

**District of Sechelt
Home Based Business**

FINDINGS

December 28th, 2001

Table of Contents

	Page
BACKGROUND	3
METHODOLOGY	3
Sampling Size & Accuracy	3
Study Questionnaire	4
Data Collection	4
Data Analysis	4
FINDINGS	4
Expectations for Future Primary Employers	5
Acceptance of Home-based Business Attributes	5
Importance of Tourism	8
Direction of Tourism Development	8
Acceptance of Owner-Occupied Short-term Rental Properties	9
Respondent Demographics	11
ADDENDUM	
Appendix A – Study Questionnaire	

District of Sechelt Short-Term Rental Study

FINDINGS

BACKGROUND

The overall objective of the Short-Term Rental Study was to measure the attitude and opinions of the residents of the District of Sechelt regarding the issue of short-term rental tourist accommodations. As well, in order to allow for a better understanding of residents' attitudes and opinions, additional background questions on the tourism/hospitality industry were asked.

METHODOLOGY

The recommended methodology was a stratified random sample telephone survey, as it provided the most representative, cost-effective and time-efficient manner of collecting the required information from District of Sechelt residents.

Sample Size & Accuracy

The stratified telephone survey consisted of a randomly selected sample of 400 respondents, with additional interviews completed in the smaller communities in order to allow for community-by-community results. The following table outlines the study sample sizes and levels of accuracy they provide:

	<u>Population</u>	<u>Sample Size</u>	<u>Accuracy</u>
Resident Population Survey	7,500	400	+/-5.0%
<u>Group of 7</u>			
Davis Bay Wilson Creek/Selma Park	28%	110	+/-10.0%
East Porpoise Bay	4%	16 (+84)	+/-10.0%
Sandy Hook	6%	24 (+76)	+/-10.0%
Sechelt Village	27%	107	+/-10.0%
Tuwanek	4%	16 (+84)	+/-10.0%
West Porpoise Bay	6%	24 (+76)	+/-10.0%
West Sechelt	26%	103	+/-10.0%

(The figures that appear in parenthesis represent the additional number of interview, or over-sampling, required to provide results that are representative of the communities' respective population.)

There were a total of 720 interviews completed. These interviews were accounted by a 400-sample survey representative of the entire District of Sechelt and 320 additional interviews (over-sampling) required to provide representative results for each community within Sechelt.

The 400-sample survey yields results, in 95 out of 100 times, that are within +/- 5.0% points of a survey of the entire study population.

Study Questionnaire

Representatives of the District of Sechelt and Waugh Research jointly developed the study questionnaire. The questionnaire required approximately 10 minutes for completion. Please see Appendix A – Study Questionnaire.

Data Collection

The telephone interviews were conducted during a four-week period beginning the first week of December 2001. All interviewing was conducted during either weekday evenings or Saturdays to provide the most representative sample of the study population. Up to three call attempts, five rings per call were made to ensure a high rate of completion with District of Sechelt residents.

Data Analysis

The data analysis was completed using Statistical Package for Social Sciences (SPSS Version 8.0) software.

Data derived from sample populations are subject to variance. In order not to imply an unwarranted degree of precision, all percentage figures in this report have been rounded to whole numbers; therefore percentages may not total 100.

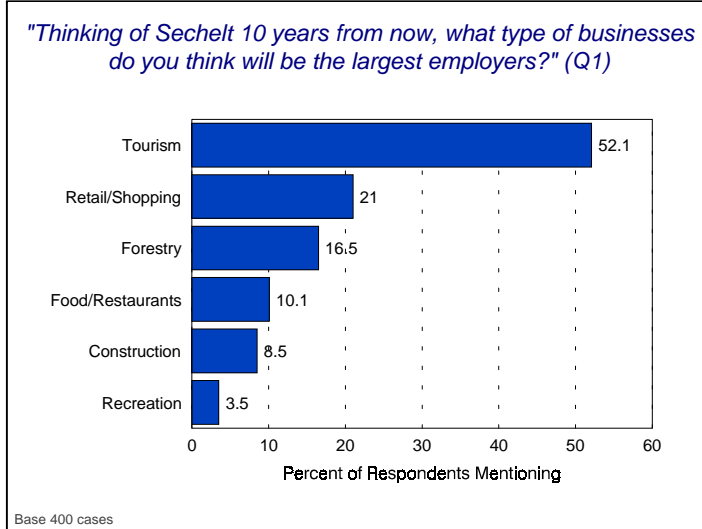
Further, it should be noted that percentages derived from “actual” bases of less than 100 respondents should be interpreted with caution, while percentages derived from “actual” bases of less than 50 should be interpreted with extreme caution.

FINDINGS

Italicized graph titles indicate the exact wording as used on the questionnaire. The order of the results' presentation is the same as the question presentation during the interview. Please refer to Appendix A to review the Study Questionnaire.

Expectations for Future Primary Employers

Over 50% of residents believe that Tourism will be Sechelt's largest employer in 10 years time. Twenty-one percent of residents believe that Retail will provide a large number of jobs, while 17% believe Forestry will provide many jobs. Residents certainly recognize the role Tourism will play in the local economy.



	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Tourism	55%	52%	54%	59%	52%	52%	51%	52%
Retail/Shopping	22%	20%	21%	23%	19%	20%	21%	21%
Forestry	15%	18%	18%	19%	17%	16%	19%	17%
Food/Restaurants	12%	10%	9%	11%	8%	7%	13%	10%
Construction	12%	10%	6%	13%	3%	9%	8%	9%
Recreation	3%	5%	8%	2%	9%	4%	3%	4%

Please note the initials in column 2 through 7 refer to Sechelt neighbourhoods according to the following key: DB/WC/SP=Davis Bay/Wilson Creek/Selma Park; EPB=East Porpoise Bay; SH=Sandy Hook; SV=Sechelt Village; T=Tuwaneke; WPB=West Porpoise Bay; and WS=West Sechelt.

Acceptance of Home-Based Business Attributes

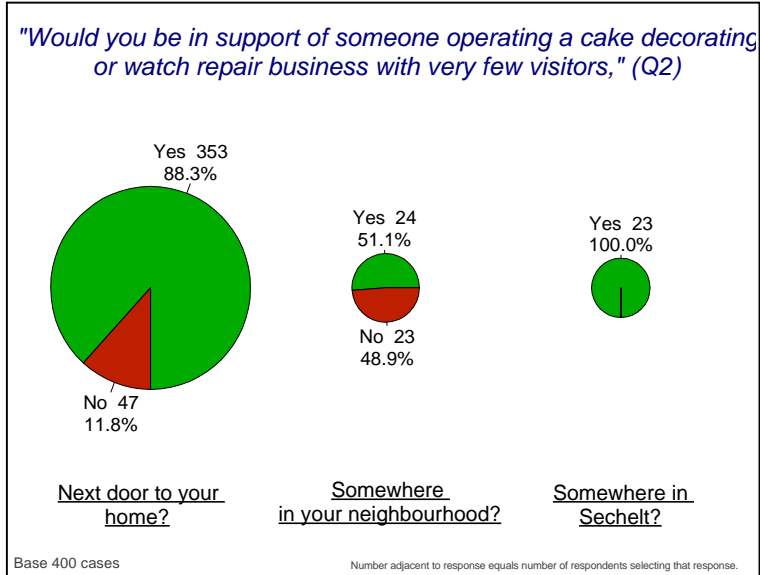
In order to measure residents' level of acceptance of various types of home-based businesses four distinct home-based business scenarios were created. Each scenario represents a different combination of attributes commonly affecting the acceptance level of home-based businesses, that of noise and traffic. Even though these scenarios are not precise measurements of public opinion, they do provide an indication of the level of support. Further to that a comparison of the each scenarios results shows the relative support for each.

As the following table indicates, the level of noise created by home-based businesses has the greatest influence on their acceptance. This finding is confirmed the question measuring the factors most important to the acceptance of home-based businesses. (Question 9 results on page 8)

	Limited Noise & Traffic (Cake Decorating/Watch Repair)	Limited Noise & Moderate Traffic (Hair Salon)	Moderate to High Noise & Limited Traffic (Auto Restoration)	Moderate to High Noise & Traffic (Country Inn & Rest.)
Yes	88%	85%	17%	44%
No	12%	15%	83%	56%

There is a high level of acceptance for home-based businesses that have a limited impact on the immediate neighbours, either as a result of noise or traffic.

*Please note the varying sizes of pie charts reflect the number of respondents on which each subsequent question level is based. I.E. The first chart (left-hand side) is based on 400 respondents, 47 of which answered No. The middle chart is based on 47 respondents, 23 of which answered No. The right hand chart is based on 23 respondents, 23 of which answered Yes.

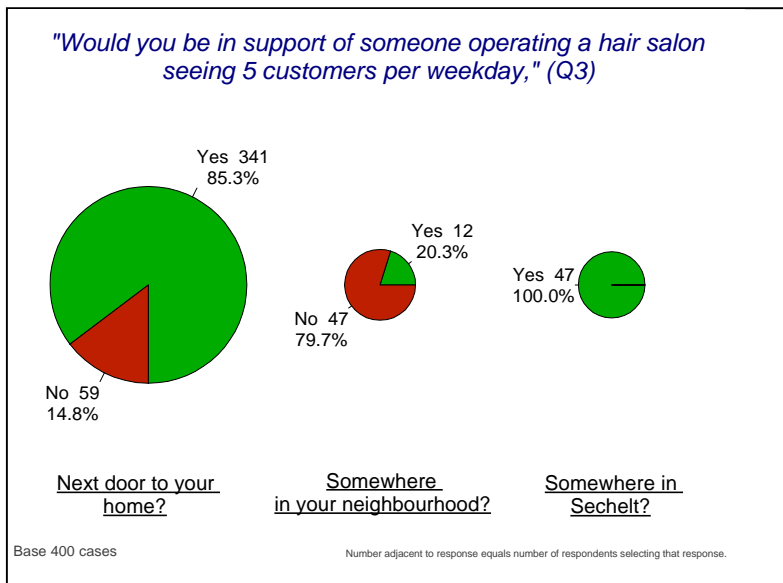


The lowest level of acceptance for limited noise and limited traffic home-based businesses is found in Tuwanek, while the highest level of acceptance is found within Sechelt Village.

Next Door?	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Yes	91%	87%	90%	95%	85%	86%	91%	88%
No	9%	13%	10%	5%	15%	14%	9%	12%

*Please note that the follow-up neighbourhood and Sechelt question results are based on too few responses for them to be valid.

There is a high level of acceptance for home-based businesses that have limited noise and moderate traffic. *Please note the varying sizes of pie charts reflect the number of respondents on which each subsequent question level is based.

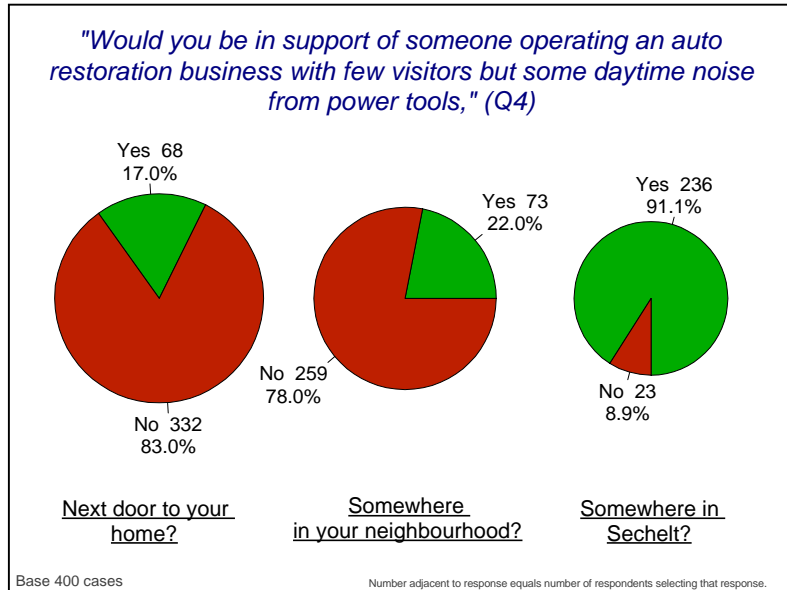


The lowest level of acceptance for limited noise and moderate traffic home-based businesses is found in Tuwanek, while the highest level of acceptance is found within Sechelt Village.

Next Door?	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Yes	86%	87%	85%	90%	82%	82%	86%	85%
No	14%	13%	15%	10%	18%	18%	14%	15%

*Please note that the follow-up neighbourhood and Sechelt question results are based on too few responses for them to be valid.

As compared to other types of home-based businesses, there is a considerably lower level of acceptance for home-based businesses that produce moderate to high levels of noise and limited to moderate traffic. *Please note the varying sizes of pie charts reflect the number of respondents on which each subsequent question level is based.

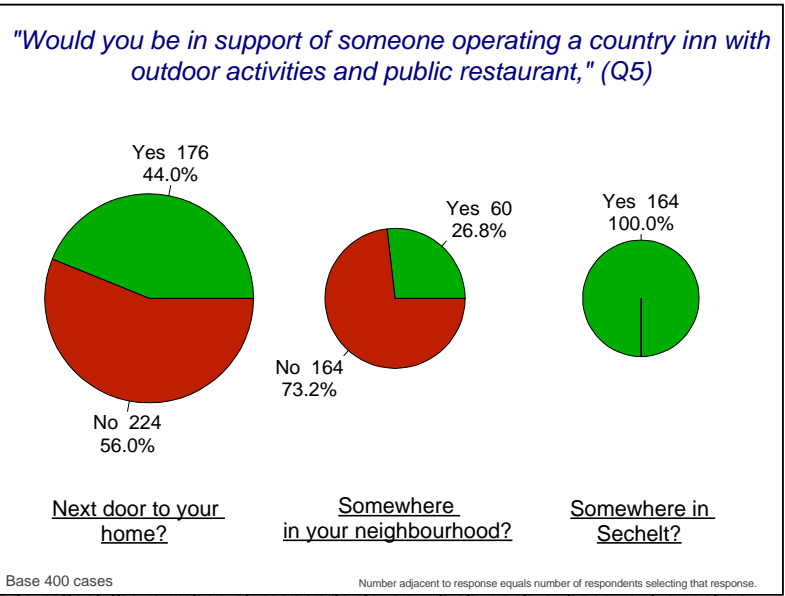


The lowest level of acceptance for moderate to high levels of noise and low to moderate traffic home-based businesses is found in Tuwanek, while the highest level of acceptance is found within Sechelt Village.

	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Yes	19%	21%	13%	15%	12%	11%	9%	17%
No	81%	79%	87%	85%	88%	89%	91%	83%

*Please note that the follow-up neighbourhood and Sechelt question results are based on too few responses for them to be valid.

There is a fair level of acceptance for the operation of a country inn that produces moderate to high levels of noise and moderate to high levels of traffic. In comparison to the auto restoration business example, it is believed that even though this example would produce higher levels of traffic and noise it is the type of traffic and noise produced,



*Please note the varying sizes of pie charts reflect the number of respondents on which each subsequent question level is based.

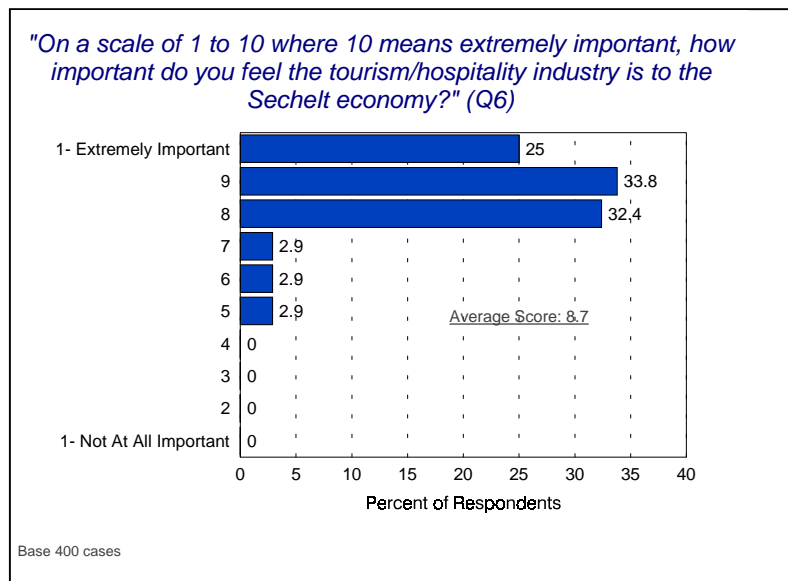
The lowest level of acceptance for moderate to high levels of noise and moderate to high levels of traffic home-based businesses is found in Tuwanek, while the highest level of acceptance is found within Sechelt Village.

	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Yes	48%	43%	34%	45%	33%	44%	45%	44%
No	52%	57%	66%	55%	67%	56%	55%	56%

*Please note that the follow-up neighbourhood and Sechelt question results are based on too few responses for them to be valid.

Importance of Tourism

Again, it is clear that residents feel the Tourism/Hospitality Industry is extremely important to the Sechelt economy. There is an indication that residents are and will continue to be supportive of the industry's development.



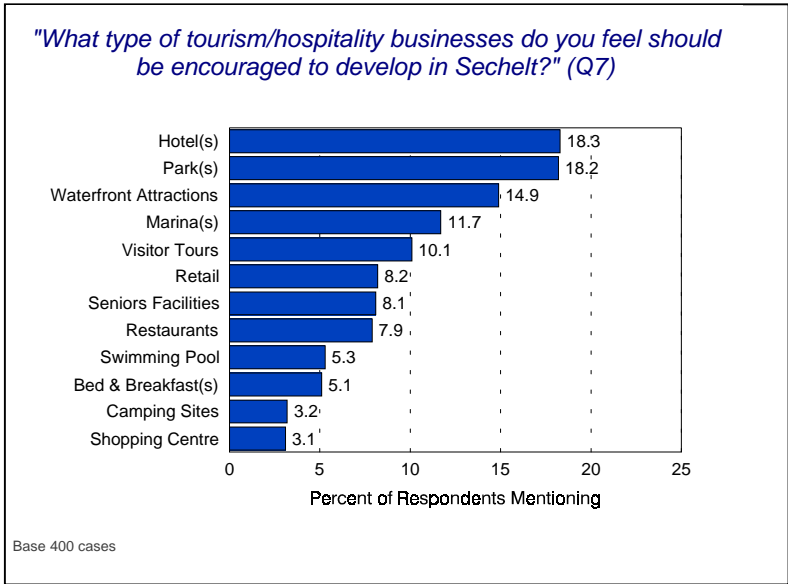
In general terms, residents within each of Sechelt's neighbourhoods show an equal level of support for the tourism industry.

Tourism/Hospitality Industry	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Average Rating of Importance	8.9	8.3	8.2	9.1	8.7	8.7	8.9	8.7

Direction of Tourism Development

A combined 27% of comments support the development of the waterfront and of a marina or marinas. Residents are also interested in seeing a large hotel property developed in Sechelt along with the creation/development of local parks.

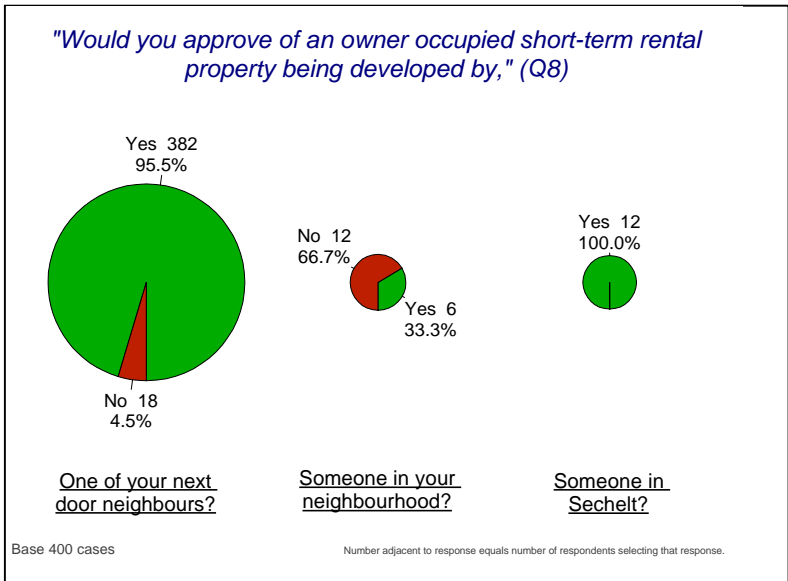
These results are the same throughout all Sechelt neighbourhoods.



*Please note the individual neighbourhood results are not presented due to the number of response variables the corresponding level of accuracy this number of responses provides for each neighbourhood.

Acceptance of Owner-Occupied Short-term Rental Properties

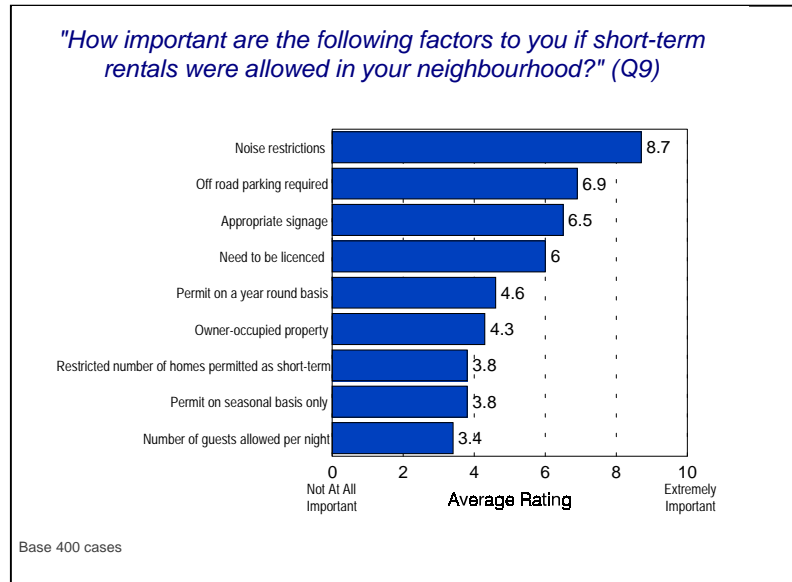
With the exception of Tuwanek, there is strong acceptance throughout Sechelt for permitting owner-occupied short-term rental properties, given certain guidelines are followed and restrictions enforced. Please see next section results.



Next Door?	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Yes	92%	96%	95%	95%	55%	96%	95%	95%
No	8%	4%	5%	5%	45%	4%	5%	5%

*Please note that the follow-up neighbourhood and Sechelt question results are based on too few responses for them to be valid.

The most important factors in allowing short-term rentals are Noise Restrictions, Off Road Parking Requirements, Appropriate Signage and the Need to be Licensed. Although residents are supportive of short-term rentals they have concerns regarding how they are operated and how the District enforces any restrictions.



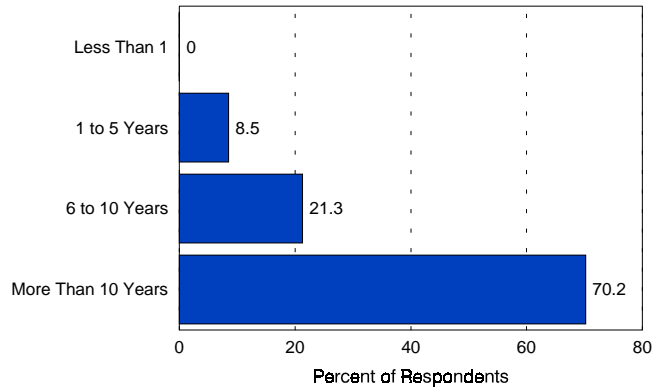
Individual neighbourhood results are generally consistent with the District-wide ratings, with the exception of Tuwanek that rated each factor higher than the District-wide ratings.

Average Rating of Importance	DB/WC/SP (110)	EPB (100)	SH (100)	SV (107)	T (100)	WPB (100)	WS (103)	All (400)
Noise restrictions	8.7	8.7	8.9	8.5	9.1	8.7	8.9	8.7
Off road parking required	7.0	6.9	7.3	6.5	7.3	6.9	7.3	6.9
Appropriate signage	6.6	6.5	6.5	7.0	6.7	6.3	7.1	6.5
Need to be licensed	5.9	5.9	6.0	5.8	7.9	6.0	6.0	6
Permit on a year round basis only	4.5	4.6	4.8	4.1	5.1	4.6	4.8	4.6
Owner-occupied property	4.4	4.3	4.7	4.9	8.1	4.2	4.3	4.3
Restricted number of homes permitted as short-term	3.9	3.6	3.8	3.5	5.2	3.7	4.1	3.8
Permit on seasonal basis only	3.7	3.8	3.9	3.2	4.2	3.8	3.9	3.8
Number of guests allowed per night	3.1	3.3	3.4	3.6	4.1	3.3	3.9	3.4

Respondent Demographics

The length of residents' tenure in Sechelt is within the expected parameters, given the demographics and population growth within the District.

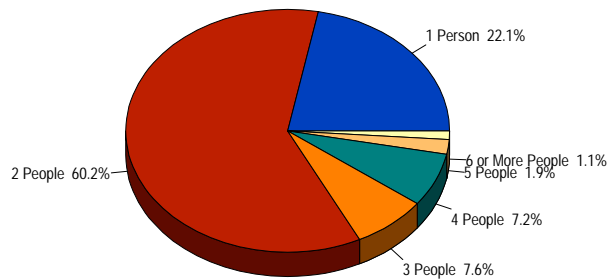
"How many years have you lived in the District of Sechelt?" (D1)



Base 400 cases

Over three quarters of the household's have 2 or more residents.

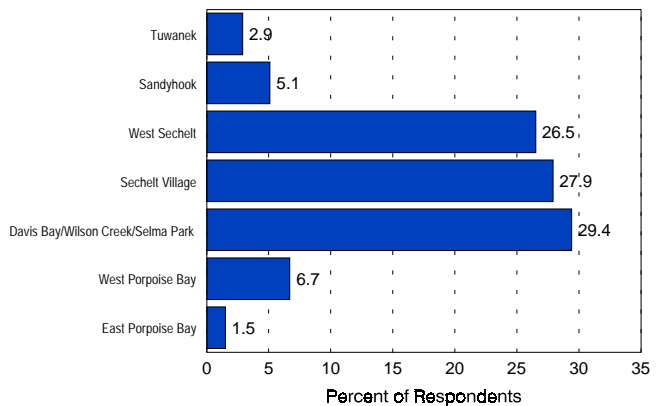
"How many people including yourself live in your household?" (D2)



Base 400 cases

The percentage of respondents interviewed in each of the seven defined neighbourhoods is within three percentage points of District of Sechelt's population distribution.

"In what part of Sechelt do you live?" (D3)

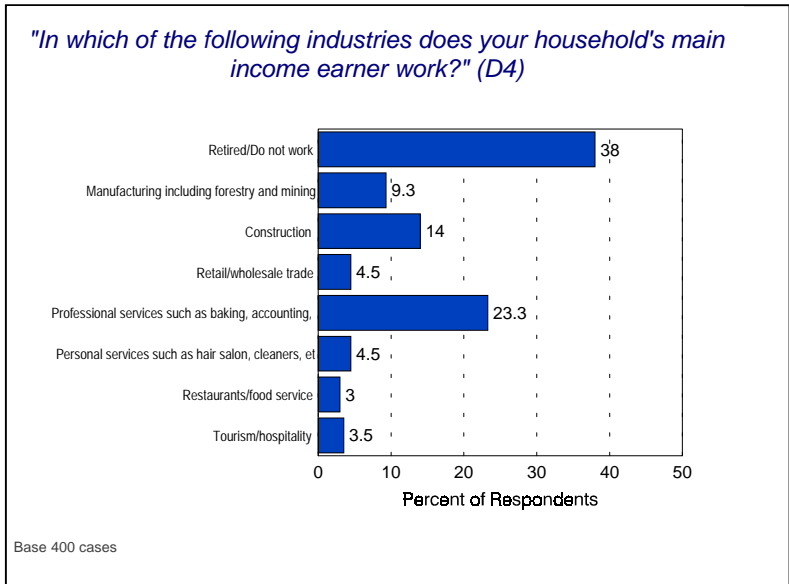


Base 400 cases

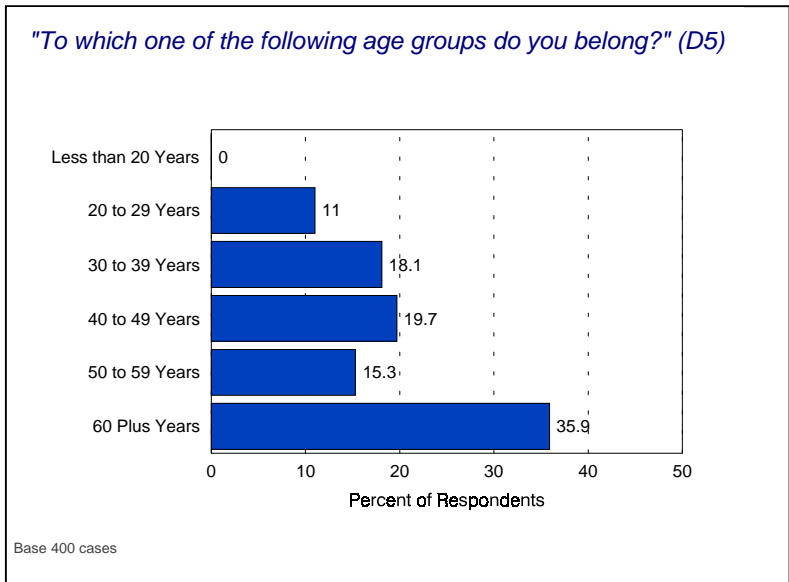
The following table out-lines the percentage of District of Sechelt's population that lives within each of the seven defined neighbourhoods:

<u>Neighbourhood</u>	<u>Percent of Sechelt Population</u>
Tuwanek	4%
Sandy Hook	6%
West Sechelt	26%
Sechelt Village	27%
Davis Bay/Wilson Creek/Selma Park	28%
West Porpoise Bay	6%
East Porpoise Bay	4%

The distribution of household's main income earner's occupation is within the expected parameters for the District of Sechelt.



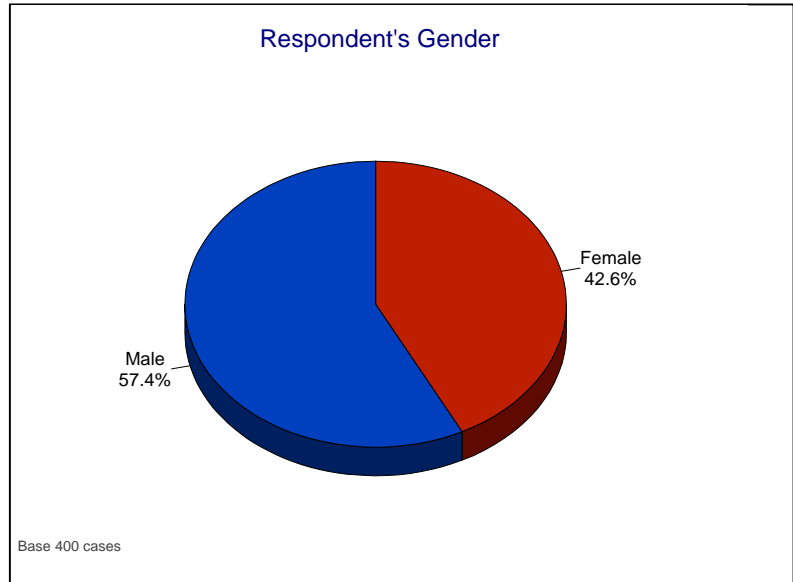
The percentage of respondents interviewed in each studied age group is within two percentage points of District of Sechelt's population age distribution.



The following table outlines the percentage of District of Sechelt's population within each studied age groups:

<u>Age</u>	<u>Percent of Sechelt Population</u>
20-29 Years	11%
30-39 Years	18%
40-49 Years	20%
50-59 Years	15%
60+ Years	36%

Fifty-seven percent of the respondents were male.



ADDENDUM
Appendix A – Study Questionnaire

District of Sechelt – Short-Term Rental Study

Hello this is _____ of Waugh Research calling on behalf of the District of Sechelt. We are conducting a quick, confidential survey to measure Sechelt residents' attitudes and opinions on the community's future development. Your number has been randomly selected and all your answers will be kept strictly confidential.

Do you live in the District of Sechelt? Yes **CONTINUE** No **THANK-TERMINATE**

PLEASE CIRCLE OR RECORD RESPONSES.

1. Thinking of Sechelt 10 years from now, what type of businesses do you think will be the largest employers? **(READ LIST – RECORD)**

There are many ways to increase job growth. Recently we have seen a lot of growth in home occupations or businesses. To determine the support for various types of home occupation or businesses I would like to ask your opinions about the following four examples of home businesses:

2. Would you be in support of someone operating a cake decorating or watch repair business with very few visitors,
a. next door to your home?

Yes **(Goto Q3)** No Why do you feel that way? _____ **(Goto b)**

b. somewhere in your neighbourhood?

Yes **(Goto Q3)** No Why do you feel that way? _____ **(Goto c.)**

c. somewhere in Sechelt?

Yes **(Goto Q3)** No Why do you feel that way? _____ **(Goto Q3)**

3. Would you be in support of someone operating a hair salon seeing 5 customers per weekday,

a. next door to your home?

Yes **(Goto Q4)** No Why do you feel that way? _____ **(Goto b)**

b. somewhere in your neighbourhood?

Yes **(Goto Q4)** No Why do you feel that way? _____ **(Goto c.)**

c. somewhere in Sechelt?

Yes **(Goto Q4)** No Why do you feel that way? _____ **(Goto Q4)**

4. Would you be in support of someone operating an auto restoration business with few visitors but some daytime noise from power tools

a. next door to your home?

Yes **(Goto Q5)** No Why do you feel that way? _____ **(Goto b)**

b. somewhere in your neighbourhood?

Yes **(Goto Q5)** No Why do you feel that way? _____ **(Goto c.)**

c. somewhere in Sechelt?

Yes **(Goto Q5)** No Why do you feel that way? _____ **(Goto Q5)**

5. Would you be in support of someone operating a country inn with outdoor activities and public restaurant

a. next door to your home?

Yes **(Goto Q6)** No Why do you feel that way? _____ **(Goto b)**

b. somewhere in your neighbourhood?

Yes **(Goto Q6)** No Why do you feel that way? _____ **(Goto c.)**

c. somewhere in Sechelt?

Yes **(Goto Q6)** No Why do you feel that way? _____ **(Goto Q6)**

6. On a scale of 1 to 10 where 10 means extremely important, how important do you feel the tourism/hospitality is to the Sechelt economy? 1 2 3 4 5 6 7 8 9 10

7. What types of tourism/hospitality businesses do you feel should be encouraged to develop in Sechelt?

8. Would you approve of an owner occupied short-term rental property being operated by

a. one of your next-door neighbours?

Yes What limitations should be imposed on them, if any? **(Goto Q9)**

No Why do you feel that way? _____ **(Go to b)**

b. someone in your neighbourhood?

Yes What limitations should be imposed on them, if any? **(Goto Q9)**

No Why do you feel that way? _____ **(Go to c)**

c. someone in Sechelt?

Yes What limitations should be imposed on them, if any? **(Goto Q9)**

No Why do you feel that way? _____ **(Next Q)**

9. How important are the following factors to you if short-term rentals were allowed in your neighbourhood. Please rate on a scale of 1 to 10 where 10 means extremely important.

	<u>Not At All Important</u>					<u>Extremely Important</u>				
a restricted number of homes permitted to be used as short-term rentals	1	2	3	4	5	6	7	8	9	10
permit them on a seasonal basis only	1	2	3	4	5	6	7	8	9	10
permit them on a year round basis	1	2	3	4	5	6	7	8	9	10
licenced businesses by the District	1	2	3	4	5	6	7	8	9	10
signage	1	2	3	4	5	6	7	8	9	10
off road parking requirements	1	2	3	4	5	6	7	8	9	10
number of guests allowed per night	1	2	3	4	5	6	7	8	9	10
noise restrictions or guidelines	1	2	3	4	5	6	7	8	9	10
owner occupied property	1	2	3	4	5	6	7	8	9	10

DEMOGRAPHICS

The last few questions are so we can better understand your answers.

D1. How many years have you lived in the District of Sechelt (or on the Sunshine Coast)? _____

D2. How many people, including yourself, live in your household? _____

D3. In what part of Sechelt do you live? **(READ OPTIONS IF CLARIFICATION IS NEEDED)**

Tuwanek 1	West Sechelt 3	Davis Bay/Wilson Creek/Selma Park 5
Sandyhook 2	Sechelt Village 4	West Porpoise Bay 6 East Porpoise Bay 7

D4. In which of the following industries does your household's main income earner work? **(READ OPTIONS)**

Retired/do not work	1	Professional services such as banking, accounting, etc.	5
Manufacturing including forestry and mining	2	Personal services such as hair salon, cleaners etc.	6
Construction	3	Restaurants/food service	7
Retail/wholesale trade	4	Tourism/hospitality	8

D5. To which one of the following age groups do you belong? **(READ OPTIONS)**

< 20 years	1	40-49	4	Refused	7
20-29	2	50-59	5		
30-39	3	60 Plus	6		

And finally for verification purposes what is your first name _____

Thank respondent

Record telephone number from call sheet _____

Record Respondent's Gender Male 1 Female 2