



Public Perceptions of British Columbia's Tourism Industry

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A photograph of the Point Atkinson Lighthouse, a white tower with a red lantern room, situated on a rocky cliff overlooking the ocean. The foreground is filled with large, light-colored rocks and some dry grass. In the background, a small white building and a radio tower are visible on the cliff. The sky is blue with some clouds, and the ocean is visible in the distance.

1. Executive Summary

Point Atkinson Lighthouse, Vancouver, Coast & Mountains

Executive summary



Economic Impacts

- BC residents overwhelmingly believe that the tourism industry plays an important role in the economic well-being of the province (94%), and their individual communities (80%).
- A high proportion (79%) also agree that tourism creates career opportunities, is an important investment in growing BC's economy/communities (79%), and generates substantial tax revenues (78%).
- All age groups, over 55 (98%), 35-54 (94%), and 18-24 (86%), believe the tourism industry important to British Columbia's economy.
- Post-pandemic, there is a decrease in the percentage of residents who think the tourism industry is more stable than most other industries (26% now versus 54% in 2019) and who believe that wages in the tourism industry are higher than most other industries (19% now versus 28% in 2019).
- Looking at the tourism industry in the context of the BC economy as a whole, residents expect the largest contributors of new jobs and economic activity in their community, locally and provincially, during the next five years to be tourism and construction.

Executive summary



Environmental / Socio-Cultural Impacts

- Overall, there is agreement on many positive non-economic impacts of tourism. Roughly eight-in-ten residents agree that:
 - Tourism brings people from diverse backgrounds and cultures into their community (81%).
 - They appreciate visitors for the contribution that they make to their local economy (81%).
 - Their community is welcoming to all visitors (80%).
 - The tourism industry supports local businesses in their community (79%).
 - Their community is a desirable place to visit (79%).
- Due to the impacts of the COVID-19 pandemic, 61% of BC residents feel that they can now better understand the value of the tourism industry.
- Roughly half of respondents (47%) believe that residents are involved and play a role in influencing the planning and development of tourism in their community.
- There is a decrease in residents who feel that their community is in a good position to welcome visitors in respects to infrastructure and accessibility, since 2019 (69% now versus 78% in 2019).
- Since 2019, BC residents' perception of the environmental impacts of tourism have slightly dipped:
 - About half of BC residents (54%) think that the tourism industry supports the use of more locally produced goods, services and agricultural products than most other industries (down from 62% in 2019).
 - About half of BC residents (45%) believe the tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes (down from 52% in 2019).

Executive summary



Openness To Tourism

- Over half of residents (54%) want more tourism in British Columbia in the next five years, compared to before the pandemic. Approximately 43% would like to see an increase in tourism to their individual community.
- Northern BC residents are the most likely to say they want more tourism to their community (59%), whereas Sunshine Coast / Bowen residents are the least likely (31%).
- Most BC residents believe the positive impacts of tourism outweigh the negatives (75%), and want to see tourism continue to grow in their community (66%). As well, eight in ten (79%) agree their community is a desirable place to visit, and seven in ten (72%) take pride in making visitors feel welcome to their community.

An aerial photograph of Prince Rupert, British Columbia, Canada, taken during the "golden hour" of sunset. The harbor is filled with numerous boats, including fishing vessels and smaller recreational boats, moored at various piers. The town is visible in the background, nestled at the foot of a large, rugged mountain. The sky is filled with dramatic, colorful clouds in shades of orange, pink, and purple. The water reflects the warm light from the setting sun.

2. Results

Prince Rupert, Northern BC

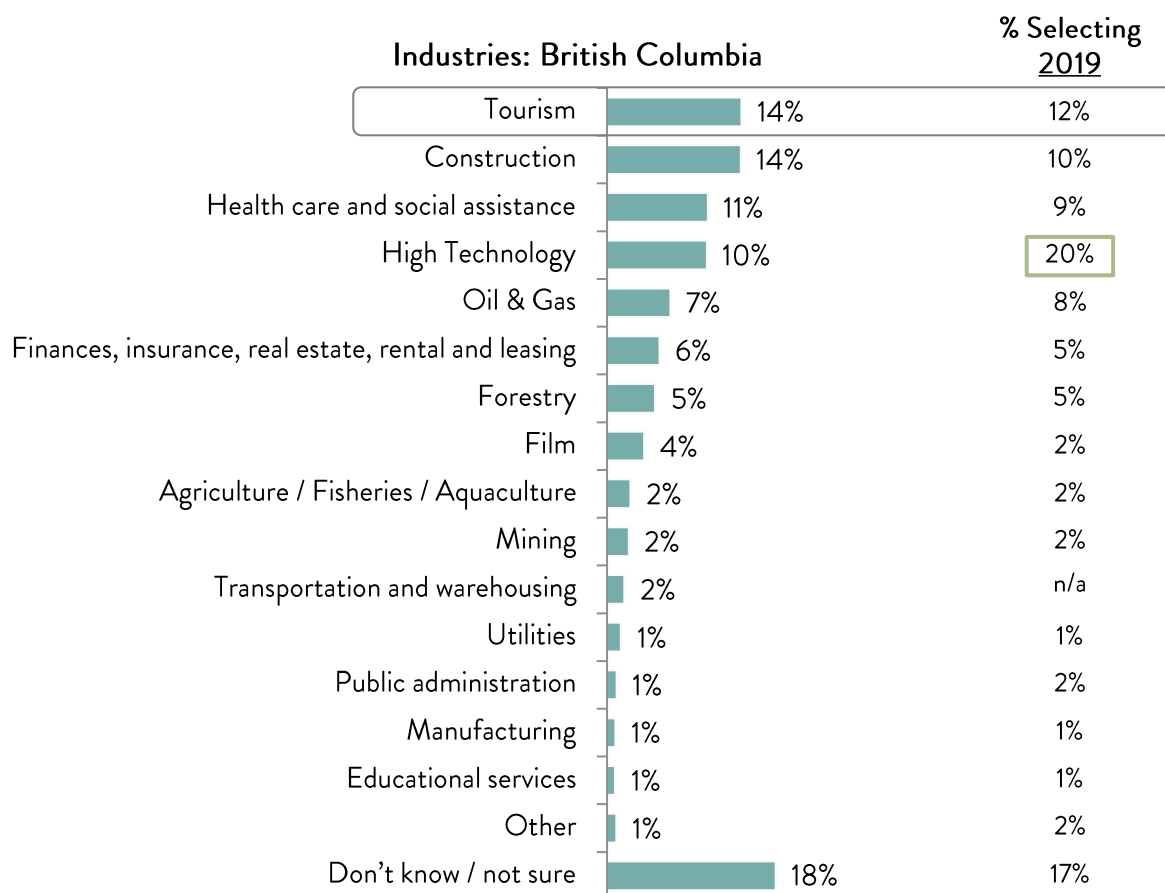
Perceived industry importance during next five years



Perceived industry importance during the next five years



- Tourism and construction are expected to be the largest contributor of new jobs and economic activity in British Columbia during the next five years. The importance of high technology has dropped substantially from 20% in 2019 to 10% in 2022.



Q3: In your opinion, which one industry will be the largest contributor of new jobs and economic activity in British Columbia and your community during the next five years? (Please select one) 2022 n=3,806, 2019 n=1,500

Note: n/a reflects that this statement was not asked in 2019

Perceived industry importance during the next five years



- Those in Northern BC anticipate oil and gas to contribute more than tourism or construction in creating new jobs and economic activity in BC in the next five years.

Industries: British Columbia

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Tourism	14%	15%	14%	6%	12%	16%	19%
Construction	14%	16%	14%	10%	24%	15%	8%
Health care and social assistance	11%	10%	10%	12%	0%	11%	14%
High Technology	10%	7%	13%	6%	1%	9%	8%
Oil & Gas	7%	8%	5%	21%	11%	7%	4%
Finances, insurance, real estate, rental and leasing	6%	6%	6%	3%	0%	5%	1%
Forestry	5%	8%	4%	6%	6%	4%	7%
Film	4%	2%	5%	1%	1%	3%	2%
Agriculture / Fisheries / Aquaculture	2%	2%	2%	3%	8%	3%	3%
Mining	2%	1%	2%	6%	6%	2%	7%
Transportation and warehousing	2%	0%	3%	3%	0%	1%	1%
Utilities	1%	1%	1%	0%	5%	4%	0%
Public administration	1%	1%	1%	0%	1%	1%	1%
Manufacturing	1%	0%	1%	3%	0%	1%	1%
Educational services	1%	0%	1%	0%	0%	0%	0%
Other	1%	2%	1%	0%	0%	1%	1%
Don't know / not sure	18%	21%	17%	19%	25%	16%	22%

Q3: In your opinion, which one industry will be the largest contributor of new jobs and economic activity in British Columbia and your community during the next five years? (Please select one)
2022 n=3,806

*Please interpret with caution due to low sample size.

Perceived industry importance during the next five years



- All ages and lengths of BC residency feel that tourism or construction will contribute the most to creating new jobs and economic activity in BC in the next five years.

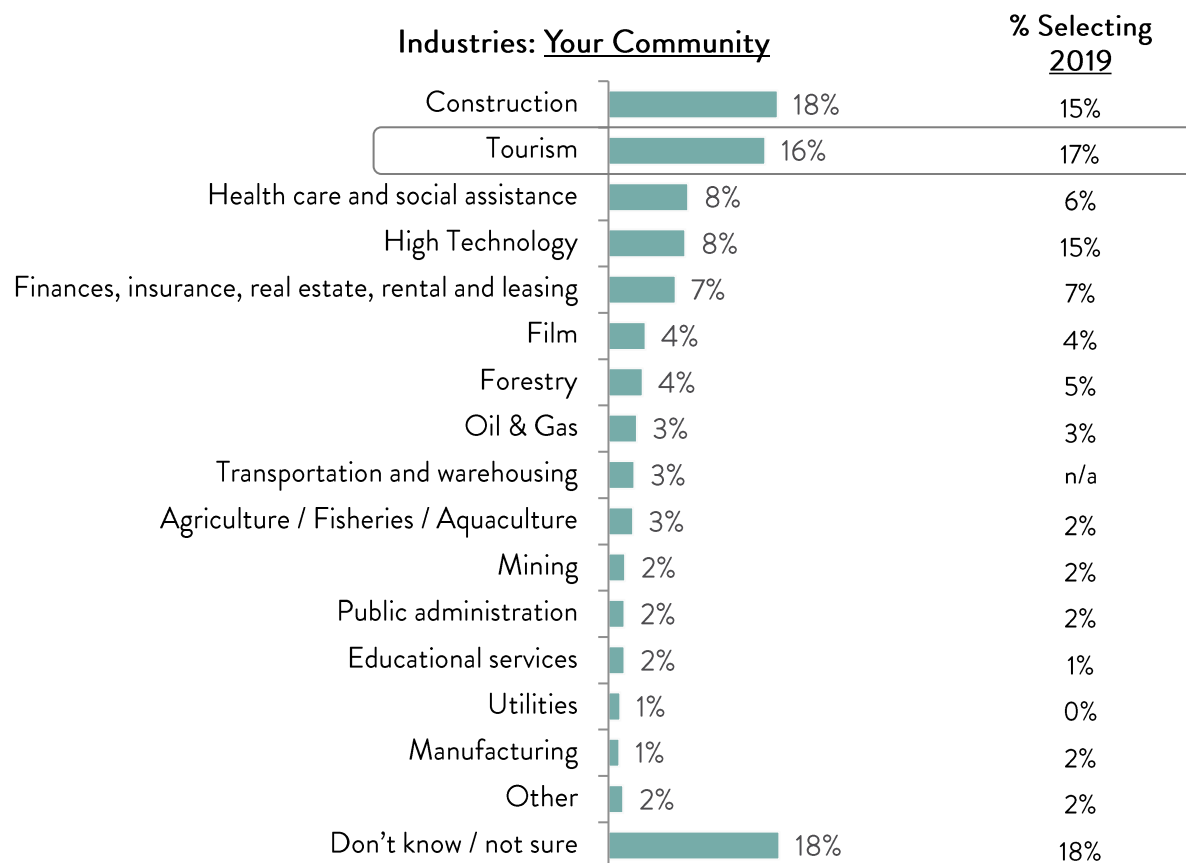
Industries: British Columbia

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2,276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Tourism	14%	11%	12%	17%	16%	12%	14%
Construction	14%	9%	16%	16%	9%	15%	14%
Health care and social assistance	11%	12%	10%	11%	11%	10%	11%
High Technology	10%	12%	10%	10%	15%	13%	10%
Oil & Gas	7%	5%	7%	7%	4%	6%	7%
Finances, insurance, real estate, rental and leasing	6%	7%	6%	4%	8%	7%	5%
Forestry	5%	5%	6%	5%	6%	6%	5%
Film	4%	5%	4%	3%	3%	5%	4%
Agriculture / Fisheries / Aquaculture	2%	3%	2%	3%	3%	3%	2%
Mining	2%	3%	1%	2%	3%	3%	2%
Transportation and warehousing	2%	2%	2%	2%	2%	1%	2%
Utilities	1%	2%	1%	1%	3%	1%	1%
Public administration	1%	1%	1%	1%	2%	1%	1%
Manufacturing	1%	1%	1%	1%	2%	1%	1%
Educational services	1%	2%	1%	0%	2%	0%	1%
Other	1%	0%	2%	1%	2%	2%	1%
Don't know / not sure	18%	20%	18%	16%	8%	12%	19%

Perceived industry importance during the next five years



- Residents believe the construction industry will be the largest contributor (18%) of new jobs and economic activity in their community over the next five years, with tourism a close second.
- High technology has dropped removing the industry as a front runner of leading contributors to economic activity in the community.



Q3: In your opinion, which one industry will be the largest contributor of new jobs and economic activity in British Columbia and your community during the next five years? (Please select one)

2022 n=3,806, 2019 n=1,500

Note: n/a reflects that this statement was not asked in 2019

Perceived industry importance during the next five years



- More residents in the Vancouver Island (25%) and Kootenay Rockies (27%) regions believe tourism will be the largest contributor of new jobs and economic activity in their communities in the next five years. Fewer in Northern BC (4%) feel this way.
- Residents of Northern BC and Cariboo Chilcotin Coast* are much more likely to select other industries, such as forestry, oil and gas, and mining as the largest contributors of new jobs and economic activity in their community over the next five years.

Industries: Your Community

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Construction	18%	22%	18%	7%	10%	19%	14%
Tourism	16%	25%	12%	4%	11%	25%	27%
Health care and social assistance	8%	6%	10%	6%	1%	7%	9%
High Technology	8%	5%	10%	1%	0%	8%	1%
Finances, insurance, real estate, rental and leasing	7%	3%	9%	2%	0%	6%	2%
Film	4%	2%	6%	1%	0%	2%	0%
Forestry	4%	4%	1%	18%	33%	3%	10%
Oil & Gas	3%	2%	1%	25%	0%	3%	0%
Transportation and warehousing	3%	2%	3%	6%	0%	1%	3%
Agriculture / Fisheries / Aquaculture	3%	3%	2%	1%	1%	5%	2%
Mining	2%	0%	1%	3%	26%	2%	12%
Public administration	2%	2%	2%	0%	0%	1%	0%
Educational services	2%	2%	2%	1%	0%	1%	0%
Utilities	1%	1%	1%	2%	0%	1%	1%
Manufacturing	1%	0%	1%	2%	0%	1%	1%
Other	2%	1%	1%	3%	0%	1%	1%
Don't know / not sure	18%	19%	20%	16%	17%	13%	14%

Q3: In your opinion, which one industry will be the largest contributor of new jobs and economic activity in British Columbia and your community during the next five years? (Please select one)

*Please interpret with caution due to low sample size.

Perceived industry importance during the next five years



- Residents who have lived in BC for five years or less is the group with the highest proportion (18%) of those who believe the tourism industry will be the largest contributor of new jobs and economic activity in their communities over the next five years.

Industries: Your Community

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2,276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Construction	18%	13%	18%	21%	13%	17%	18%
Tourism	16%	12%	16%	20%	18%	17%	16%
Health care and social assistance	8%	9%	8%	8%	12%	8%	8%
High Technology	8%	10%	8%	7%	11%	11%	7%
Finances, insurance, real estate, rental and leasing	7%	9%	7%	6%	8%	6%	7%
Film	4%	4%	4%	4%	4%	3%	4%
Forestry	4%	3%	3%	4%	1%	3%	4%
Oil & Gas	3%	4%	3%	2%	2%	2%	3%
Transportation and warehousing	3%	3%	3%	2%	2%	4%	3%
Agriculture / Fisheries / Aquaculture	3%	2%	2%	4%	1%	4%	2%
Mining	2%	2%	2%	2%	3%	1%	2%
Public administration	2%	2%	2%	1%	4%	2%	1%
Educational services	2%	3%	1%	1%	4%	2%	1%
Utilities	1%	3%	1%	0%	4%	1%	1%
Manufacturing	1%	1%	1%	1%	2%	2%	1%
Other	2%	1%	2%	1%	1%	2%	2%
Don't know / not sure	18%	20%	19%	16%	10%	13%	19%

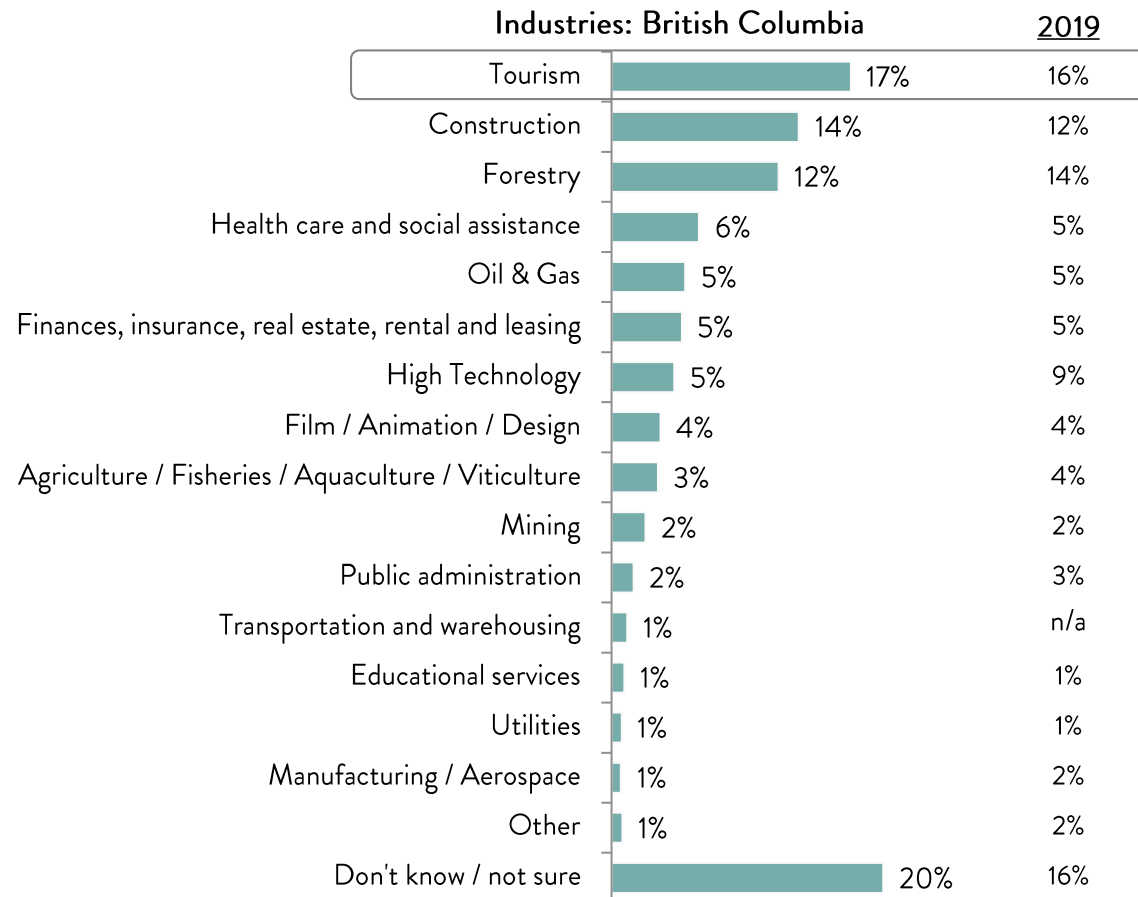
Perceived industry importance before COVID-19



Perceived industry importance pre-COVID-19



- The highest proportion of BC residents perceive tourism to have been the largest contributor to new jobs and to British Columbia's economy before COVID-19, followed by construction and forestry.



2022 question wording - Q2: In your opinion, which one industry was the largest contributor of new jobs and economic activity in British Columbia and your community before the COVID-19 pandemic? 2022 n=3,806

2019 wording - Q2. The following represent a list of industries which contribute to British Columbia's economy. In your opinion, which one industry is the largest contributor of new jobs and economic activity in British Columbia? (Please select one) 2019 n=1,500

Note: n/a reflects that this statement was not asked in 2019

Perceived industry importance pre-COVID-19



- The highest proportion of residents in nearly all regions perceive tourism to have been the largest contributor of new jobs and economic activity in British Columbia before COVID-19. Forestry was seen as the highest economic contributor by Kootenay Rockies residents.
- Northern BC residents chose the oil & gas industry as having had the largest economic impact on the province, compared to residents from other regions.

Industries: British Columbia

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Tourism	17%	18%	17%	12%	18%	19%	14%
Construction	14%	17%	12%	9%	18%	16%	7%
Forestry	12%	16%	11%	9%	12%	12%	16%
Health care and social assistance	6%	6%	7%	5%	1%	5%	6%
Oil & Gas	5%	5%	4%	22%	5%	5%	9%
Finances, insurance, real estate, rental and leasing	5%	4%	5%	2%	6%	7%	3%
High Technology	5%	3%	6%	3%	1%	4%	3%
Film	4%	1%	5%	2%	4%	2%	2%
Agriculture / Aquaculture	3%	3%	3%	3%	8%	5%	3%
Mining	2%	1%	2%	5%	10%	3%	3%
Public administration	2%	2%	2%	1%	3%	1%	2%
Transportation and warehousing	1%	0%	2%	0%	0%	1%	1%
Educational services	1%	1%	1%	0%	3%	1%	0%
Utilities	1%	1%	1%	1%	0%	1%	0%
Manufacturing	1%	0%	1%	0%	0%	1%	0%
Other	1%	1%	1%	2%	0%	0%	1%
Don't know / not sure	20%	21%	20%	24%	12%	16%	28%

Q2: In your opinion, which one industry was the largest contributor of new jobs and economic activity in British Columbia and your community before the COVID-19 pandemic? 2022 n=3,806

*Please interpret with caution due to low sample size.

Perceived industry importance pre-COVID-19



- Across all age groups, and lengths of BC residency, tourism is seen as having been the largest contributor of new jobs and economic activity in British Columbia before COVID-19.

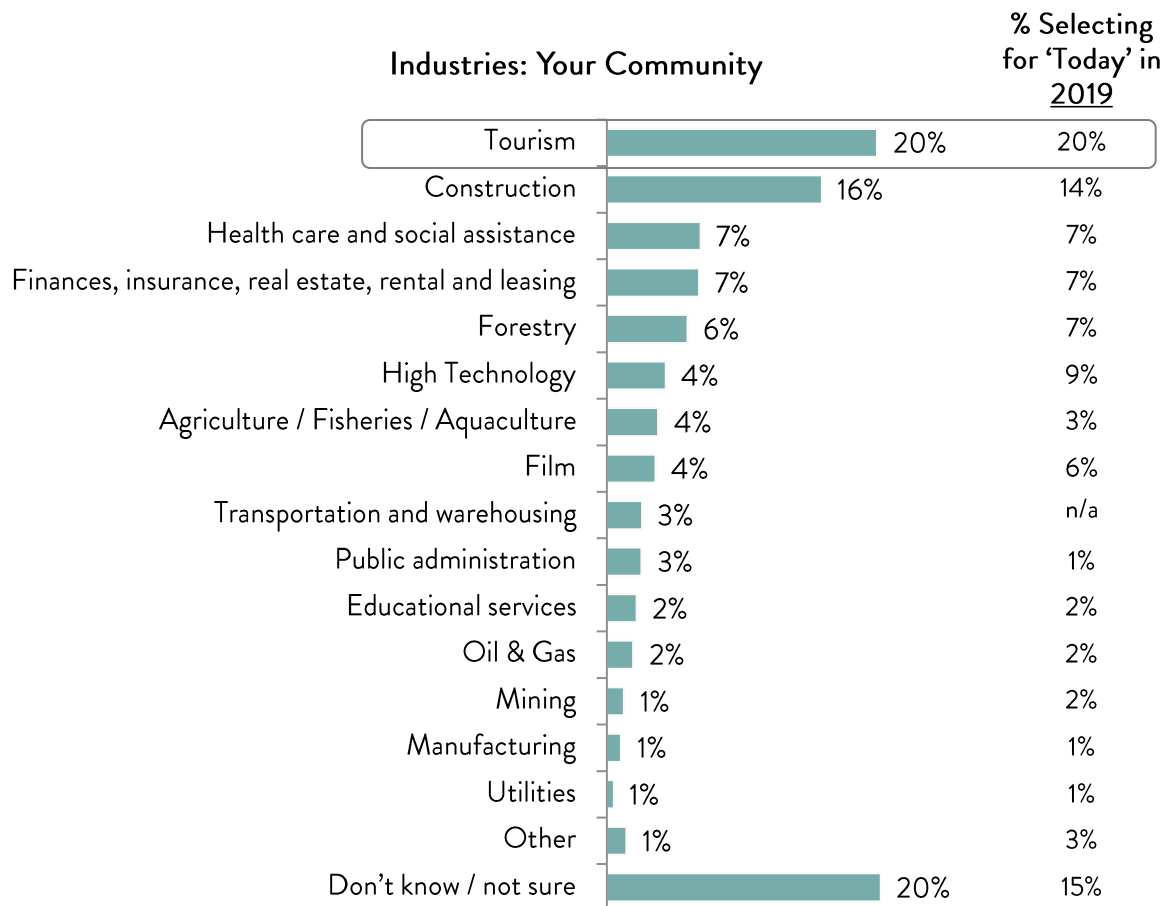
Industries: British Columbia

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2,276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Tourism	17%	14%	18%	19%	20%	18%	17%
Construction	14%	9%	16%	15%	9%	10%	15%
Forestry	12%	10%	12%	14%	8%	13%	13%
Health care and social assistance	6%	8%	6%	6%	8%	9%	6%
Oil & Gas	5%	6%	5%	5%	1%	5%	6%
Finances, insurance, real estate, rental and leasing	5%	8%	4%	4%	7%	5%	5%
High Technology	5%	5%	4%	5%	5%	6%	4%
Film	4%	4%	4%	3%	2%	6%	3%
Agriculture / Aquaculture	3%	6%	2%	3%	7%	2%	3%
Mining	2%	3%	2%	3%	4%	3%	2%
Public administration	2%	2%	1%	2%	2%	3%	1%
Transportation and warehousing	1%	2%	1%	1%	2%	1%	1%
Educational services	1%	1%	1%	1%	2%	1%	1%
Utilities	1%	1%	1%	1%	0%	0%	1%
Manufacturing	1%	1%	1%	1%	2%	2%	0%
Other	1%	0%	1%	1%	2%	1%	1%
Don't know / not sure	20%	22%	20%	18%	18%	15%	21%

Perceived industry importance pre-COVID-19



- Similar to 2019, tourism and construction are seen as having been the top two industries that had the largest impact on new jobs and economic activity, in their own community, before COVID-19.



2022 question wording - Q2c1: In your opinion, which one industry was the largest contributor of new jobs and economic activity in British Columbia and your community before the COVID-19 pandemic?

2022 n=3,806

2019 question wording - Q2. The following represent a list of industries which contribute to British Columbia's economy. In your opinion, which one industry is the largest contributor of new jobs and economic activity in your community? (Please select one) 2019 n=1,500

Note: n/a reflects that this statement was not asked in 2019

Perceived industry importance pre-COVID-19



- Residents of the Thompson Okanagan (37%), Kootenay Rockies (29%), and Vancouver Island (28%) are the most likely to say the tourism industry was the largest economic contributor to their community before COVID-19.
- Higher proportions of residents in Northern BC and the Cariboo Chilcotin Coast* feel that the forestry industry was the largest economic contributor to their community before COVID-19.

Industries: Your Community

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Tourism	20%	28%	13%	5%	8%	37%	29%
Construction	16%	16%	18%	7%	3%	14%	6%
Health care and social assistance	7%	6%	8%	3%	0%	7%	5%
Finances, insurance, real estate, rental and leasing	7%	3%	10%	0%	0%	4%	1%
Forestry	6%	8%	1%	35%	56%	5%	18%
High Technology	4%	4%	6%	1%	0%	2%	0%
Agriculture / Fisheries / Aquaculture	4%	4%	3%	4%	3%	7%	2%
Film	4%	1%	6%	0%	0%	1%	0%
Transportation and warehousing	3%	1%	3%	4%	0%	1%	1%
Public administration	3%	6%	2%	0%	0%	1%	2%
Educational services	2%	3%	2%	2%	0%	2%	2%
Oil & Gas	2%	1%	1%	18%	0%	1%	0%
Mining	1%	0%	0%	1%	24%	2%	10%
Manufacturing	1%	0%	1%	1%	0%	2%	1%
Utilities	1%	0%	1%	1%	0%	0%	0%
Other	1%	1%	2%	1%	0%	1%	2%
Don't know / not sure	20%	18%	24%	18%	6%	12%	20%

Q2b. The following represent a list of industries which contribute to British Columbia's economy. In your opinion, which one industry is the largest contributor of new jobs and economic activity in your community?
(Please select one) 2022 n=3,806

*Please interpret with caution due to low sample size.

Perceived industry importance pre-COVID-19



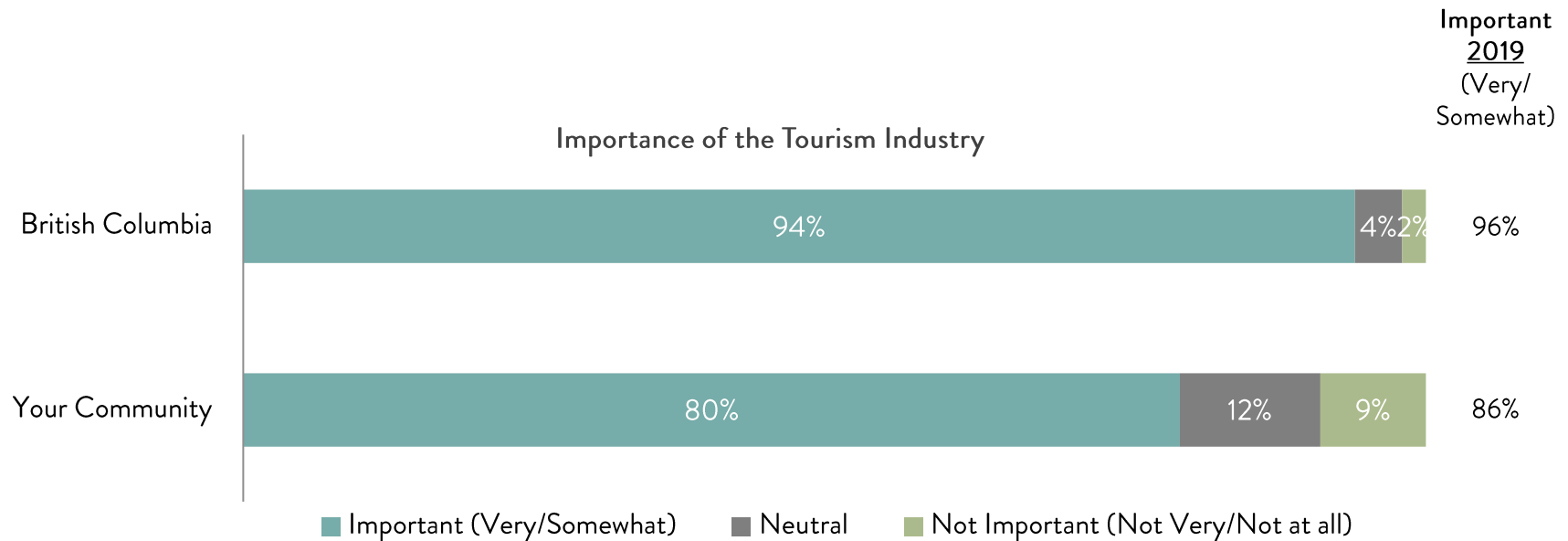
- Tourism also has the highest proportion, across all age groups and lengths of BC residency, of those selecting it as having been the largest contributor of new jobs and economic activity to their local community before COVID-19.

Industries: <u>Your Community</u>							
AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Tourism	20%	17%	19%	22%	23%	27%	18%
Construction	16%	13%	16%	17%	13%	13%	16%
Health care and social assistance	7%	7%	9%	5%	9%	8%	7%
Finances, insurance, real estate, rental and leasing	7%	9%	6%	6%	9%	7%	7%
Forestry	6%	6%	5%	7%	4%	3%	7%
High Technology	4%	4%	4%	5%	3%	4%	4%
Agriculture / Fisheries / Aquaculture	4%	3%	3%	5%	3%	3%	4%
Film	4%	4%	4%	3%	3%	3%	4%
Transportation and warehousing	3%	3%	3%	2%	2%	4%	2%
Public administration	3%	3%	2%	2%	3%	5%	2%
Educational services	2%	1%	3%	2%	1%	2%	2%
Oil & Gas	2%	3%	2%	1%	1%	3%	2%
Mining	1%	1%	2%	1%	1%	0%	1%
Manufacturing	1%	2%	1%	1%	4%	1%	1%
Utilities	1%	1%	0%	1%	1%	0%	0%
Other	1%	1%	2%	2%	2%	1%	2%
Don't know / not sure	20%	23%	20%	18%	18%	16%	21%

Tourism industry is important to the economic well-being of BC



- Almost all British Columbians perceive tourism as important to British Columbia's economy (94%), consistent with the past two years.
- 80% of BC residents also feel tourism is important at the community level.



Q4a. In your opinion, how important is the tourism industry to British Columbia's economy and your community's economy? British Columbia
Q4b. In your opinion, how important is the tourism industry to British Columbia's economy and your community's economy? Your community
n=3,774 and 3,775 respectively (rebased excluding Don't know / not sure responses)

Importance of the tourism industry in BC



- BC's tourism regions perceive the importance of the tourism industry to BC's economy, similarly.

Importance of the Tourism Industry: British Columbia

TOTAL IMPORTANT (Very important + Somewhat important)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
British Columbia	94%	95%	93%	97%	99%	93%	93%

TOTAL IMPORTANT (Very important + Somewhat important)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
British Columbia	94%	86%	94%	98%	91%	93%	94%

Q4a. In your opinion, how important is the tourism industry to British Columbia's economy and your community's economy? British Columbia
n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Importance of the tourism industry in your community



- Residents of Vancouver, Coast & Mountains (74%) , Northern BC (72%), and Cariboo Chilcotin Coast* (73%) regions are less inclined to feel tourism is important to their community's economy, compared to those in the Thompson Okanagan (92%).

Importance of the Tourism Industry: Your Community

TOTAL IMPORTANT (Very important + Somewhat important)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Your Community	80%	87%	74%	72%	73%	92%	86%

TOTAL IMPORTANT (Very important + Somewhat important)	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Your Community	80%	72%	82%	83%	82%	82%	79%

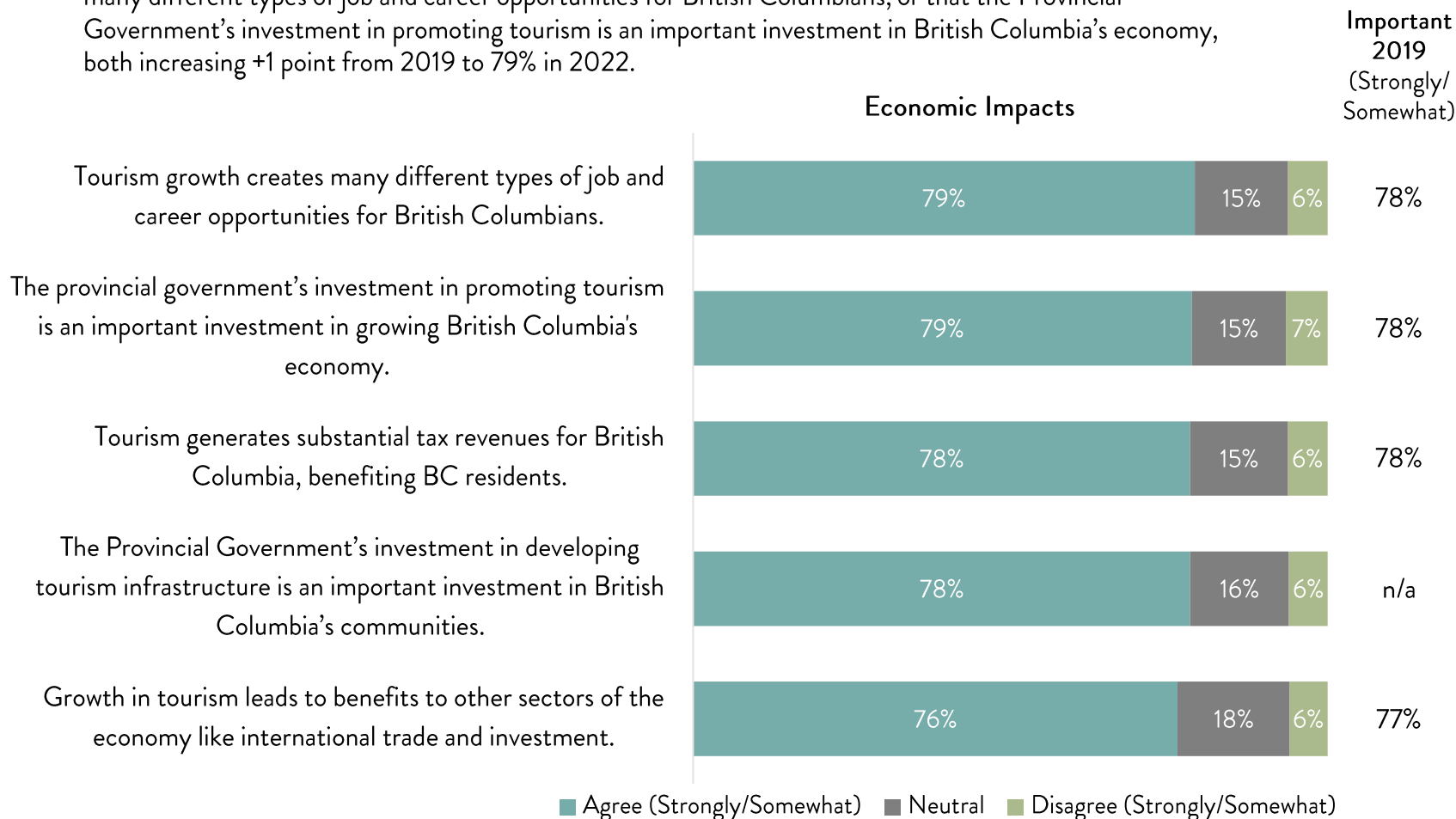
Q4b. In your opinion, how important is the tourism industry to British Columbia's economy and your community's economy? Your community
n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Perceptions of economic impact of tourism



- There has been little change from 2019 in the percentage of residents that believe tourism growth creates many different types of job and career opportunities for British Columbians, or that the Provincial Government's investment in promoting tourism is an important investment in British Columbia's economy, both increasing +1 point from 2019 to 79% in 2022.

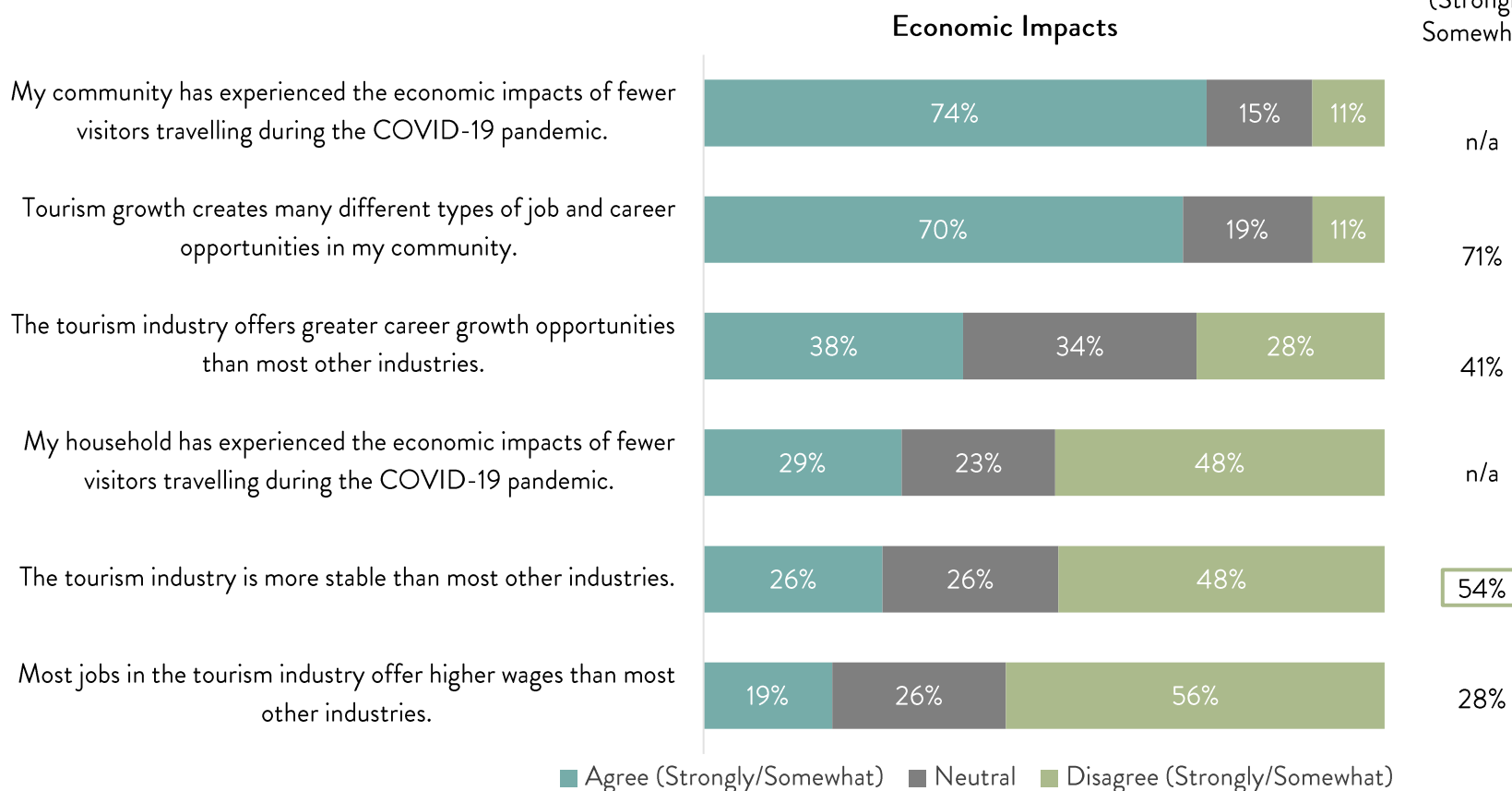


Perceptions of economic impact of tourism



- Likely due to the COVID-19 pandemic, far fewer agree that the tourism industry is more stable than most other industries (26% versus 54% in 2019).
- Agreement that jobs in the tourism industry offers higher wages than other industries has decreased (19% versus 28% in 2019).

**Important
2019**
(Strongly/
Somewhat)



Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording revised slightly in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

Note: n/a reflects that this statement was not asked in 2019. n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of economic impact of tourism



- Thompson Okanagan residents are most likely to believe that their community has experienced negative economic impacts of fewer travellers during COVID-19. Kootenay Rockies and Cariboo Chilcotin Coast* residents are less likely to believe that jobs in the tourism industry offer higher wages than most other industries.

AGREE (Strongly/Somewhat)	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Tourism growth creates many different types of job and career opportunities for British Columbians.	79%	81%	79%	78%	78%	77%	77%
The Provincial Government's investment in promoting tourism is an important investment in growing British Columbia's economy.	79%	83%	78%	70%	91%	78%	76%
Tourism generates substantial tax revenues for British Columbia, benefiting BC residents.	78%	77%	78%	81%	84%	80%	75%
The Provincial Government's investment in developing tourism infrastructure is an important investment in British Columbia's communities.	78%	80%	78%	83%	87%	77%	76%
Growth in tourism leads to benefits to other sectors of the economy like international trade and investment.	76%	77%	77%	80%	62%	73%	72%
My community has experienced the economic impacts of fewer visitors travelling during the COVID-19 pandemic.	74%	80%	68%	74%	74%	84%	83%
Tourism growth creates many different types of job and career opportunities in my community.	70%	77%	69%	61%	73%	71%	72%
The tourism industry offers greater career growth opportunities than most other industries.	38%	36%	42%	32%	13%	33%	30%
My household has experienced the economic impacts of fewer visitors travelling during the COVID-19 pandemic.	29%	27%	31%	29%	18%	28%	23%
The tourism industry is more stable than most other industries.	26%	23%	28%	21%	22%	25%	26%
Most jobs in the tourism industry offer higher wages than most other industries.	19%	12%	24%	16%	7%	14%	8%

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

Note: n/a reflects that this statement was not asked to that region. n=3,806 (rebased excluding Don't know / not sure responses) *Please interpret with caution due to low sample size.

Perceptions of economic impact of tourism



- BC residents aged 18-34 (29%) are less likely to agree that the Provincial Government's investment in promoting tourism is an important investment in growing British Columbia's economy, and more likely to agree that most jobs in the tourism industry offer higher wages than most other industries compared to those aged 55+ (11%).

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3152)
Tourism growth creates many different types of job and career opportunities for British Columbians.	79%	73%	80%	82%	75%	78%	80%
The Provincial Government's investment in promoting tourism is an important investment in growing British Columbia's economy.	79%	69%	79%	84%	75%	75%	80%
Tourism generates substantial tax revenues for British Columbia, benefiting BC residents.	78%	70%	77%	84%	76%	77%	79%
The Provincial Government's investment in developing tourism infrastructure is an important investment in British Columbia's communities.	78%	72%	77%	83%	79%	79%	78%
Growth in tourism leads to benefits to other sectors of the economy like international trade and investment.	76%	70%	78%	78%	72%	76%	77%
My community has experienced the economic impacts of fewer visitors travelling during the COVID-19 pandemic.	74%	66%	74%	78%	76%	74%	74%
Tourism growth creates many different types of job and career opportunities in my community.	70%	67%	72%	71%	70%	69%	71%
The tourism industry offers greater career growth opportunities than most other industries.	38%	41%	41%	34%	45%	40%	37%
My household has experienced the economic impacts of fewer visitors travelling during the COVID-19 pandemic.	29%	33%	32%	24%	31%	34%	28%
The tourism industry is more stable than most other industries.	26%	29%	25%	25%	30%	29%	26%
Most jobs in the tourism industry offer higher wages than most other industries.	19%	29%	22%	11%	26%	25%	17%

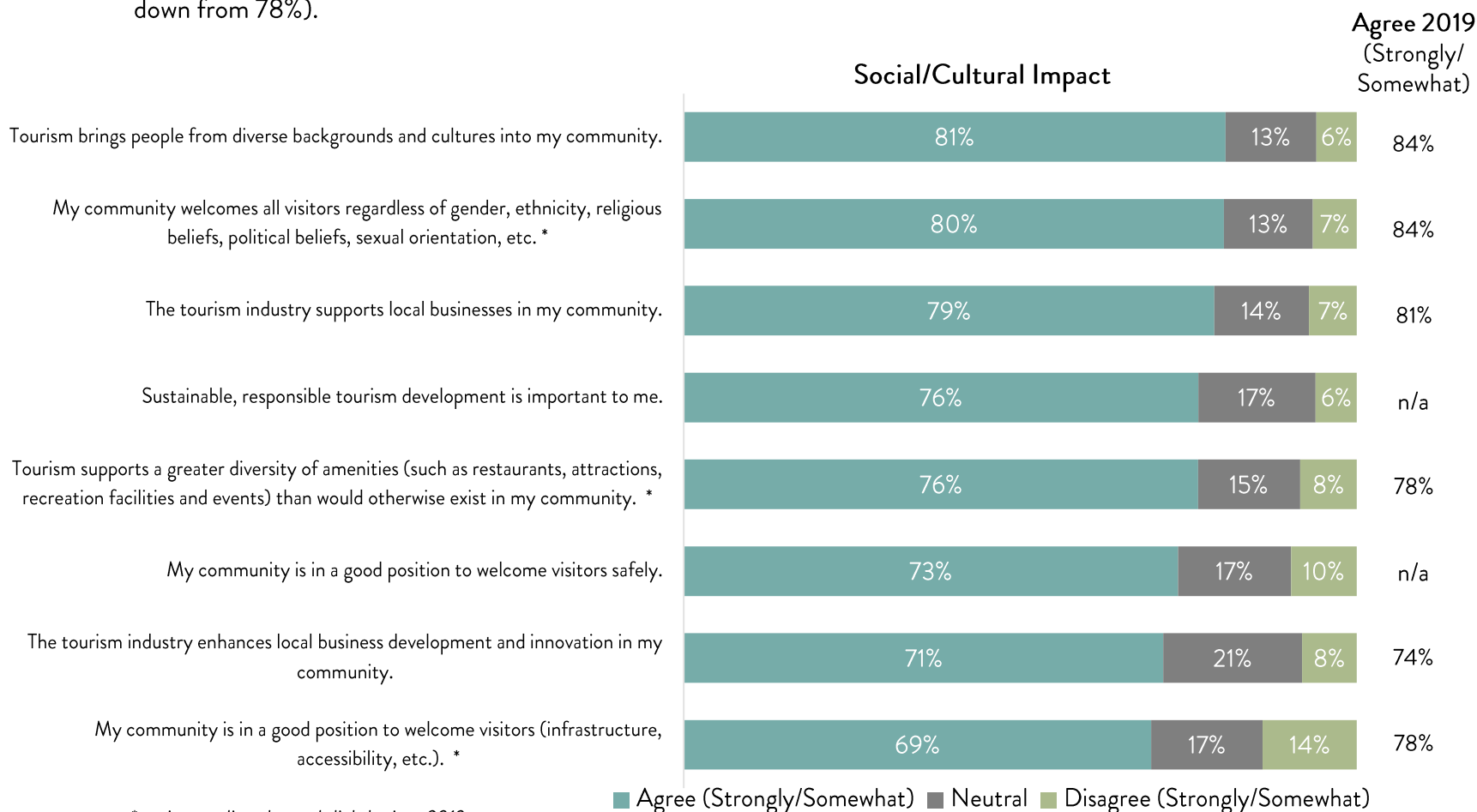
Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?" n=3,806 (rebased excluding Don't know / not sure responses) 30

Perceptions of social/cultural impacts of tourism



- Around eight in ten BC residents agree that tourism brings people from diverse backgrounds and cultures into their community, their community is welcoming to all visitors, and the tourism industry supports local business.
- There is a decrease from 2019 of those who feel that their community is in a good position to welcome visitors (69%, down from 78%).



Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

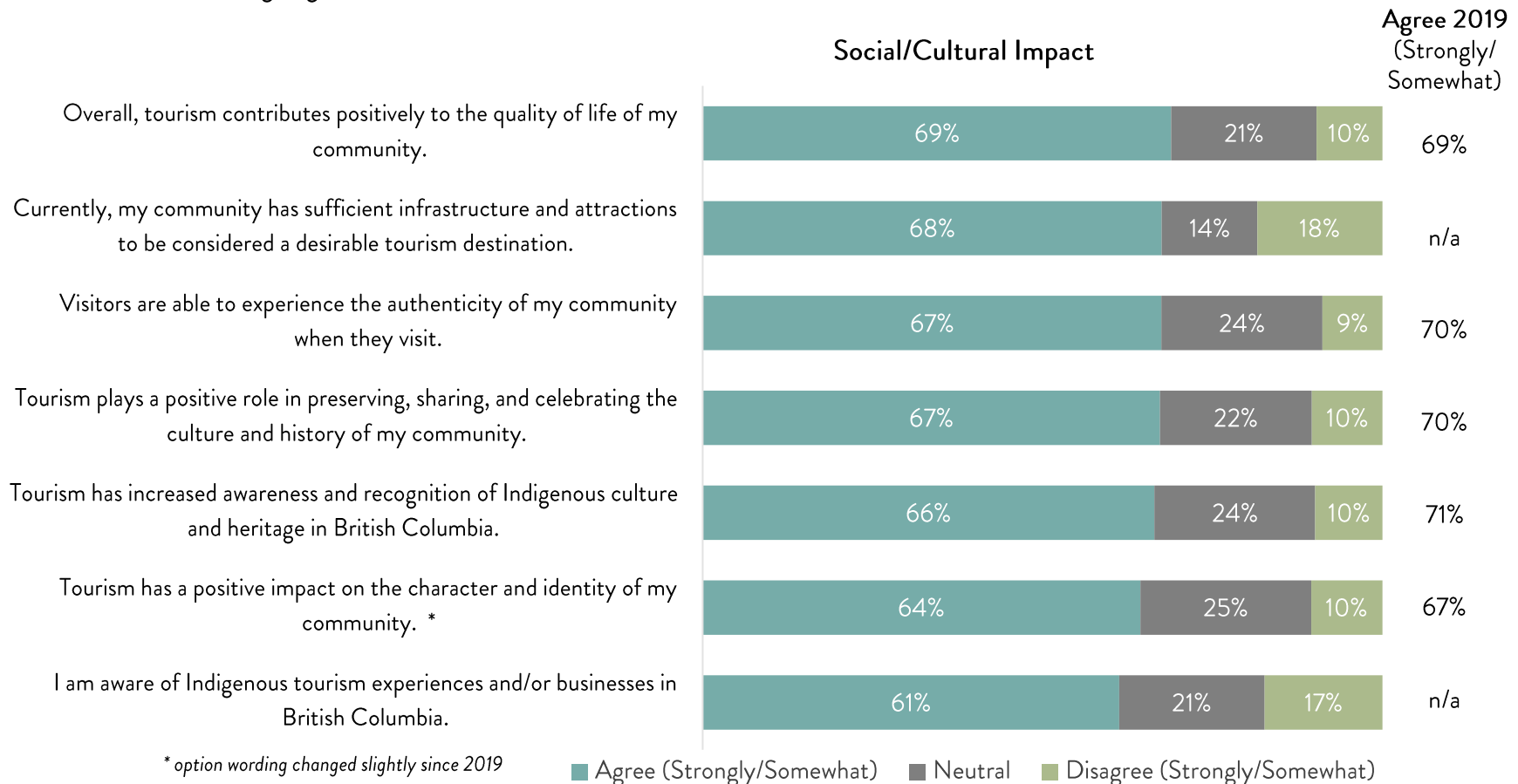
Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

Note: n/a reflects that this statement was not asked in 2019 n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of social/cultural impacts of tourism



- Close to seven in ten BC residents feel that overall, tourism contributes positively to the quality of life in their community. This is consistent with 2019 results.
- Two-thirds of respondents (66%) agree that tourism has increased awareness and recognition of Indigenous culture and heritage in BC, although agreement has declined from 2019 (71%).



Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

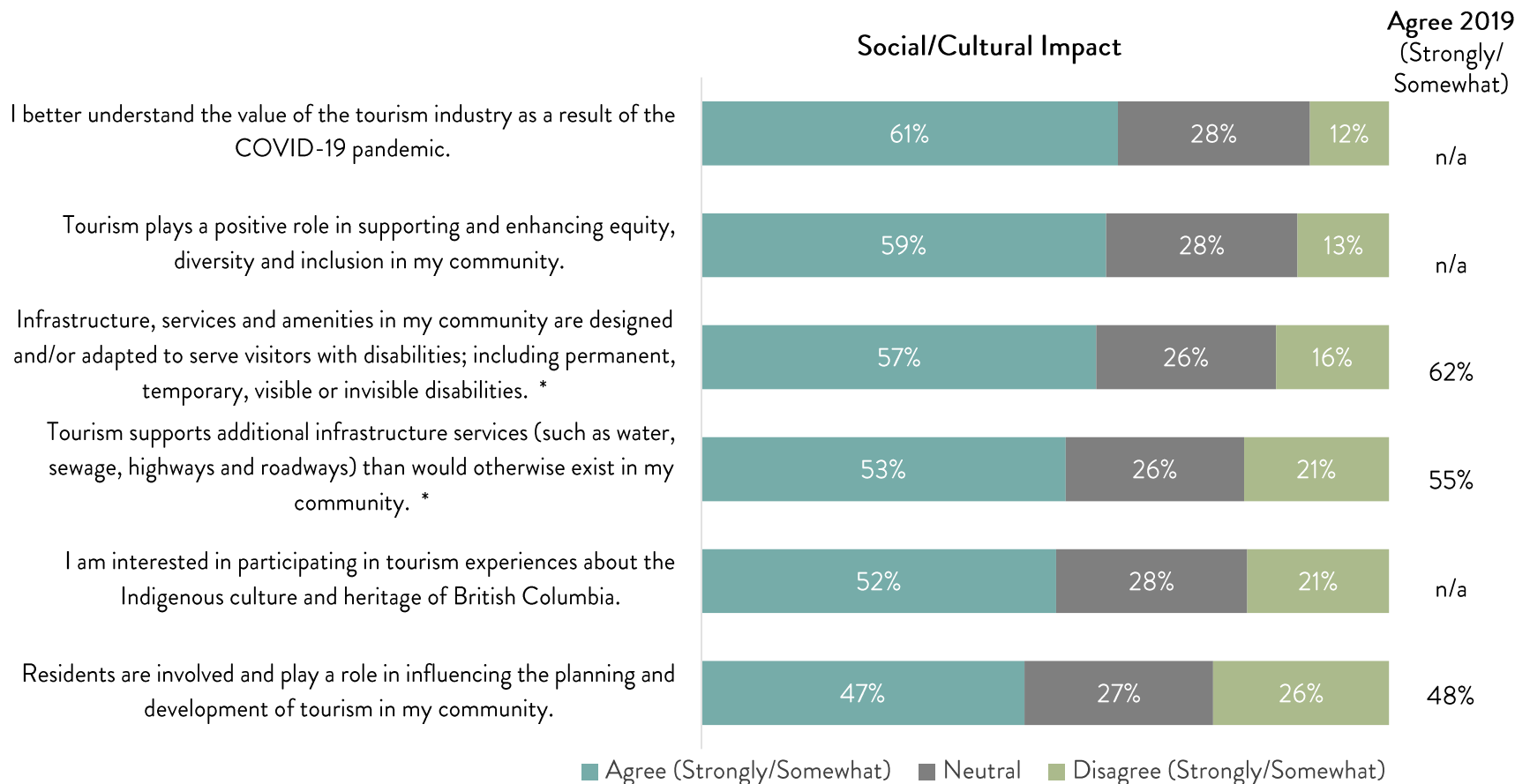
Note: n/a reflects that this statement was not asked in 2019

n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of social/cultural impacts of tourism



- As a result of the COVID-19 pandemic, six in ten BC residents feel that they can now better understand the value of the tourism industry.



* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

Note: n/a reflects that this statement was not asked in 2019

n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of social/cultural impacts of tourism



- Residents in Northern BC are less likely to agree that their community welcomes all visitors of all gender, ethnicity, religious beliefs, etc.
- Residents of Cariboo Chilcotin Coast* are less likely to believe that tourism brings people from diverse backgrounds into their community or that their community is in a good position to welcome visitors in respects to infrastructure/accessibility.

Social/Cultural Impact

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Tourism brings people from diverse backgrounds and cultures into my community.	81%	85%	79%	79%	70%	81%	79%
My community welcomes all visitors regardless of gender, ethnicity, religious beliefs, political beliefs, sexual orientation, etc. *	80%	84%	80%	69%	71%	82%	79%
The tourism industry supports local businesses in my community.	79%	88%	73%	77%	75%	88%	80%
Sustainable, responsible tourism development is important to me.	76%	n/a	n/a	n/a	n/a	76%	n/a
Tourism supports a greater diversity of amenities (such as restaurants, attractions, recreation facilities and events) than would otherwise exist in my community. *	76%	79%	75%	75%	70%	80%	77%
My community is in a good position to welcome visitors safely.	73%	74%	72%	75%	65%	75%	77%
The tourism industry enhances local business development and innovation in my community.	71%	78%	69%	67%	64%	73%	75%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.). *	69%	74%	68%	65%	58%	71%	69%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Perceptions of social/cultural impacts of tourism



- Residents of Vancouver Island are much more likely to be aware of Indigenous tourism experiences/businesses than residents from Northern BC or Cariboo Chilcotin Coast*.

Social/Cultural Impact

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Overall, tourism contributes positively to the quality of life of my community.	69%	72%	68%	67%	65%	70%	68%
Currently, my community has sufficient infrastructure and attractions to be considered a desirable tourism destination.	68%	n/a	n/a	n/a	n/a	68%	n/a
Visitors are able to experience the authenticity of my community when they visit.	67%	69%	67%	59%	56%	70%	71%
Tourism plays a positive role in preserving, sharing, and celebrating the culture and history of my community.	67%	69%	67%	62%	83%	68%	64%
Tourism has increased awareness and recognition of Indigenous culture and heritage in British Columbia. *	66%	70%	68%	68%	58%	60%	59%
Tourism has a positive impact on the character and identity of my community. *	64%	68%	62%	63%	73%	69%	63%
I am aware of Indigenous tourism experiences and/or businesses in British Columbia.	61%	72%	60%	51%	45%	61%	59%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Perceptions of social/cultural impacts of tourism



- Those living on the Cariboo Chilcotin Coast* are less inclined to agree that they better understand the value of tourism since the pandemic, that tourism plays a positive role in supporting and enhancing diversity in their community, that the infrastructure is designed to serve visitors with disabilities, or that they are interested in participating in tourism experiences about indigenous culture.
- Kootenay Rockies residents are less likely to agree that tourism supports additional infrastructure services.

Social/Cultural Impact

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
I better understand the value of the tourism industry as a result of the COVID-19 pandemic.	61%	63%	63%	53%	38%	57%	53%
Tourism plays a positive role in supporting and enhancing equity, diversity and inclusion in my community.	59%	61%	60%	54%	39%	56%	50%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities; including permanent, temporary, visible or invisible disabilities. *	57%	55%	60%	52%	44%	56%	49%
Tourism supports additional infrastructure services (such as water, sewage, highways and roadways) than would otherwise exist in my community. *	53%	49%	55%	52%	48%	53%	42%
I am interested in participating in tourism experiences about the Indigenous culture and heritage of British Columbia.	52%	57%	52%	43%	29%	49%	51%
Residents are involved and play a role in influencing the planning and development of tourism in my community.	47%	53%	46%	45%	39%	46%	44%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Perceptions of social/cultural impacts of tourism



- Compared to those aged 18-34, residents aged 35+ are more likely to feel that their community is welcoming to all visitors and that the tourism industry supports local businesses.
- Residents who have lived in BC for 5 years or less are less inclined to agree that sustainable, responsible tourism development is important to them.

Social/Cultural Impact

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3152)
Tourism brings people from diverse backgrounds and cultures into my community.	81%	78%	79%	83%	79%	79%	81%
My community welcomes all visitors regardless of gender, ethnicity, religious beliefs, political beliefs, sexual orientation, etc. *	80%	72%	80%	85%	76%	77%	81%
The tourism industry supports local businesses in my community.	79%	71%	81%	82%	81%	81%	79%
Tourism supports a greater diversity of amenities (such as restaurants, attractions, recreation facilities and events) than would otherwise exist in my community. *	76%	73%	79%	76%	79%	80%	76%
My community is in a good position to welcome visitors safely.	73%	66%	72%	79%	74%	71%	74%
The tourism industry enhances local business development and innovation in my community.	71%	69%	73%	71%	75%	72%	71%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.). *	69%	65%	70%	71%	69%	67%	70%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of social/cultural impacts of tourism



- Compared to residents who are 35+ years old, those aged 18-34 are less likely to say that they are aware of Indigenous tourism experiences/businesses in BC.

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Social/Cultural Impact					
		Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3152)
Overall, tourism contributes positively to the quality of life of my community.	69%	63%	71%	71%	70%	71%	69%
Visitors are able to experience the authenticity of my community when they visit.	67%	66%	67%	69%	65%	68%	68%
Tourism plays a positive role in preserving, sharing, and celebrating the culture and history of my community.	67%	66%	68%	67%	72%	64%	68%
Tourism has increased awareness and recognition of Indigenous culture and heritage in British Columbia. *	66%	59%	66%	71%	62%	66%	67%
Tourism has a positive impact on the character and identity of my community. *	64%	59%	66%	66%	63%	68%	64%
I am aware of Indigenous tourism experiences and/or businesses in British Columbia.	61%	52%	59%	69%	61%	61%	62%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of social/cultural impacts of tourism



- Residents who have lived in BC for less than 5 years are more likely to say they understand the value of the tourism industry as a result of the COVID-19 pandemic compared to those who have lived in the area for more than 15 years.

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Social/Cultural Impact					
		Age			How long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or less (n=216)	6 to 15 years (n=423)	More than 15 years (n=3152)
I better understand the value of the tourism industry as a result of the COVID-19 pandemic.	61%	63%	61%	59%	70%	64%	59%
Tourism plays a positive role in supporting and enhancing equity, diversity and inclusion in my community.	59%	57%	64%	56%	63%	58%	59%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities; including permanent, temporary, visible or invisible disabilities. *	57%	56%	59%	57%	60%	55%	58%
Tourism supports additional infrastructure services (such as water, sewage, highways and roadways) than would otherwise exist in my community. *	53%	59%	56%	47%	61%	55%	52%
I am interested in participating in tourism experiences about the Indigenous culture and heritage of British Columbia.	52%	54%	57%	46%	61%	55%	50%
Residents are involved and play a role in influencing the planning and development of tourism in my community.	47%	50%	50%	43%	49%	49%	46%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: Wording changed in 2019 from "To what degree do you agree or disagree with the following statements about British Columbia's tourism industry?"

n=3,806 (rebased excluding Don't know / not sure responses)

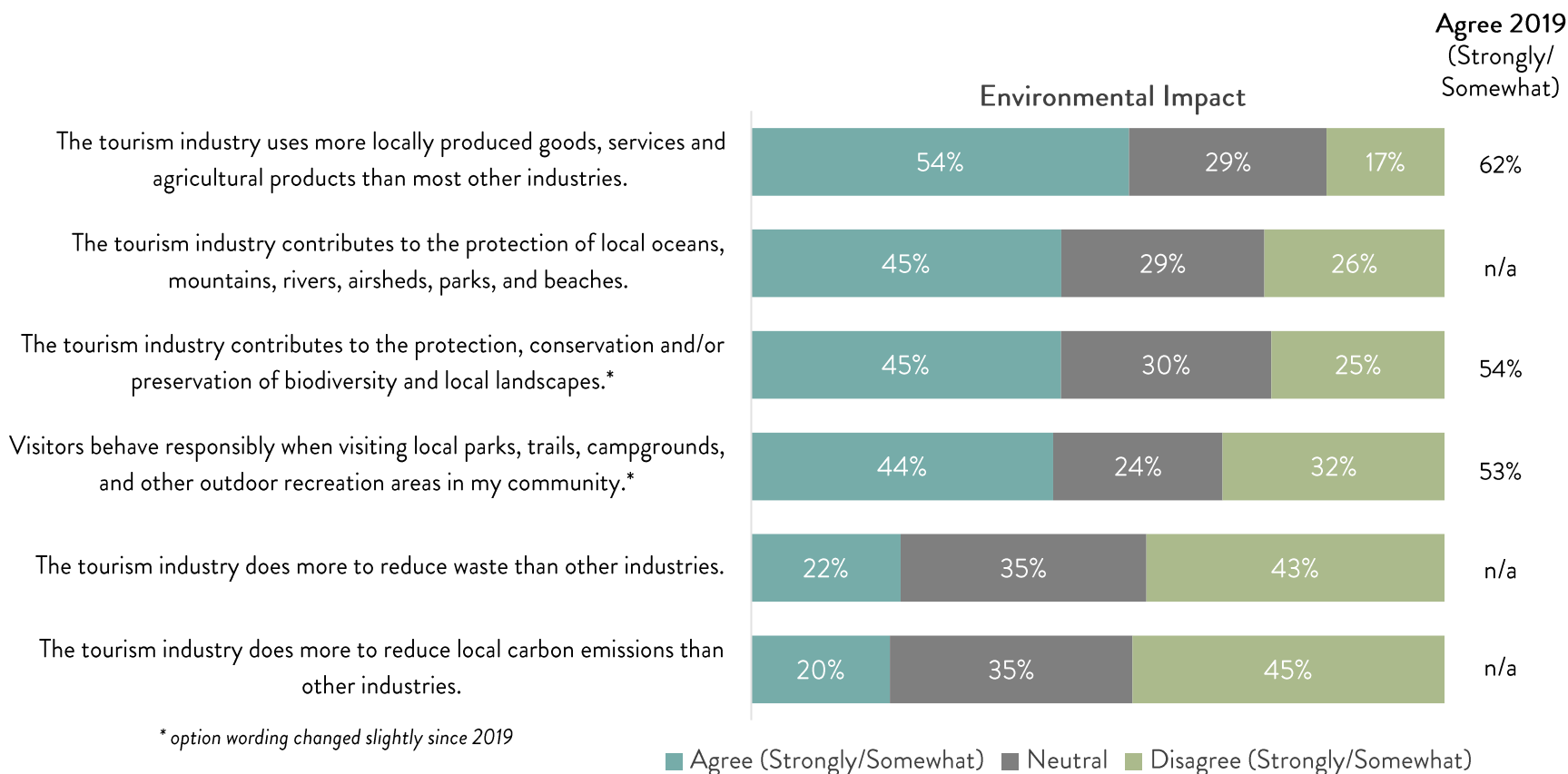
Perceived environmental impacts of tourism



Perceptions of environmental impacts of tourism



- Over half (54%) of BC residents believe that the tourism industry uses more locally produced goods, services and agricultural products than most other industries. This proportion has declined since 2019 (62% in 2019).
- Just under half of residents agree that tourism contributes positively to the protection and conservation of the local landscape (45%) and that visitors behave responsibly when visiting (44%), both down since last year (54% and 53% respectively).



Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?

Note: n/a reflects that this statement was not asked in 2019

n=3,806 (rebased excluding Don't know / not sure responses)

Perceptions of environmental impacts of tourism



- Residents from Thompson Okanagan are more likely to believe that the tourism industry uses more locally produced goods than other industries, whereas residents from Cariboo Chilcotin Coast* and Kootenay Rockies are less likely to believe so.

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Environmental Impact					
		Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
The tourism industry uses more locally produced goods, services and agricultural products than most other industries.	54%	56%	52%	51%	37%	64%	44%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches.	45%	45%	44%	48%	28%	46%	44%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes.*	45%	46%	45%	48%	37%	42%	44%
Visitors behave responsibly when visiting local parks, trails, campgrounds, and other outdoor recreation areas in my community.*	44%	43%	46%	43%	33%	39%	35%
The tourism industry does more to reduce waste than other industries.	22%	17%	25%	14%	4%	18%	14%
The tourism industry does more to reduce local carbon emissions than other industries.	20%	15%	24%	15%	11%	16%	11%

* option wording changed slightly since 2019

Q5. To what degree do you agree or disagree with the following statements about the tourism industry in British Columbia as a whole and in your community?
n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Perceptions of environmental impacts of tourism



- Residents who have lived in the province for less than five years are more likely to agree the tourism industry does more to reduce waste (33%) and local carbon emissions (30%) than other industries. Younger residents aged 18-34 also tend more to agree with these statements compared to other age groups (30% and 28% respectively.)

AGREE (Strongly/Somewhat)	TOTAL (n=3806)	Environmental Impact					
		Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3152)
The tourism industry uses more locally produced goods, services and agricultural products than most other industries.	54%	53%	54%	56%	58%	58%	53%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches.	45%	49%	44%	43%	51%	43%	44%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes.*	45%	46%	46%	42%	52%	43%	44%
Visitors behave responsibly when visiting local parks, trails, campgrounds, and other outdoor recreation areas in my community.*	44%	42%	44%	44%	46%	41%	44%
The tourism industry does more to reduce waste than other industries.	22%	30%	23%	15%	33%	25%	20%
The tourism industry does more to reduce local carbon emissions than other industries.	20%	28%	22%	14%	30%	25%	18%

* option wording changed slightly since 2019

Openness towards visitors

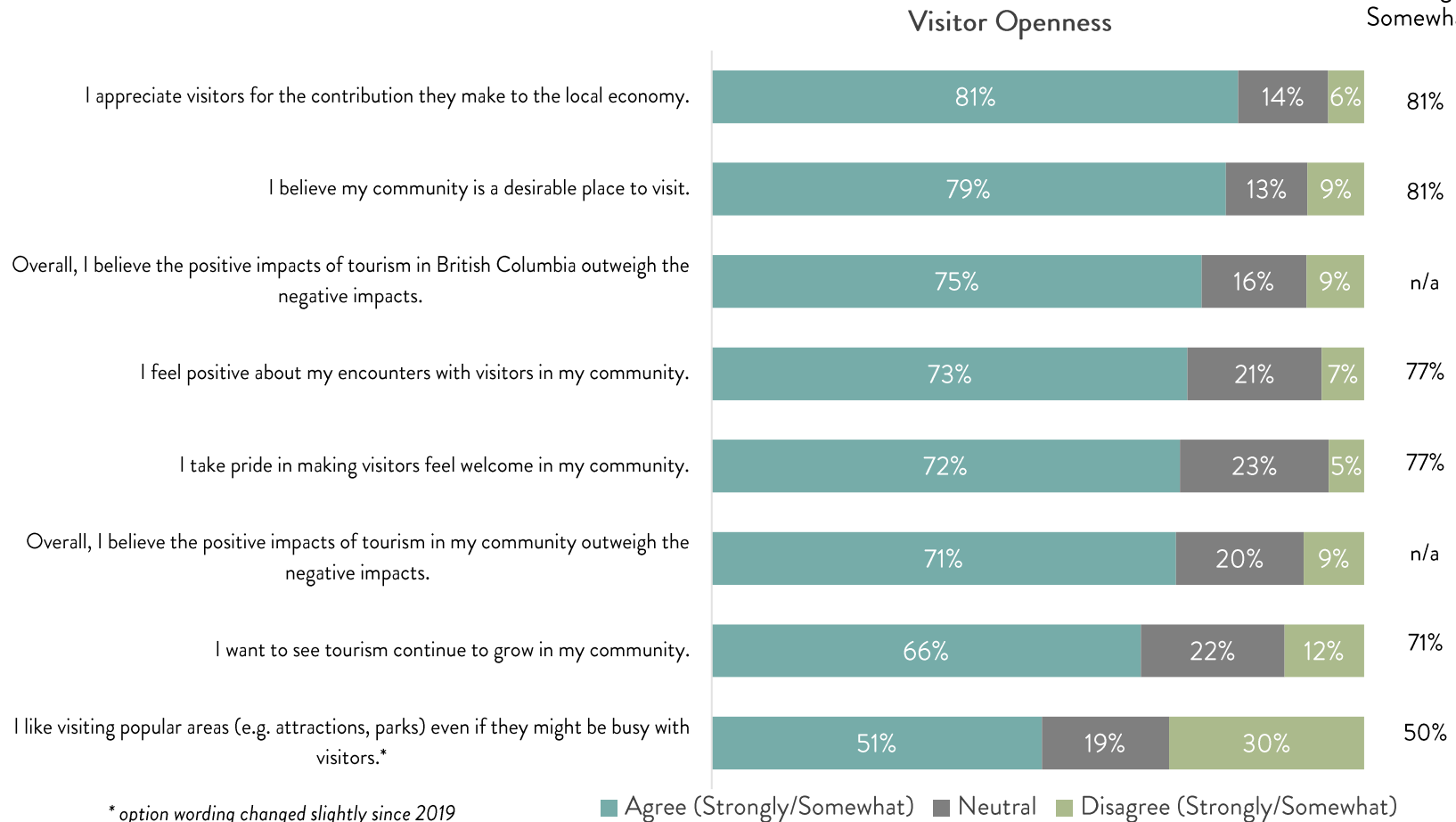


Visitor openness



- Most BC residents (81%) appreciate visitors for the contribution that they make to their local economy.
- Eight in ten (79%) agree their community is a desirable place to visit.
- Three in ten BC residents (30%) disagree with the statement of visiting popular areas even if they may be busy with visitors, whereas half (51%) indicate they like visiting them even if overcrowded.

Agree
2019
(Strongly/
Somewhat)



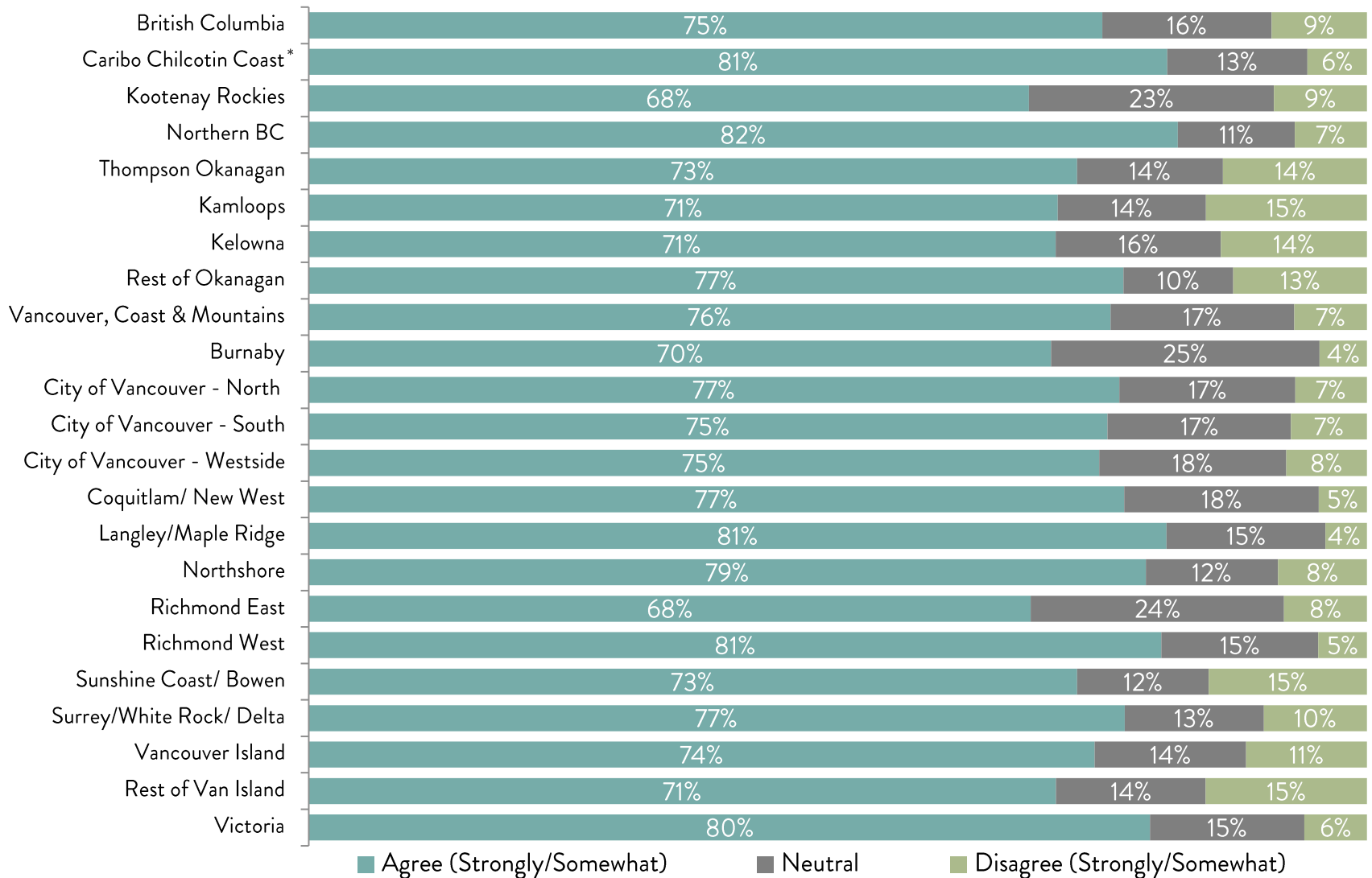
Q7: To what extent do you agree or disagree with each of the following statements?

Note: n/a reflects that this statement was not asked in 2019 n=3,806 (rebased excluding Don't know / not sure responses)

Overall tourism positivity– BC level



Overall, I believe the positive impacts of tourism in British Columbia outweigh the negative impacts



Q7: To what extent do you agree or disagree with each of the following statements?

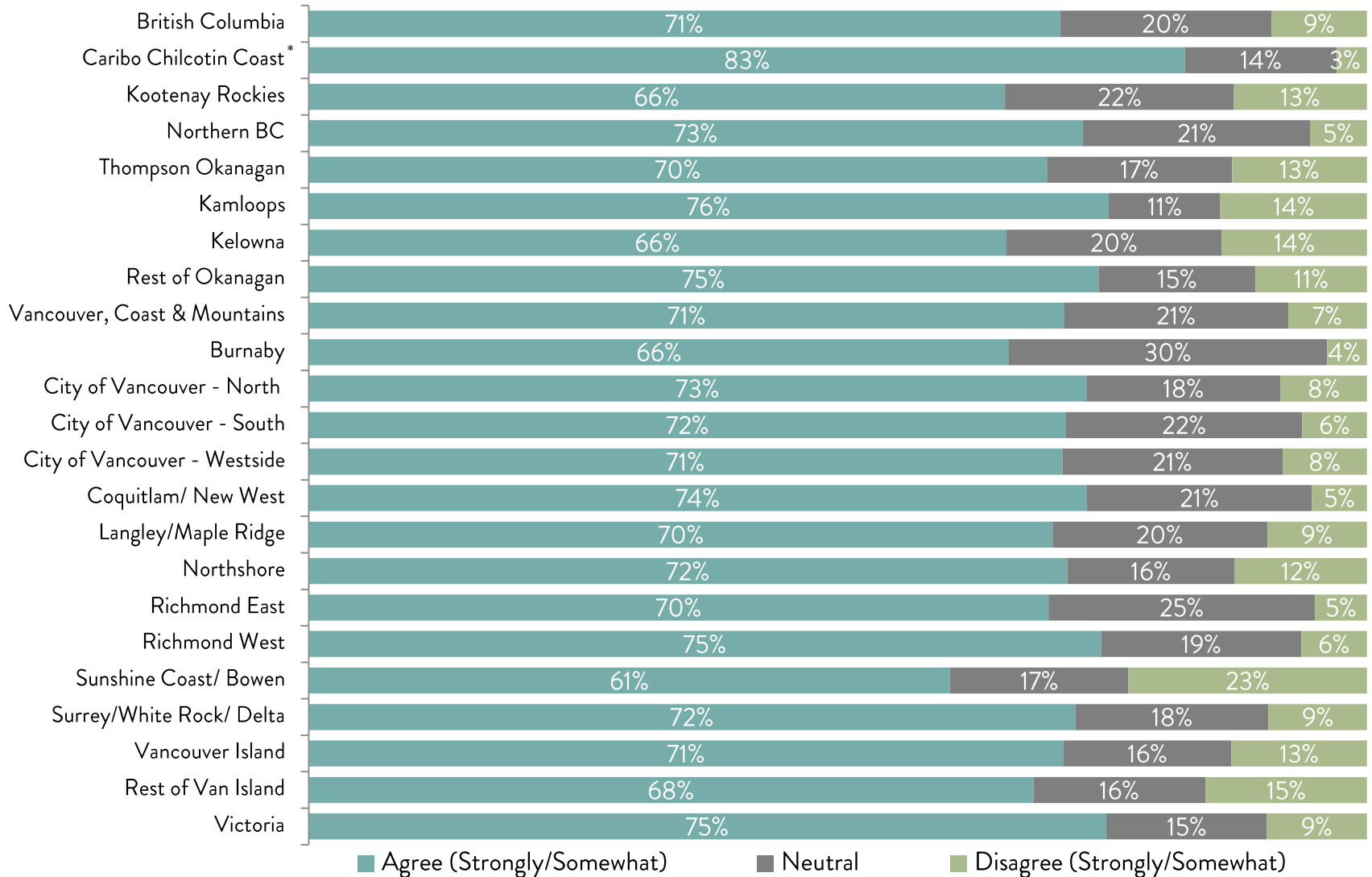
n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Overall tourism positivity – Community level



Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts



Q7: To what extent do you agree or disagree with each of the following statements?

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

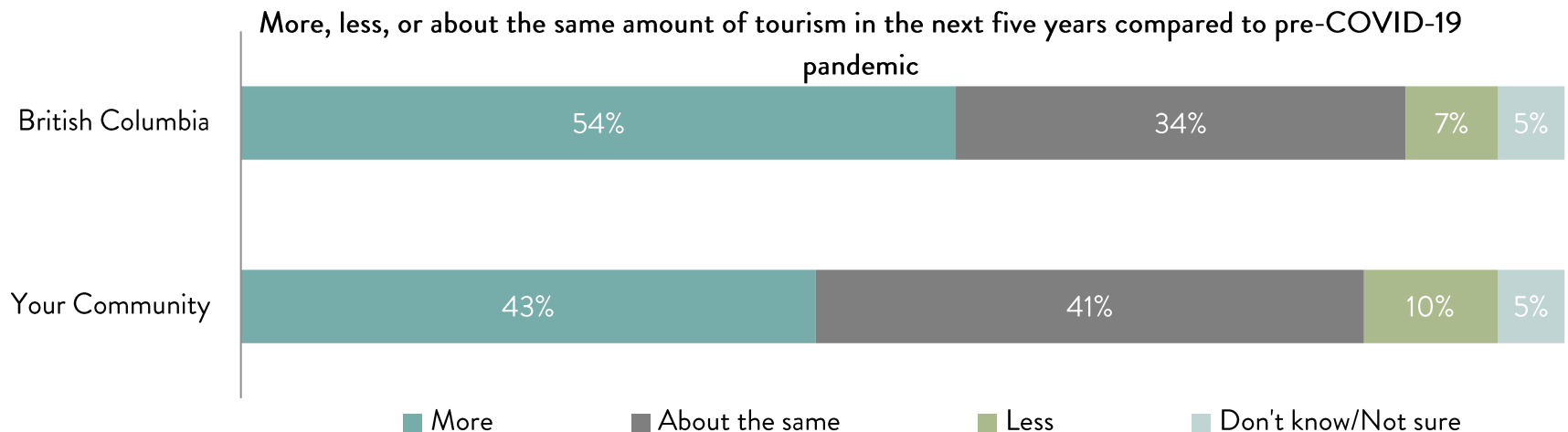
Desired tourism volume



Desired tourism volume compared to pre-COVID-19



- Over half (54%) of residents want more tourism in the province of British Columbia in the next five years, compared to before COVID-19.
- Two fifths (43%) of residents would like to see an increase in the amount of tourism in their own community.



Desired tourism volume compared to pre-COVID-19



- Northern BC residents (67%) are significantly more likely to want increased levels of tourism in BC compared to before the COVID-19 pandemic compared to other regions.
- Those aged 18-34 as well as those who have lived in BC for less than five years (45% each) are directionally less likely to want increased levels of tourism.

Residents wanting more tourism in BC in the next five years compared to pre-COVID-19 pandemic

MORE	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
British Columbia	54%	54%	55%	67%	44%	48%	46%

MORE	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2,276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
British Columbia	54%	45%	54%	59%	45%	54%	55%

Q6: In five years (i.e. 2027), would you like to see more, less or about the same amount of tourism in BC and your community, as compared to before the COVID-19 pandemic?
n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Desired tourism volume compared to pre-COVID-19



- Northern BC residents (59%) are more likely to want to see increased levels of tourism in their community compared to other regions.
- Again, those aged 18-34 (35%) and who have lived in BC for less than five years (37%) are directionally less likely to want more tourism in their community.

Residents wanting more tourism in their community in the next five years compared to pre-COVID-19 pandemic

MORE	TOTAL (n=3,806)	Region					
		Vancouver Island (n=384)	Vancouver, Coast & Mountains (n=2,371)	Northern BC (n=129)	Cariboo Chilcotin Coast (n=42)*	Thompson Okanagan (n=617)	Kootenay Rockies (n=263)
Your Community	43%	45%	43%	59%	41%	39%	39%

MORE	TOTAL (n=3,806)	Age			How Long in BC		
		18-34 (n=541)	35-54 (n=989)	55+ (n=2276)	5 Years or Less (n=216)	6 to 15 Years (n=423)	More than 15 Years (n=3,152)
Your Community	43%	35%	44%	48%	37%	45%	44%

Q6: In five years (i.e. 2027), would you like to see more, less or about the same amount of tourism in BC and your community, as compared to before the COVID-19 pandemic?

n=3,806 (rebased excluding Don't know / not sure responses)

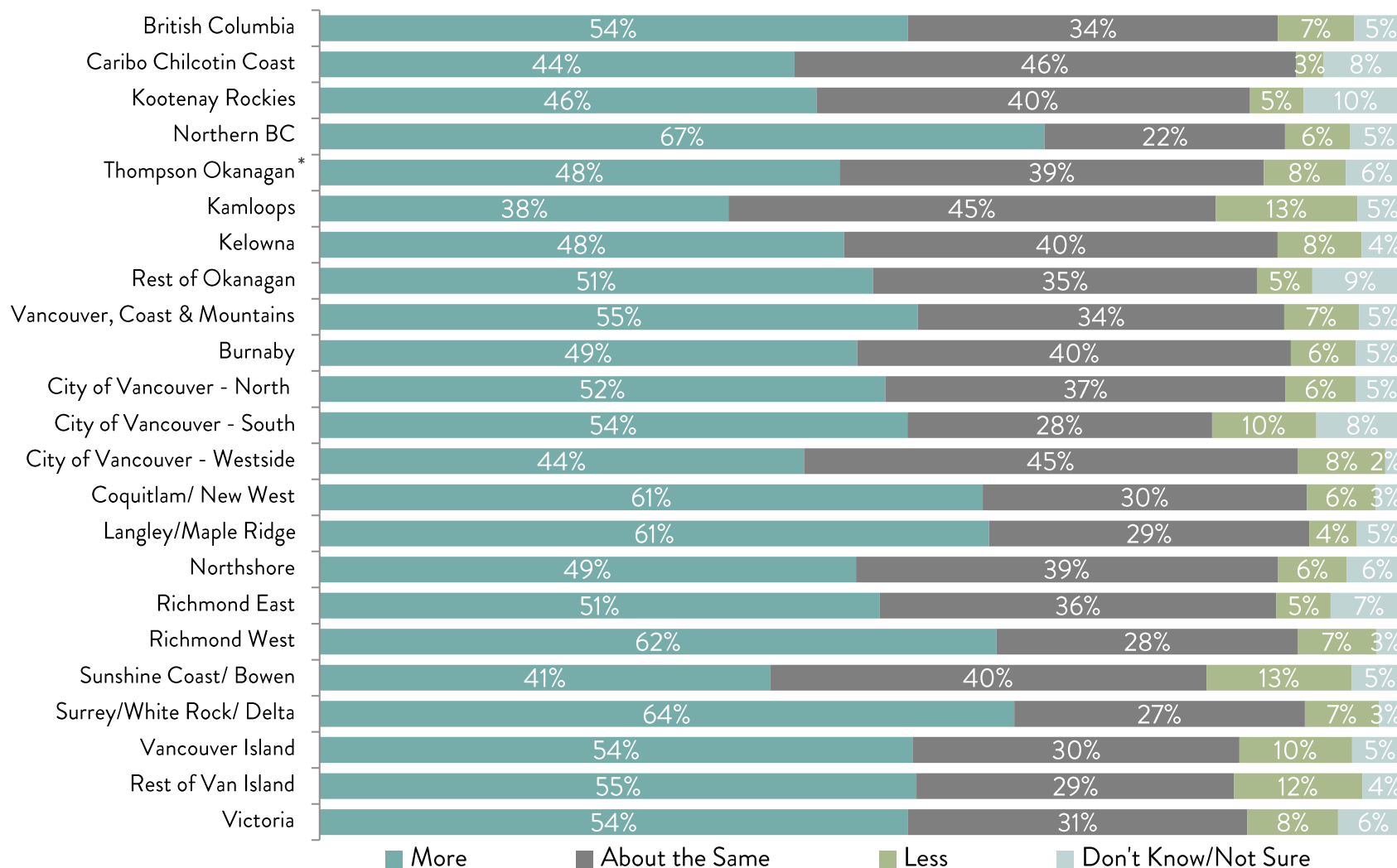
*Please interpret with caution due to low sample size.

Desired tourism volume compared to pre-COVID-19 – BC level



British Columbia -

More, less, or about the same amount of tourism in the next five years compared to pre-COVID-19 pandemic

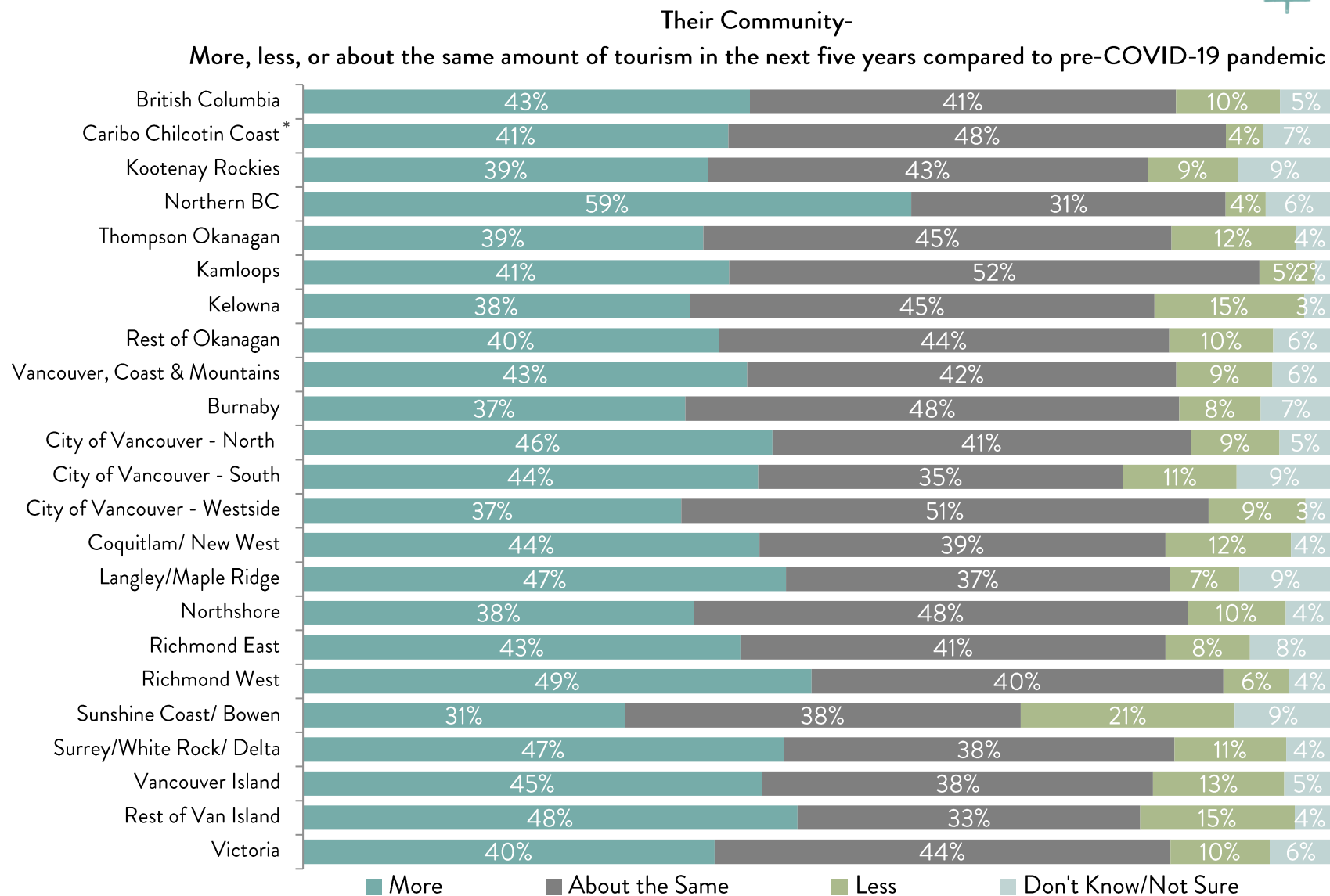


Q6: In five years (i.e. 2027), would you like to see more, less or about the same amount of tourism in BC and your community, as compared to before the COVID-19 pandemic?

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

Desired tourism volume compared to pre-COVID-19 – Community level



Q6: In five years (i.e. 2027), would you like to see more, less or about the same amount of tourism in BC and your community, as compared to before the COVID-19 pandemic?

n=3,806 (rebased excluding Don't know / not sure responses)

*Please interpret with caution due to low sample size.

An underwater photograph showing several salmon swimming in a river. The riverbed is covered with numerous smooth, rounded, brownish-orange rocks. The water is clear and greenish-blue. The salmon are silvery with some yellowish-orange markings on their heads and tails. The text "3. Background & Methodology" is overlaid in white on the left side of the image.

3. Background & Methodology

Tahsis, Vancouver Island

Background & Objectives



Background

To review BC residents' perceptions of the tourism industry relative to other major industries and to determine how important the tourism industry is perceived to be for the well-being of local communities and British Columbia, Destination BC commissioned Leger to conduct an online survey with BC residents: *The Public Perception of British Columbia's Tourism Industry*. This is the fourth time the survey has been conducted since 2017.

Objectives

The key objectives of the Public Perceptions of British Columbia's Tourism Industry survey:

- ✓ Determine how important the tourism industry is perceived to be to the economic well-being of local communities and British Columbia;
- ✓ Identify which industries are perceived to be the largest contributors to new jobs and economic activity in local communities and in British Columbia, and how the tourism industry compares to other major industries;
- ✓ Understand the perception of the economic, social/cultural, and environmental impacts tourism plays in the province; and,
- ✓ Explore residents' perceptions of the tourism industry by tourism region, age, and length of time living in British Columbia.

Methodology



Sample

In total, 3,806 online surveys were completed by BC residents using online panels. The following regional quotas were achieved, to reflect the provincial proportions and to ensure representation through statistical significance.

	Weighted Interviews		Unweighted Interviews	
Total	3,806	100%	3,806	100%
Vancouver, Coast & Mountains	2,117	56%	2,371	62%
Thompson Okanagan	667	18%	617	16%
Vancouver Island	629	17%	384	10%
Northern BC	202	5%	129	3%
Kootenay Rockies	145	4%	263	7%
Cariboo Chilcotin Coast	46	1%	42	1%

Survey Administration and Response

The online survey was fielded between April 20 and May 19, 2022.

The questionnaire is provided in the Appendix.

Methodology



Analysis and Interpretation

All data has been statistically weighted to the British Columbia population (by tourism region, age, gender) captured in the 2016 Canadian Census data. This is to ensure the sample's overall composition reflects the actual British Columbia population.

Overall results, as well as results by region, age, and length of time living in British Columbia, are reported.

When possible, comparable data from 2019 is included in this report for tracking purposes.

Practical differences between region, age, and length of time living in British Columbia and results overall are marked.



Statistics 10% higher than the overall results are noted with a green square.



Statistics 10% lower than the overall results are noted with a red circle.

Please note, due to rounding, the sum of percentages to a given question may not appear to equal 100% (i.e., off by +/- 1%).

Most questions are asked in a five-point agreement scale where the top two categories (strongly agree / somewhat agree) and the bottom two categories (strongly disagree / somewhat disagree) are grouped together as 'agree' and 'disagree'.

Generally, respondents who responded 'Don't Know' or 'Not Sure' or excluded from the results of that question.

Some sample sizes per subgroup may be small. Please interpret results with caution.

Geography Breakdowns



Results in the survey are available on a tourism-region level. Additionally, data for four questions in this report are available on a community-level when either:

- The community met a minimum population threshold to enable enough sample with standard BC representation.
- The community's Destination Marketing/Management Organisation purchased an additional sample for their community.

The determination of which questions to include in the report on a community-level was made by the Research & Analytics team at Destination BC.

Definitions

Generally community level results are separated by municipality border. However, there are occasions when Forward Sortation Area (FSA) is used to break out areas within municipalities. Some select geographic definitions, which may not be self-evident, are described below:

City of Vancouver – Westside: V5Y, V5Z, V6H, V6J, V6K, V6L, V6M, V6N, V6P, V6R, V6S, V6T

City of Vancouver – South: V5K, V5L, V5M, V5N, V5P, V5R, V5S, V5T, V5V, V5W, V5X

City of Vancouver – North: V6A, V6B, V6C, V6E, V6G, V6Z, V7Y, V7X

Kamloops: V1S, V2B, V2C, V2E, V2H

Coquitlam / New West: V3B, V3C, V3H, V3J, V3K, V3L, V3M, V3Y, V4E

Northshore: V7G, V7H, V7J, V7K, V7L, V7M, V7N, V7P, V7R, V7S, V7T, V7V, V7W, V8B, V8E, V0K*

Richmond East: V6V, V6W, V7B

Richmond West: V7A, V7C, V7E

Sunshine Coast / Bowen Island: V7Z, V8A, V0N*

Victoria: V8N, V8P, V8R, V8S, V8T, V8V, V8W, V8X, V8Y, V8Z, V9A, V9B, V9C, V9E

* Respondent must also confirm they are in the Vancouver, Coast & Mountains tourism region.

A wide-angle landscape photograph showing a vast vineyard in the foreground, with rows of green grapevines stretching across the valley. In the middle ground, there are several small buildings, including a large white house and a smaller blue-roofed structure, surrounded by trees. The background features a range of rugged mountains under a blue sky with scattered white clouds. The overall scene is peaceful and scenic, typical of a rural wine-growing region.

4. Profile of Respondents

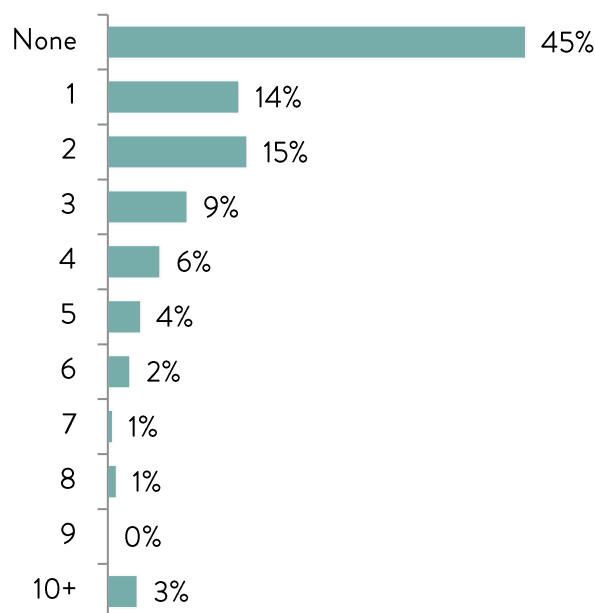
Cumberland, Vancouver Island

Leisure trips over past two years



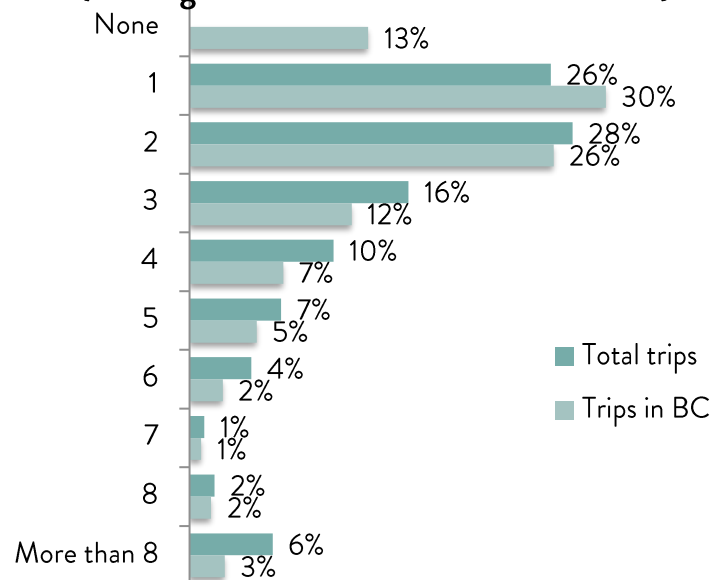
- Not surprisingly, due to the COVID-19 pandemic, the average number of leisure trips BC residents have taken out of their usual environment in the past two years (including the 45% who have taken zero trips) has dropped significantly since 2019 (1.8 compared to 3.9 in 2019).
- Of the 3.4 average total trips taken (excluding those who have not taken any trips), 2.4 of them were taken within BC, a higher proportion than before the pandemic.

Number of leisure trips taken - Total



Base: All respondents, n = 3742
(rebased excluding Don't know / not sure responses)

**Number of leisure trips have you taken – in BC
(Among those who have travelled to BC)**



Base: Respondents that have taken a leisure trip, n=1,950

	Among those taking leisure trips (excluding those taking no trips)		
	Total trips	Total trips	Trips in BC
Average 2022	1.8	3.4	2.4
Average 2019	3.9	5.2	2.0

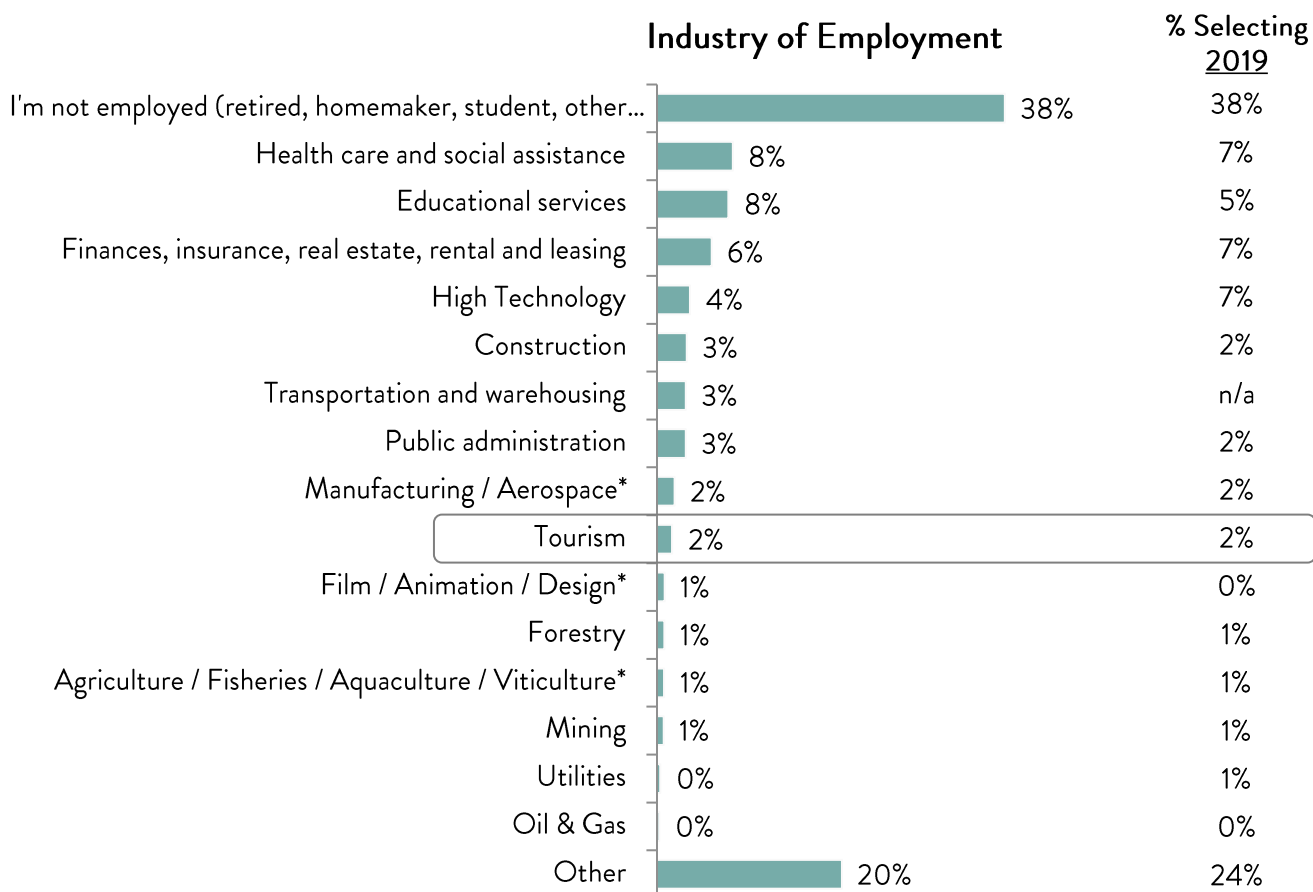
Q9. In the past two years, how many leisure trips have you taken out of your usual environment where you stayed in a paid accommodation for at least one night, if any?

Q10. [IF Q9 ≥ 1, ASK] How many of those trips were in British Columbia?

Industry of employment



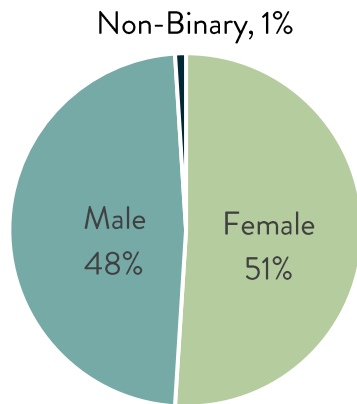
- Almost four in ten (38%) are either retired, homemakers or students.
- Only 2% identified themselves as working in the tourism industry.



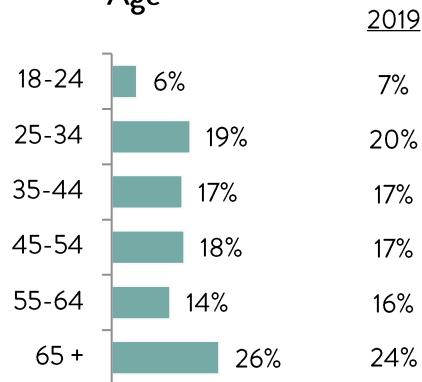
Demographics (weighted)



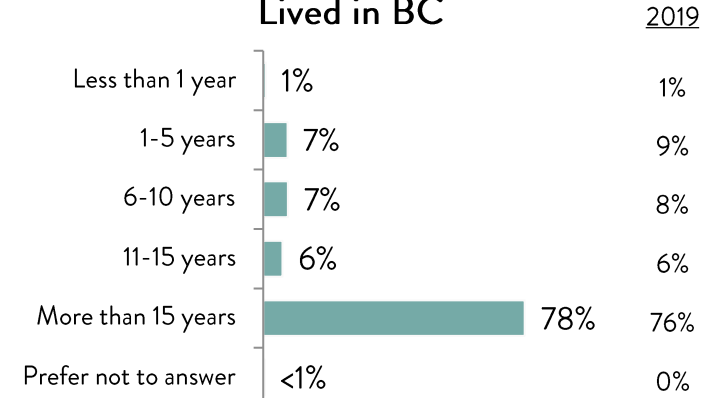
Gender



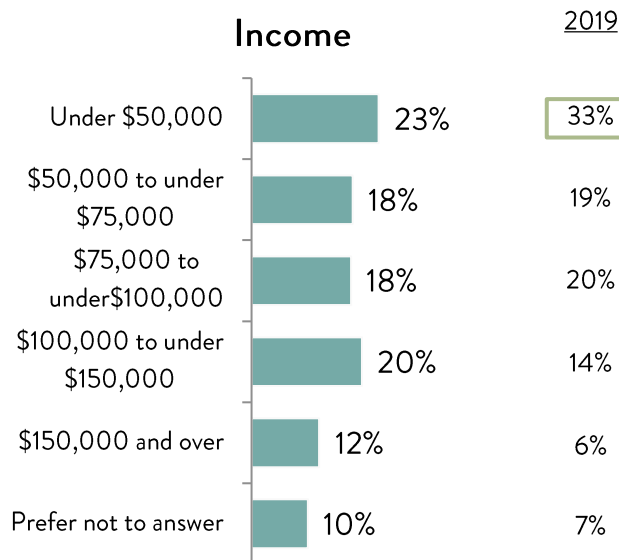
Age



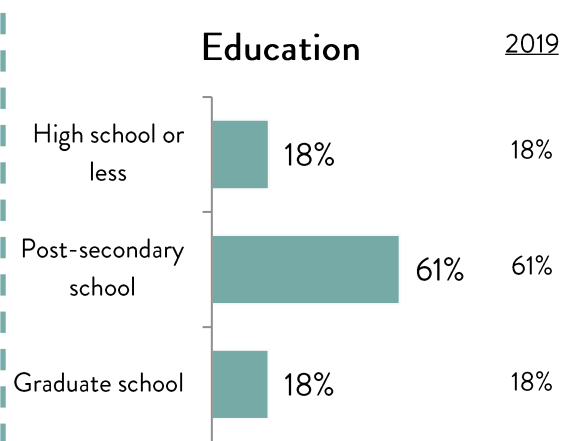
Lived in BC



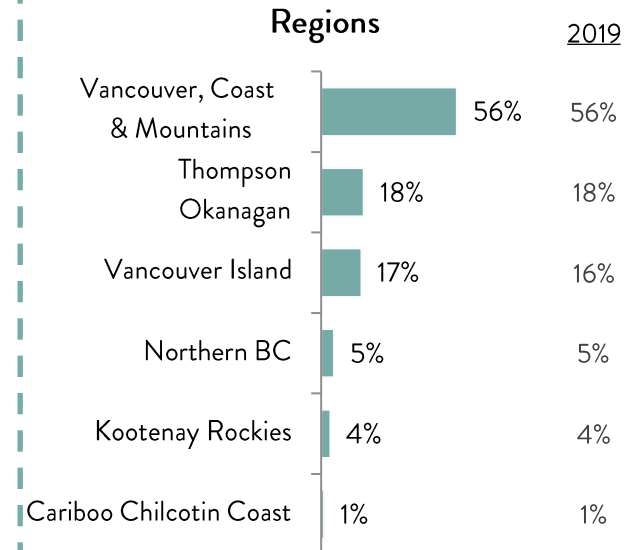
Income



Education



Regions

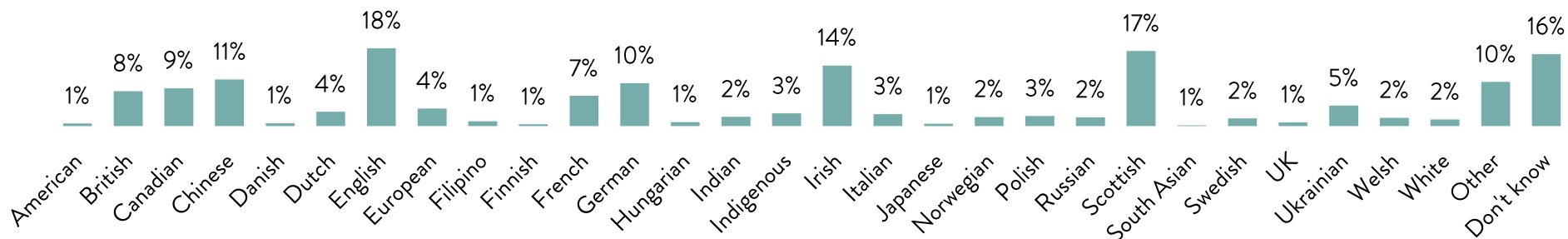


Ethnicity

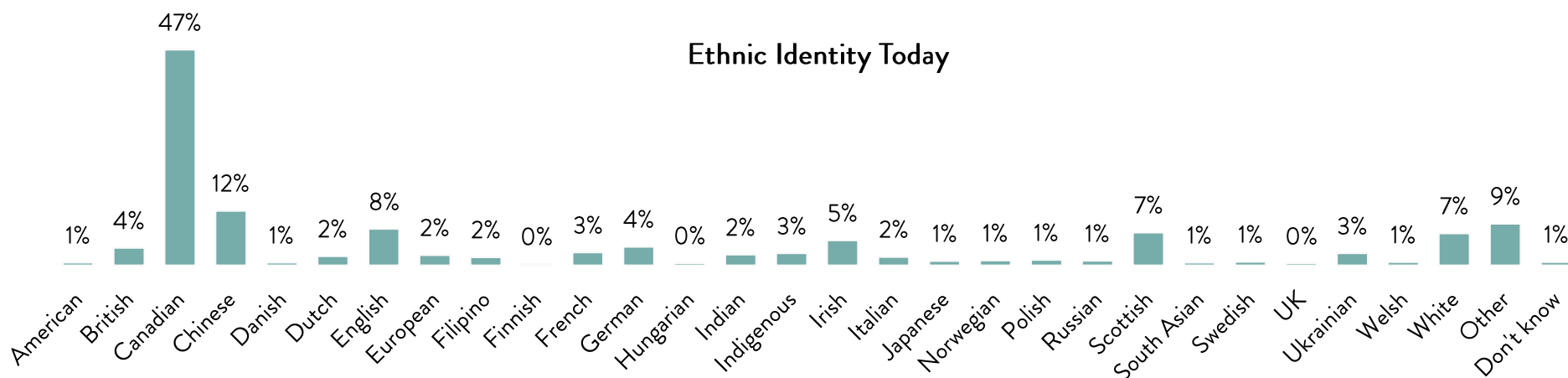


- While ethnic origin of ancestors is quite diverse, with peaks for English, Irish, and Scottish, nearly half of the population currently identify themselves as Canadian.

Ethnic Origins of Ancestors



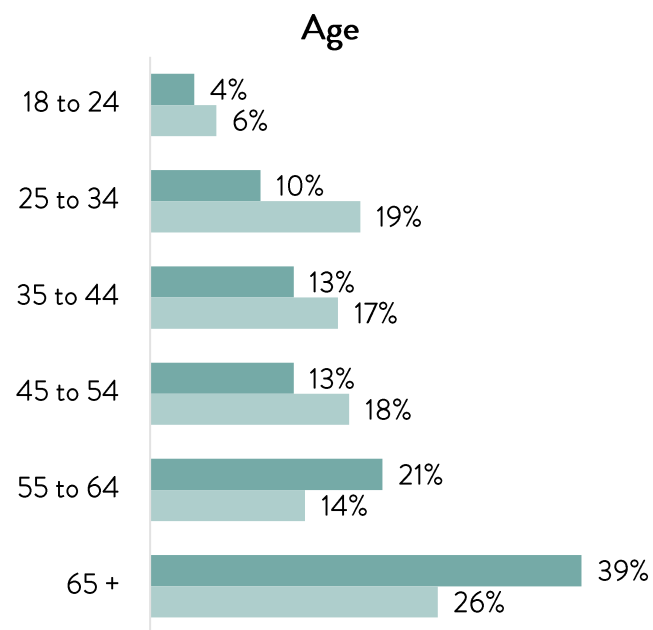
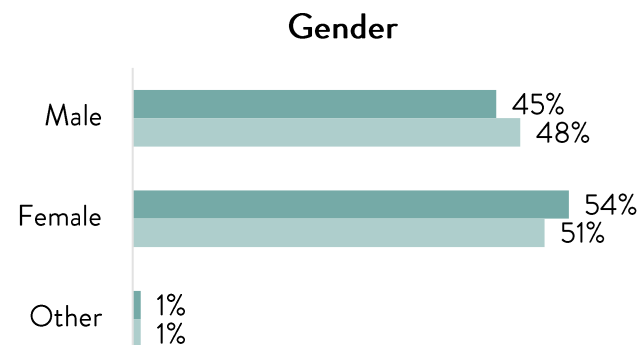
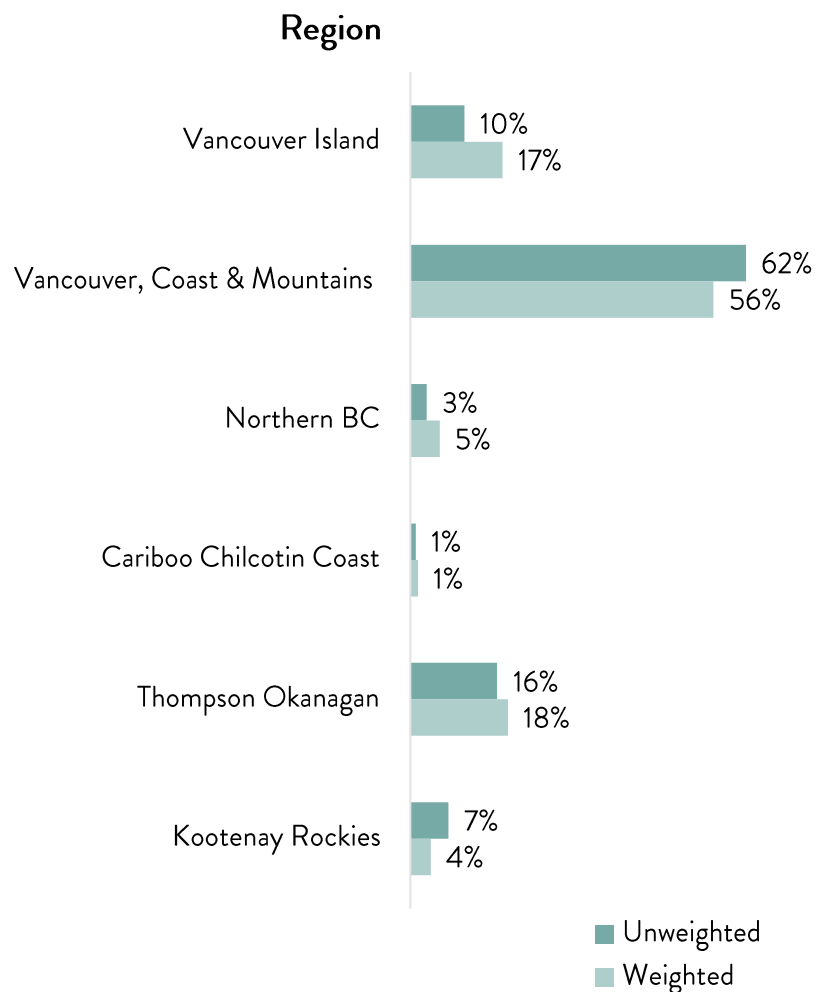
Ethnic Identity Today



Q15a: What are the ethnic origins of your ancestors? Please list as many as you'd like.

Q15b: Which ethnicity do you identify with today?

Demographics: weighted vs unweighted





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BRITISH COLUMBIA®

For questions or concerns, please contact:
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