancouver Island; a circle route is likely
- fishing, wildlife viewing, fresh fish, isolation, ecotourism are strong motivators
- First Nations culture, history and culture are motivators

West Vancouver Island

From Sooke to the northern tip of the Island. Travel is in exposed seas with few ports or natural safe harbours. Tofino/Ucluelet, Port Alberni, and Gold River offer refuge, refiting and amenities. The north end of this region has destination marinas with shore and water amenities

	BC	AB	RofC	US West	Rest US	Rest of W
West Vancouver Island	58%	12%	1%	28%	1%	0%

- there are three distinct market segments:

  - 1) travels to Tofino/Ucluelet: typical of the Salish Sea boater
  - 2) to north Island: mainly motivated by quality of fishing, wildlife, destination marinas
  - 3) circumnavigates the Island: mainly BC boaters
- low percentage of U.S. boaters is notable: BC and Alberta boaters go for the superior fishing
- large RV/boater cohort, especially at Port Renfrew and north end (Zeballos, Winter Harbour)

5. Synopsis of Marketing Messages

Regional Destination Markets

The marine and human geography of BC's coast attract different types of boaters, or you might say boaters seeking different experiences.

Seventy percent of overnight stays are in the Salish Sea meta-region, which extends to Campbell River and Desolation Sound. Ocean travel in the Salish Sea region is relatively unchallenging. Ports are frequent; comfort amenities are available almost everywhere. The Gulf Islands and Sunshine Coast/Desolation Sound offer confined sailing experiences where landscapes add to aesthetic diversity. Fishing as a motivator increases in the north of the Salish Sea. The majority of boaters travel widely within this region, which suggests it should be marketed as a region made up of sub-regions. A circle cruise itinerary of all of the sub-regions should be considered.

Thirty percent of overnight stays occur in the North of Desolation Sound, North Coast, Haida Gwaii and West Vancouver Island regions.[7] The boater and the boat change in these regions. Navigation is more challenging, so boats are larger and sailors more experienced. There are fewer ports and reduced access to comfort amenities. The weather and water are cooler. Boaters are attracted by excellent fishing, isolation, rustic and high comfort resorts and the spirit of adventure.

The West Coast of Vancouver Island offers open sea navigational challenges and safe harbours and comfort amenities are more scattered than in the Salish Sea region. It appeals to a similar boater as North of Desolation Sound and North Coast/Haida Gwaii. Motivations are similar: excellent fishing, rustic comfort, abundant sea and land wildlife, isolation.

Based on the type of sailing experience and the type of boater attracted to that experience, we should consider dividing BC's Coast into four meta-regions:

[7] Included in this is about 1/4 of the stays in the Desolation Sound region.

Salish Sea, Inside Passage/Broughton Archipelago, North Coast Haida Gwaii and West Vancouver Island.

Fishing

Fishing is a powerful motivator for the majority of boaters. In some regions, half or more of boaters are there primarily to fish. Marketing to fishers in western Canada and the U.S. will have one of the highest rates of return. We were told often enough to consider it reliable that sports fishing is migrating up the BC coast. People who used to fish near Tofino now anchor in Winter Harbour. Likewise, there is movement by fishers from the Gulf Islands and Southeast Vancouver Island regions to Desolation Sound and north.

Rubber-tired Market

This cohort was not identified when the survey was designed. These are residents of inland BC, Alberta and the northwest U.S. (and some from elsewhere in the U.S.) who bring their boat to a marina on a trailer. Fishing is the primary motivator. The bulk of this traffic is in remoter locations as indicated in the motivations section. Attracting more of this kind of traffic is a key opportunity.

On shore activities

Marina operators report visitors frequently hiking, mountain biking, golfing, visiting cultural centres, ecotourism, markets, wineries, etc. Visitor surveys supported reports by operators. The most frequent shore activities are dining, shopping, arts and culture, hiking and specific events. Many boaters listed kayaking as an activity. None of the 116 visitor parties surveyed participated in golf or mountain biking. Many marinas cater to boaters who want to get off their boat for a few days. These boaters are the most likely to participate in activities other than dining and shopping. The information from both sources suggest that in order to encourage boaters to spend more time on shore, the host marina should provide destination style amenities and recreation services, either itself or in cooperation with tour companies.