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1. Introduction

The Need for the Study

Vancouver, Coast and Mountains Tourism Region recognizes the value of research to marketing decision-making. For the years 1997 and 1998 VCM researched the influence of its largest member publication: the *Vancouver, Coast and Mountains Travel and Adventure Guide*.

The golf market is seen as an important and growing component of Vancouver, Coast and Mountains (VCM) tourism. Since 1998, VCM has been producing a golf specific travel guide entitled *Guide to Spectacular Golf*. Seventeen (17) golf courses located throughout the region (all members of VCM) participated in this marketing program during 2000. The overall objective of VCM golf marketing is to bring overnight visitors who reside *outside* the boundaries of its four sub-regions: Greater Vancouver; "Sea to Sky Country" which includes Whistler; the Fraser Valley to Hope; and, the Sunshine Coast, to the region for an overnight stay. These potential visitors are termed Non-Residents. VCM does not target its marketing activities to people residing within the tourism region (Residents).

During the spring of 2000, VCM determined that more information regarding the profile, activities and patterns of Non-Resident (NR) golfers would be beneficial to the marketing planning process. Therefore it was determined that an on-site (golf course) survey of NR golfers golfing in the region during the spring and summer should be conducted.

TREC International Inc. was contracted by VCM to conduct a survey of NR golfers during the period from June through the end of August 2000. The primary purpose of the survey was to develop an overall profile of golfers visiting VCM from outside the tourism region, i.e. "Non-Resident golfers".

Nine golf courses from VCM Tourism Region participated in the survey. The overall findings are presented in the Main Report, which includes the following sections:

- Methodology
- Survey Highlights
- Appendices for Questionnaire and Data Tables

Four additional separate reports have also been prepared - one for each individual course that generated a survey sample of 100 NR respondents or more during the study period. A sixth report looks at the characteristics of NR golfers at all other courses participating in the study.

2. Methodology

Introduction

Prior to starting up the survey Vancouver, Coast and Mountains tourism region contacted all its golf course members to inform them of the upcoming survey, obtain their input and to request their participation. A total of nine golf courses agreed to partake. They represent golf courses from all four regions as follows:

Greater Vancouver

- Mayfair Lakes Golf and Country Club
- Meadow Gardens Golf Course
- Northview Golf and Country Club
- Peace Portal Golf Club
- Westwood Plateau Golf and Country Club

Sea to Sky Country

- Furry Creek Golf and Country Club
- Big Sky Golf and Country Club

Mighty Fraser Country

- The Redwoods Golf Course

Sunshine Coast

- Sechelt Golf and Country Club

Big Sky is located 32 kilometres north of Whistler. Notably, the survey does not include any participation from the golf courses located in Whistler, which are assumed to comprise a significant volume of NR golfer visitation to the VCM tourism region overall.

The Questionnaire

VCM determined together with the participating golf courses that an onsite survey would be the most appropriate. The consultants agreed that this approach would be the least intrusive and most likely generate the highest response rates. As a backup it was decided that a mail-back survey should also be designed and made available for the golf course staff to distribute to NR golfers. The questionnaire was tested in early June. Appendix A shows the questionnaire(s) utilized in the study. A "four column" response questionnaire was designed to enable a party of four golfers to be interviewed simultaneously.

Survey holders with colourful signage were distributed to all participating golf course. They displayed the mail-back questionnaire with a self-addressed and stamped return envelope enclosed. These were usually placed within the Golf Pro Shop. Additionally, The Golf Shuttle, a VCM member providing transportation service to and from golf courses within the VCM region, was also provided with mail-back surveys for distribution to its passengers.

A prize draw of a “golf package” was offered as an incentive for participation in the survey.

Survey Team

Vancouver, Coast and Mountains hired a full-time summer student from BCIT’s Tourism Marketing program, Stephanie Kerr, to conduct the onsite interviews with golfers. TREC International Inc. provided training and back-up interview support. TREC was also responsible for overall project management and interpretation of the survey results. Joanna Dale’s role was of database design and analysis.

Sampling Plan

As described in the Introduction, the overall objective of the survey was to profile Non-Resident Golfers. These were defined as Golfers residing outside the VCM tourism region, as they fit the target profile for VCM visitors. In addition, they are the most likely to be overnight visitors. The exception was Sechelt Golf and Country Club, where NR were defined as golfers residing *outside Sunshine Coast*. The reasoning for this change in definition was the nature and length of travel required to reach the golf course and thereby the increased likelihood of attracting overnight visitors.

Initially it was intended that a survey schedule be developed in order to meet a minimum quota of 100 completed questionnaires per golf course (900 total). However, after the first several weeks of interviewing it was evident that several changeable factors affected the proportion of NR golfers at each of the golf courses and thus the reality of meeting monthly quotas per course. These factors included:

- weather;
- day of week;
- size of membership base;
- proximity to Greater Vancouver;
- daily volume of course bookings; and,
- schedules for tournaments, tour groups and other special interest groups.

Two types of golf courses emerged:

- 1) Destination Courses – generally lower membership and higher NR play (>10-15% of total golf rounds per month)
- 2) All other courses – generally higher membership play and lower NR play

Since it was important that golfers’ enjoyment not be intruded upon by the survey and that the interviewer’s time be utilized as efficiently as possible, VCM agreed with the recommendation of TREC International Inc. to concentrate surveying efforts on the courses with higher NR play. Thus, respondent selection was not entirely random. This is significant because of the nature of on-site intercepts. The Interviewer was positioned at each golf course so that the majority of golfers

would naturally approach her location as part of their regular golf play that day. An attempt was made to intercept all golfers during the Interviewer’s scheduled interview times.

The consultants and Interviewer worked closely with the golf courses to determine suitable days for interviewing. Tally Sheets were maintained to track the daily number of intercepts, number of refusals and number of completed interviews. Very few refusals occurred and the survey was deemed a friendly and fairly positive experience for respondents overall.

Survey Sample

A total of 688 NR golfers were surveyed from the 9 participating golf courses over the study period from June 2 to August 31st, 2000. By month, the data was collected as per the breakdown shown in Table 2.1.

Table 2.1 Questionnaires by Month

Month	Frequency	Percent
June	138	20.1%
July	253	36.8%
August	297	43.2%
Total	688	100%

The breakdown of the survey sample was analysed to determine overall representation of NR golfers at the 9 courses participating in the study. Each participating golf course provided the following monthly statistics for June, July and August:

- Monthly golf rounds (where 1 golf round=1 golfer)
- Estimated* percentage of golf rounds played by NR golfers

**Most golf courses do not regularly maintain records of this statistics but staff handling bookings and/or responsible for marketing have good insight and are therefore able to provide useful estimates.*

These proportions are presented in Table 2.2 (Estimated NR Play by Golf Course). The breakdown of estimated NR play by golf course was compared to the breakdown of completed questionnaires by golf courses. In line with early indications of course differences, the courses are grouped into “Destination Courses” and “All Others”. For each course in the first group, it was possible to collect the initial quota of at least 100 questionnaires over the study period. This enables individual course data to be analysed.

Table 2.2 Estimated NR Play by Golf Course and Month

NR=Non-Residents/golfers residing outside the VCM tourism region, i.e. "Destination Golfers".

* For Sechelt Golf Course, NR defined as golfers residing outside Sunshine Coast.

JUNE	Total Golf Rounds	Est. % NR Play	Est. Total NR Rounds	% of Total NR Rounds	Total Question- naires	% of Total for Month
<i>Destination Courses</i>						
Big Sky	4043	23.0%	930	12.5%	29	20.9%
Furry Creek	4292	44.5%	1,910	25.8%	54	38.8%
Northview	9001	10.0%	900	12.1%	39	28.1%
Sechelt*	3997	50.0%	1,999	26.9%	0	0.0%
<i>Other Courses</i>						
Mayfair Lakes	6716	4.0%	269	3.6%	3	2.2%
Meadow Gardens	5998	2.0%	120	1.6%	0	0.0%
Peace Portal	7298	6.0%	438	5.9%	6	4.3%
Redwoods	7650	8%	612	8.3%	8	5.8%
Westwood	4000	6.0%	240	3.2%	0	0.0%
Total	52995		7,417	100.0%	139	100.0%
JULY	Total Golf Rounds	Est. % NR Play	Est. Total NR Rounds	% of Total NR Rounds	Total Question- naires	% of Total for Month
<i>Destination Courses</i>						
Big Sky	5258	22.0%	1,157	10.6%	54	21.4%
Furry Creek	4809	50.0%	2,405	22.0%	19	7.5%
Northview	9696	20.0%	1,939	17.8%	36	14.3%
Sechelt*	5191	60.0%	3,115	28.5%	57	22.6%
<i>Other Courses</i>						
Mayfair Lakes	6784	5.0%	339	3.1%	28	11.1%
Meadow Gardens	6884	2.5%	172	1.6%	22	8.7%
Peace Portal	8608	8.0%	689	6.3%	25	9.9%
Redwoods	8423	10.0%	842	7.7%	11	4.4%
Westwood	4300	6.0%	258	2.4%	0	0.0%
Total	59953		10,915	100.0%	252	100.0%
AUGUST	Total Golf Rounds	Est. % NR Play	Est. Total NR Rounds	% of Total NR Rounds	Total Question- naires	% of Total for Month
<i>Destination Courses</i>						
Big Sky	5658	20.0%	1,132	10.4%	69	23.2%
Furry Creek	5360	48.0%	2,573	23.7%	66	22.2%
Northview	6449	20.0%	1,290	11.9%	52	17.5%
Sechelt*	5504	60.0%	3,302	30.4%	45	15.2%
<i>Other Courses</i>						
Mayfair Lakes	6918	6.0%	415	3.8%	0	0.0%
Meadow Gardens	6308	3.0%	189	1.7%	0	0.0%
Peace Portal	8393	8.0%	671	6.2%	13	4.4%
Redwoods	8224	12.0%	987	9.1%	8	2.7%
Westwood	5161	6.0%	310	2.8%	44	14.8%
Total	57975		10,869	100.0%	297	100.0%

Table 2.3 provides a summary for the study period. As shown, the overall distribution of questionnaires (into the two course types) is very similar to the characteristics of the survey population. (Compare Estimated % of Total NR Rounds with % of Total Questionnaires for “Destination Courses” and “All Others” combined).

Table 2.3 SUMMARY of Estimated Golf Rounds for Survey Period by Type

	Total Golf Rounds	Est. Total NR Rounds	% of Total NR Rounds	Total Questionnaires	% of Total
<i>Destination Courses</i>					
Big Sky	14,959	3,218	11.0%	152	22.1%
Furry Creek	14,461	6,887	23.6%	139	20.2%
Northview	25,146	4,129	14.1%	127	18.5%
Sechelt*	14,692	8,416	28.8%	102	14.8%
<i>Subtotal</i>	<i>69,258</i>	<i>22,650</i>	<i>77.6%</i>	<i>520</i>	<i>75.6%</i>
Other Courses	101,665	6,551	22.40%	168	24.4%
Total	170,923	29,201	100.0%	688	100.0%

* * For Sechelt Golf Course, NR defined as golfers residing outside Sunshine Coast.

Within the subgroup “Destination Courses” there are variances to be considered. Specifically, the possibility of over-representation of Big Sky golfers and, conversely, the possibility of under-representation of Sechelt NR golfers. However, after careful consideration it was not recommended to undertake statistical weighting to overcome such prospects. Specifically, the reasons being:

- 1) Uncertainty as to the accuracy of Estimated Total NR Rounds; and,
- 2) Modified definition of the NR respondent for Sechelt (i.e. includes residents from Greater Vancouver)

In conclusion, the data contained in this report must be interpreted in the context of the VCM golf courses which participated in the study and take into account the considerations outlined in this section.

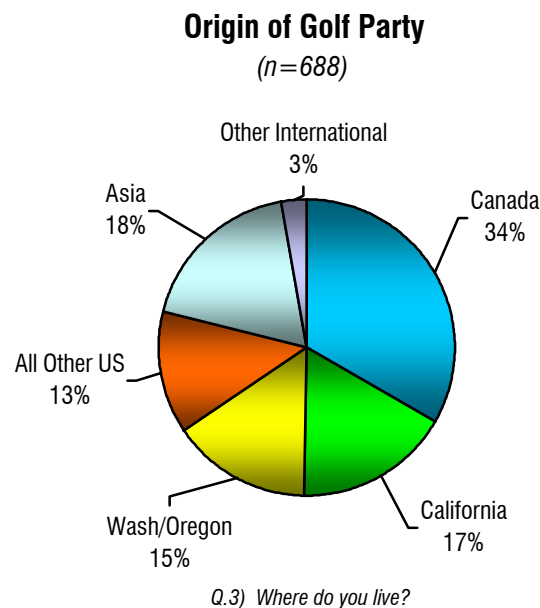
3. Survey Highlights

This section highlights key aspects of the data gathered through the 2000 Vancouver, Coast and Mountains Survey of Non-Resident Golfers. Charts and tables are presented throughout to assist with the interpretation. Detailed data printouts of the frequency of responses for each question are in the Appendices. For complete data print-outs showing cross-tabulations of respondents by the different golf courses and/or by their Origin, also see the Appendices.

Demographics

Origin of Non-Resident Golfers

Non-Resident (NR) golfers to participating golf courses in Vancouver, Coast and Mountains during the three month study period were largely international, with 45.1% overall from the United States and 21.2% of respondents coming from overseas. From the US, California (16.9%) and Washington/Oregon (15.6%) represented the greatest share of NR golfers.



When comparing the golf courses individually, further distinctions are evident:

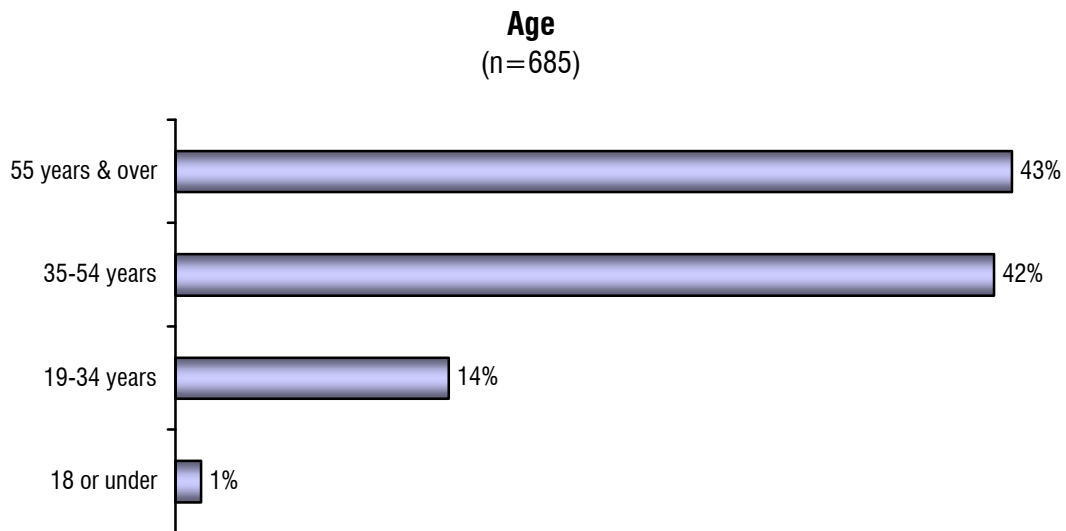
- *Big Sky* and *Furry Creek* attracted large proportions of US visitors during the study period (89% and 59% respectively). The former included a tour group from California during the month of August.
- At *Northview*, as many as 30% were from Overseas, mainly Japan and Taiwan.
- At *Sechelt*, the only golf course in the study, which included residents from Greater Vancouver as part of its sample, 85% of respondents were from Greater Vancouver.
- *Mayfair Lakes* within the *All Others* category included a tour group from Japan on an interview day during July.

Origin	Golf Course					Total n=688
	Big Sky (n=152)	Furry Creek (n=139)	Northview (n=127)	Sechelt (n=103)	All Others (n=167)	
Greater Vancouver				82.5%		12.4%
Other BC	2.0%	10.1%	3.9%	1.0%	4.2%	4.4%
Alberta	.7%	3.6%	9.4%	4.9%	14.4%	6.8%
Ontario	2.6%	9.4%	10.2%	1.9%	10.8%	7.3%
Other Canada	.7%	4.3%	2.4%	1.0%	5.4%	2.9%
Washington	22.4%	13.7%	21.3%		7.2%	13.4%
Oregon	3.3%	3.6%	1.6%	1.0%	1.2%	2.2%
California	42.8%	19.4%	10.2%	3.9%	4.2%	16.9%
Other USA	20.4%	22.3%	11.0%		6.6%	12.6%
Other Country	5.3%	13.7%	29.9%	3.9%	46.1%	21.2%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<i>Q. 3) Where do you live?</i>						

Age

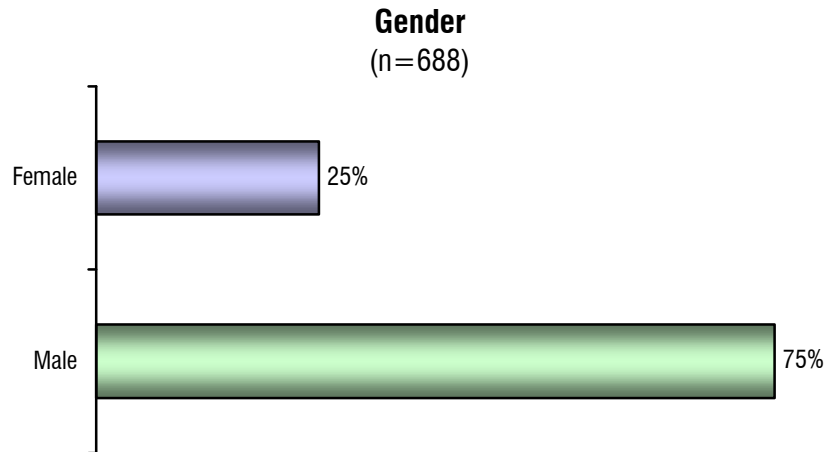
The age of survey respondents is as shown, with the majority (85%) almost equally distributed among the mid-years (35-54 years) and the 55+ category.

Age	Frequency	Percent
18 or under	9	1.3%
19-34 years	96	14.0%
35-54 years	287	41.9%
55 years & over	293	42.8%
Total	685	100.0%
<i>Missing = 3</i>		
<i>Q.20) Your age is:</i>		



Gender

The majority of survey respondents were male (75%).



Q.22) Please indicate your gender:

Female golfers tended to be somewhat older than their male counterparts. 58% of women were aged 55 years or older. The men surveyed were most likely aged 35-54 years (44%) compared to 38%, which were aged 55 years or older.

Age	Gender		Total
	Male	Female	
18 or under	1%	1%	1%
19-34 years	17%	5%	14%
35-54 years	44%	36%	42%
55 years & over	38%	58%	43%

Children

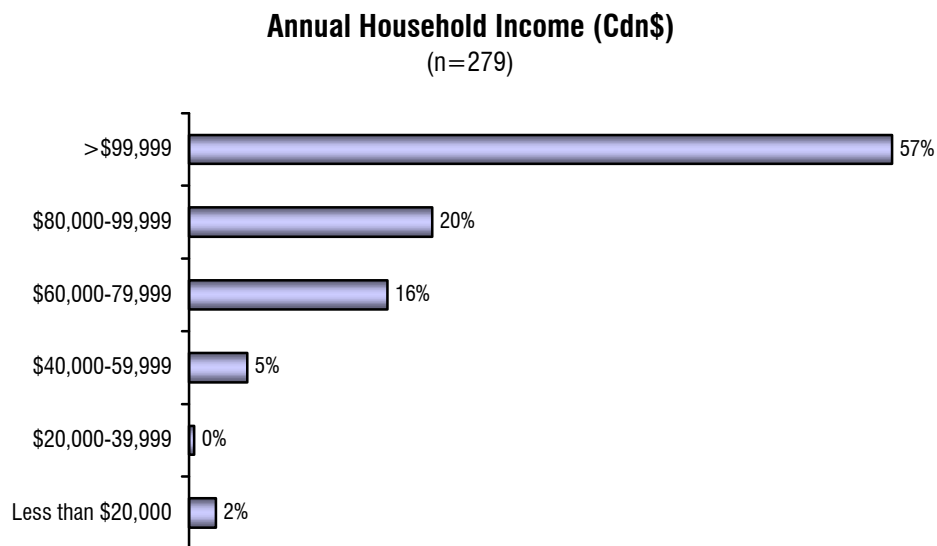
27% of respondents said they had children aged 19 years of younger. Of total survey respondents, only 8% said they had their children with them on this trip and only 3% were playing golf.

Have children aged 19 year or younger	Frequency	Percent
Yes	186	27.2
No	498	72.8
Total	684	100.0
<i>Missing = 4</i>		
<i>Q.21a Do you have children aged 19 years or younger?</i>		

Household Income

Less than half of survey respondents were willing or able to respond to the survey question regarding household income. Several golf courses participating in the study expressed concern over the personal nature of the question and the Interviewer also experienced some personal hesitation. For those who did respond (n=279), the annual household income levels recorded indicate NR golfers to VCM are high income earners, with 57% noting their earnings are within the highest category of \$100,000 or more. International visitors are the most likely to be high income earners, with 77% indicating they are in the highest category of \$100,000 or more.

(N.B. All responses in US dollars were increased to the next income range due to the rate of exchange on the US dollar, which was prevalent throughout the survey period (1.47865 over the 91 days)).



Q. 19) Which income level best represents your total annual household income?

Golfing Habits

Member of Golf Club

Respondents to the VCM Golf Survey are keen golfers, with 53% reporting membership in a golf club.

Member at Golf Club	Frequency	Percent
Yes	358	53.0%
No	317	47.0%
Total	675	100.0%
<i>Missing = 13</i>		
<i>Q.8) Are you a member at a golf club?</i>		

Canadians were the *least* likely to be members of a club (36%) compared with Californians, which were the most likely (76%). 41% of Washington/Oregon respondents indicated club membership compared to 71% for All Other US golfers. Overseas respondents also had a high propensity for club membership (59%).

Member at Golf Club	Origin					Total
	Canada	California	Wash/Oregon	All other US	Other International	
Yes	36.1%	75.9%	40.8%	70.3%	59.4%	53.0%
No	63.9%	24.1%	59.2%	29.7%	40.6%	47.0%
<i>Missing = 13</i>						
<i>Q.8) Are you a member at a golf club?</i>						

Average Number of Courses per Year

Survey respondents also tend to play several different courses each year. 45% indicated that on average they play between 10 and 19 different golf courses per year.

Number of Golf Courses played	Frequency	Percent
0-4 golf courses	59	8.8%
5-9 golf courses	109	16.3%
10-14 golf courses	179	26.7%
15-19 golf courses	123	18.4%
20-25 golf courses	100	14.9%
26-30 golf courses	28	4.2%
> 30 golf courses	72	10.7%
Total	670	100.0%
<i>Missing = 18</i>		
<i>Q.4) Average number of golf courses played per year</i>		

Average Number of Rounds per Year

The number of different courses translates to average annual golf rounds as shown. Nearly 22% of respondents indicated they play over 100 rounds of golf per year.

Average number of golf rounds played per year	Frequency	Percent
0-5 rounds	39	5.7%
6-10 rounds	31	4.6%
11-15 rounds	38	5.6%
16-25 rounds	76	11.2%
26-49 rounds	144	21.2%
50-99 rounds	205	30.1%
100-199 rounds	125	18.4%
> 199 rounds	22	3.2%
Total	680	100.0%
<i>Missing = 8</i>		
<i>Q.5) On average, how many rounds of golf do you play per year?</i>		

Number of Overnight Vacations with Golf per Year

The likelihood of taking an overnight vacation *with golf* is also an indicator of respondents' golf enthusiasm. 74% said they take 2 or more vacations of this type per year.

Number of Overnight Vacations	Frequency	Percent
0-1 vacations with golf	183	26.8%
2-3 vacations with golf	350	51.3%
4-5 vacations with golf	91	13.3%
6-7 vacations with golf	30	4.4%
>7 vacations with golf	28	4.1%
Total	682	100.0%
<i>Missing = 6</i>		
<i>Q.9) On average, how many overnight vacations combined with golfing do you take per year?</i>		

Overall, US and international golfers tended to indicate higher levels of play on different courses, higher annual golf rounds (especially Californians) and more frequent golf vacations than Canadian respondents to the survey.

Number of overnight vacations combined with golf taken per year	Origin (n=682)					Total %
	Canada	California	Wash/Oregon	All other US	Other International	
0-1 vacations with golf	45.5%	11.2%	21.0%	23.7%	15.3%	26.8%
2-3 vacations with golf	43.7%	46.6%	45.7%	57.0%	68.6%	51.3%
4-5 vacations with golf	5.6%	28.4%	23.8%	9.7%	8.0%	13.3%
6-7 vacations with golf	1.7%	8.6%	6.7%	5.4%	2.9%	4.4%
>7 vacations with golf	3.5%	5.2%	2.9%	4.3%	5.1%	4.1%
<i>Missing =6</i>						
<i>Q.9) On average, how many overnight vacations combined with golfing do you take per year?</i>						

Golf and Business

Although combining golf with business does occur for nearly 42% of survey respondents, the remaining 58% indicated that they *never* play golf while on a business trip.

Play golf on a Business Trip	Frequency	Percent
Never	391	58.4%
Once per year	45	6.7%
2-3 times per year	109	16.3%
4-5 times per year	48	7.2%
6-10 times per year	49	7.3%
11-15 times per year	13	1.9%
16-20 times per year	4	.6%
> 20 times per year	11	1.6%
Total	670	100.0%
<i>Missing = 18</i>		
<i>Q.10) On average, how often do you play golf while on a business trip (including before or after the business part of your trip is complete?)</i>		

Magazines Read

The most popular golf publication read by survey respondents was Golf Digest; 72% reported that they read prefer to read this publication over others. This magazine was consistently the most popular amongst respondents from all origins. For Canadian respondents, Golf Digest was most popular but SCORE ranked a close second (64% and 49% of Canadian respondents respectively).

Golf Publications Read	Frequency	Percent of Cases
Golf Digest	194	71.9%
Score	55	20.4%
Inside Golf	11	4.1%
Score Women	10	3.7%
Pacific Northwest Golfer	10	3.7%
Pacific Golf	9	3.3%
Golf & Travel	9	3.3%
Alberta Golfer	2	.7%
VCM Golf Guide	1	.4%
Other	102	37.8%
<i>Missing = 418</i>		
<i>Q.18) Which Canadian and or US golf publications do you prefer to read?</i>		
<i>Note: Percentages do not add to 100% because respondents could select more than one publication</i>		

Trip to Vancouver, Coast and Mountains

Primary Purpose

Golf (35%) and General Sightseeing (35%) were the most popular reasons for survey respondents' trip to Vancouver, Coast and Mountains. The balance of respondents came mainly to Visit Friends and Relatives (11%) or for a Business/Conference (11%).

Primary Purpose	Frequency	Percent
Golfing	242	35.5%
General sightseeing	238	34.9%
Visit friends/relatives	78	11.5%
Business/conference	76	11.2%
Marine activities	6	.9%
Personal matters	4	.6%
Adventure/wilderness activities	2	.3%
Participate/attend sport event	1	.1%
Other	34	5.0%
Total	681	100.0%
<i>Missing = 7</i>		
<i>Q. 12a) Which of the following best describes the primary purpose and other activities undertaken during this trip to Vancouver, Coast and Mountains Tourism Region?</i>		

For Canadians, trip purpose was more evenly distributed among Visiting Friends/Relatives (25%), General Sightseeing (23%), Golfing (23%) and Business/Conference (14%).

Primary Purpose/Activity	Origin (n=681)					Total
	Canada	California	Wash/ Oregon	All Other US	Other International	
Golfing	22.6%	50.9%	50.0%	23.7%	40.7%	35.5%
General sightseeing	23.0%	43.1%	34.0%	45.2%	41.4%	34.9%
Visit friends/relatives	24.8%	1.7%	4.7%	7.5%	5.7%	11.5%
Business/conference	14.2%	4.3%	5.7%	19.4%	10.7%	11.2%
Marine activities	1.8%				1.4%	.9%
Personal matters	1.8%					.6%
Adventure/wilderness activities	.9%					.3%
Participate/attend sport event			.9%			.1%
Other	11.1%		4.7%	4.3%		5.0%
<i>Missing = 7</i>						
<i>Q. 12a) Which of the following best describes the primary purpose and other activities undertaken during this trip to Vancouver, Coast and Mountains Tourism Region?</i>						

Secondary Activities

Golf was the most popular secondary trip activity (73% of respondents), followed by General Sightseeing (24%). Marine activities (31%) were a popular secondary activity at Sechelt, as were adventure/wilderness activities (13%) at Big Sky.

Secondary Purpose/Activity	Frequency (n=577)	Percent of Respondents
Golfing	421	73.0%
General sightseeing	137	23.7%
Shopping	96	16.6%
Visit friends/relatives	56	9.7%
Marine activities	56	9.7%
Adventure/wilderness activities	45	7.8%
Participate/attend sport event	16	2.8%
Visit/attend cultural event	7	1.2%
Business/conference	5	.9%
Personal matters	4	.7%
Other	6	1.0%
<i>Missing = 111</i>		
<i>Q.12a) Which of the following best describes the primary purpose and other activities undertaken during this trip to Vancouver, Coast and Mountains Tourism Region?</i>		
<i>Note: Total percent do not add to 100% because respondents could select more than one secondary activity.</i>		

Purchase of Prepaid Golf in VCM

Although golf was identified as a highly important part of respondents' trip to VCM, only 19% purchased a prepaid golf package before their arrival in VCM. Canadians and Washington/Oregon visitors were the least likely to do so (4% and 6%), compared to Californians and Other US visitors (20% each). As high as 51% of Other International visitors did, however, pre-purchase their golf.

Purchase prepaid golf package	Frequency	Percent
Yes	127	18.6%
No	554	81.4%
Total	681	100.0%
<i>Missing = 7</i>		
<i>Q.11) Did you purchase a prepaid golf package (includes accommodation and golf) before you arrived in Vancouver, Coast and Mountains?</i>		

Purchase prepaid golf package	Origin					Total (n=681)
	Canada (n=227)	California (n=116)	Wash/ Oregon (n=105)	All Other US (n=93)	Other International (n=140)	
Yes	3.5%	19.0%	5.7%	20.4%	51.4%	18.6%
No	96.5%	81.0%	94.3%	79.6%	48.6%	81.4%
<i>Missing = 7</i>						
<i>Q.11) Did you purchase a prepaid golf package (includes accommodation and golf) before you arrived in Vancouver, Coast and Mountains?</i>						

Golf Play on This and Previous Trips

Nearly 40% of survey respondents said they had played golf in VCM on a previous trip to the region. Canadians were the most likely to have this experience (62%), followed by respondents from Washington/Oregon (44%).

Played golf in the Vancouver Coast and Mountains Tourism Region before	Frequency	Percent
Yes	268	39.0%
No	420	61.0%
Total	688	100.0%
<i>Q.7) Have you played golf in the Vancouver, Coast and Mountains Tourism Region before?</i>		

All the courses listed in the survey were identified by at least one of the respondents with previous golfing experience in VCM. For *this trip*, respondents identified the golf courses at Whistler and Northview most frequently as the ones to be included for additional play. (See further details in Appendices.)

Played golf in the Vancouver Coast and Mountains Tourism Region before	Origin					Total n=688
	Canada n=232	California n=116	Wash/ Oregon n=107	All other US n=93	Other International n=140	
Yes	62.1%	17.2%	44.9%	19.4%	27.1%	39.0%
No	37.9%	82.8%	55.1%	80.6%	72.9%	61.0%
<i>Q.7) Have you played golf in the Vancouver, Coast and Mountains Tourism Region before?</i>						

Golf Rounds on this trip to VCM

31% of respondents to the VCM Golf survey indicated that they would only be playing one round of golf during this trip. Over 50% said they would be playing between 2 and 5 rounds and 15% were to play 6 rounds of golf or more while on this trip to VCM.

Rounds of Golf Expect to Play	Frequency	Percent
1 round	213	31.0%
2 rounds	168	24.5%
3-5 rounds	203	29.5%
6-10 rounds	86	12.5%
> 10 rounds	17	2.5%
Total	687	100.0%
<i>Missing = 1</i>		
<i>Q.6) How many rounds of golf do you expect to play on this trip to Vancouver, Coast and Mountains Tourism Region?</i>		

Trip Characteristics

Party Type and Size

Golfers surveyed for the Vancouver, Coast and Mountains Golf Survey represented a cross-section of party types. Most commonly on this trip to VCM, they were with adult friends (35%), followed by adult couple (22%). All other trip parties were well-represented, including family members (17%), adults on their own (10%), tour groups (8%) and business colleagues (6%). As noted earlier in Section 3, the respondent samples from Big Sky and Mayfair Lakes included tour groups.

Travel Party Type	Frequency	Percent
Single adult	68	10.0%
Adult couple	150	22.0%
Adult friends	237	34.8%
Family (with children)	76	11.2%
Family (no children)	37	5.4%
Business colleagues	39	5.7%
Tour group	54	7.9%
Other	20	2.9%
Total	681	100.0%
<i>Missing = 7</i>		
<i>Q.13) Which of the following best describes your travel party on this trip to Vancouver, Coast and Mountains Tourism Region?</i>		

The most common size of travel party to VCM was in multiples of twos and fours as shown. This was the same for size of golf party.

Number of people	...In Travel Party Percent (n=684)	... who are golfing today Percent (n=684)
1	8.8%	14.8%
2	26.3%	30.1%
3	4.7%	5.8%
4	21.2%	18.6%
5	3.1%	1.3%
6	5.4%	2.8%
7	1.2%	1.0%
8	7.9%	7.7%
9 or greater	21.4%	17.8%
<i>Q. 14) Travel Party and Q.15) Golf party</i>		

As noted earlier in this section under the discussion about origin, respondents from two of the golf courses, Big Sky and Mayfair Lakes, included tour groups. This naturally affects average party size. Therefore, average party size has been calculated in two ways for comparison as shown:

Average Party size	Respondents representing Parties of 8 people or less	All Respondents
Sample size	537	680
Mean	3.56 people	7.6 people
Median	3.0 people	4 people
Standard deviation	2.0681	9.4619

Length of Stay

Less than 2% of survey respondents were on a daytrip. For the rest, a stay of one night or more was part of their golf experience as shown in the table

Number of Nights	Frequency	Percent
1	43	6.6%
2	105	16.2%
3	84	12.9%
4	67	10.3%
5	101	15.5%
6	46	7.1%
7	84	12.9%
8	19	2.9%
9	13	2.0%
10	18	2.8%
11 or more	70	10.9%
	650	100.0%
<i>Missing 39</i>		
<i>Q. 16) Number of nights in VCM.</i>		

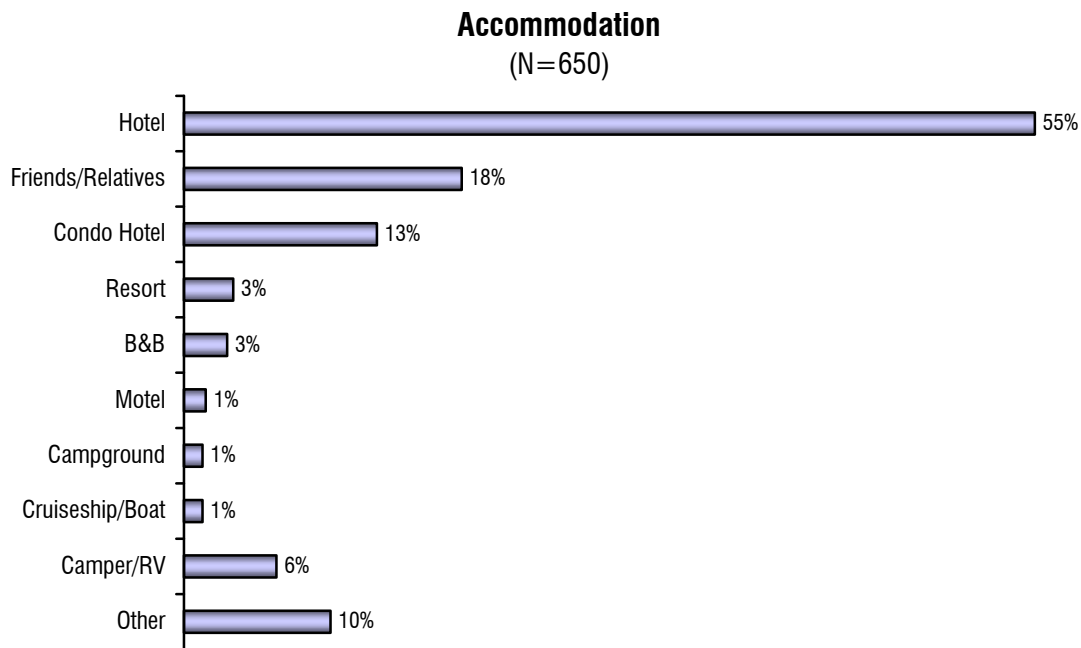
Average length of stay was calculated as shown. NR Golfers are spending a healthy length of time to experience VCM golf and their other activities.

Average Length of Stay	Respondents representing Parties of 8 people or less	All Respondents
Sample size	500	648
Mean	6.32 nights	5.73 nights
Median	5.0 nights	5.0 nights
Standard deviation	4.8695	4.5974

Accommodation Type

Hotels were the most popular form of accommodation for survey respondents.

Accommodation Type	Frequency (n=650)	Percent
Hotel	358	55.1%
Friends/Relatives	117	18.0%
Condo Hotel	81	12.5%
Resort	21	3.2%
B&B	18	2.8%
Motel	9	1.4%
Campground	8	1.2%
Cruiseship/Boat	8	1.2%
Camper/RV	4	.6%
Other	62	9.5%
<i>Missing 38</i>		
<i>Q. 16) ... accommodation types during this visit to VCM.</i>		



Expenditures per person per night

(NR Golfers at participating VCM golf courses during June, July and August 2000)

Respondents were asked to estimate the trip expenditures of their *travel party* to Vancouver, Coast and Mountains (N.B. *not* the estimated expenditures of their golf party). Consultation with the Interviewer revealed that respondents of large groups had great difficulty estimating party expenditures. Therefore, estimates of trip expenditures per person per night are based on data provided by respondents of parties representing *8 or less people*. Travel parties of this size represent 80% of respondents.

Expenditures per person per night Respondents representing Parties of 8 people or less (Canadian dollars*)	
Sample size	420
Mean	\$162.14
Median Statistic	\$125
Std. Deviation	\$165.58
<i>Missing 117</i>	
<i>Q. 14) How many people in total are in your travel party to VCM?</i>	
<i>Q. 16) Total number of nights that you and your party will spend in VCM?</i>	
<i>Q. 17) Approximately how much do you estimate your travel party will spend in VCM?</i>	

* An average rate of exchange for the survey period June 2 to August 31, 2000 of 1.47865 was used to convert US dollar expenditures to Canadian dollars.