

BC Outdoor Recreation Participant Survey

2022–2023 | SUMMARY OF KEY FINDINGS

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Summary

Executive Summary



Executive Summary

The “British Columbia Outdoor Recreation Participant Survey” consisted of two phases (summer and winter) and was conducted in 2022 and 2023 among British Columbia residents and Alberta travellers to BC. The project was a culmination of efforts made over the previous four years by several agencies across the BC Government, including the Ministry of Environment and Parks, the Ministry of Tourism, Arts, Culture and Sport (TACS), and Destination British Columbia. Leger was retained as the research supplier in 2022 and produced four detailed reports. The purpose of this report, prepared by Align Consulting Group, is to summarize the findings and identify key insights for project partner organizations and key stakeholders. The findings are highlighted below:

- **Outdoor recreation participation is strong, though it decreases from summer to winter. Alberta visitors tend to participate in outdoor recreation at higher rates than BC residents.** BC resident participation fell from 79% in summer 2022 to 69% in winter 2022–2023. Alberta travellers had the same pattern, with a smaller change (85% in summer 2022 to 82% in winter 2022–2023).
- **Health or physical limitations, motivation, and cost are the main reasons BC residents don’t participate in outdoor recreation.** Approximately three in 10 non-participants cited each of these reasons for lack of engagement, with little variation between summer and winter.

Executive Summary

- **Alberta visitors are more likely to cite time constraints, lack of motivation, disinterest, and cost as barriers to participation.** Time constraints are the most common reason, which is expected given the travel involved. Interestingly, “too expensive” becomes one of the top three reasons for non-participation in winter, with 25% of non-participants noting this as a reason compared to 18% in the summer. In contrast, 24% said they were not interested/don’t like the outdoors in the summer, which dropped significantly to 11% in winter.
- **The most popular outdoor recreation activities are park/picnic/playing in a park, hiking on a day trip (i.e., not overnight), and beach activities, including picnicking, at a river or lake.** The top three individual activities are relatively consistent between BC resident participants and Alberta visitor participants. As expected, winter participation decreases for each activity (except winter-based activities) compared to summer, more notably among BC residents than Alberta visitors.
- **Participants most commonly use designated parks and BC recreation sites and trails to engage in outdoor recreation activities.** Approximately half of BC outdoor recreation participants use designated parks in both the summer (51%) and winter (45%), while four in 10 use BC recreation sites and trails (41% in summer and 39% in winter). Alberta visitors follow a similar pattern, with 42% using designated parks in the summer and 46% in the winter. Similarly, 42% use BC recreation sites and trails in the summer, compared to 40% in the winter.

Executive Summary

- **BC residents show similar levels of participation in outdoor recreation across different regions of the province.** The exception is residents in the Cariboo Chilcotin Coast, who indicate lower participation levels than other regions. Overall, participation across regions saw a 10-point decline between summer and winter. Vancouver, Coast & Mountains is the only region with a less noticeable difference (76% in summer, 68% in winter).
- **The most popular outdoor recreation activities are relatively consistent among residents across regions in BC; however, there is variation as the list continues.** Similar to overall results, park activities, beach activities, and hiking are generally the most popular outdoor activities. Regions near the ocean see high participation levels in ocean-related activities. In addition, camping is among the top five activities for three regions (Northern BC, Cariboo Chilcotin Coast, and the Thompson Okanagan), while skiing is included in the top five for the Kootenay Rockies.
- **BC resident participants are more likely to be outdoor recreation “travellers” during the summer.** The proportion of participants who travelled 40 kilometres or more from their BC community (“travellers”) decreased from 67% in summer 2022 to 56% in winter 2022–2023. Not surprisingly, all regions experience a lower proportion of travellers in the winter than summer. Significantly more residents say they don’t participate in outdoor recreation in the winter due to inclement weather, weather-related concerns about travel, or availability of preferred activities.

Executive Summary

- **Northern BC resident participants are most likely to be “travellers.” This is not surprising given the large geographical spread of this region.** In fact, 79% of Northern BC resident participants are considered “travellers” in the summer. This is notably higher than all other regions, except for the Kootenay Rockies (71%). During the winter, the proportion of “travellers” decreases for all regions, particularly those in the Thompson Okanagan, Kootenay Rockies, and Vancouver Island.

- **Destinations for overnight outdoor recreation trips differ between BC residents and Alberta visitors and appear driven, at least in part, by proximity.** Given the proximity, it isn’t surprising that Alberta visitors were more likely to visit the Kootenays on their outdoor recreation trip in BC. Similarly, Alberta visitors are less likely to visit Vancouver Island, the Gulf Islands, or the Vancouver, Coast & Mountains region

In contrast, BC resident participants who travel over 40 kilometres for an overnight trip most commonly visit the Okanagan-Similkameen/ Thompson-Nicola, Vancouver Island or Gulf Islands, Metro Vancouver, and Whistler/ Squamish/ Sunshine Coast/ South Coast.

Executive Summary

- **Summer encourages more participation overall, and also more frequent participation.** Approximately one in three BC outdoor recreation participants are heavy users (i.e., they took four or more trips for outdoor activities, made at least one overnight trip of 40 kilometres or more from home, and participated in adventure tourism). Significantly more BC outdoor recreation participants are heavy users in the summer compared to winter.
- **Heavy outdoor recreation users tend to be younger and are more likely to have a family.** They are notably more likely than other outdoor recreation users to be between the ages of 18–34, have a graduate or postgraduate degree, and have children in their household.
- **Generally, outdoor recreation participants are experienced.** Over half report they are experienced, a trend that remains consistent across seasons and markets.
- **More than one-quarter of outdoor recreation participants are adventure travellers, meaning they not only travel outside their community, but also participate in an activity that has a cost associated with all or part of it.** In fact, 35% of BC summer outdoor recreation participants are considered adventure tourists, though this significantly drops to 26% in winter.

Executive Summary

- **The top motivations for participating in outdoor recreation are to do something fun and to get out of the house.** These reasons do not appear to vary by season or market, with nearly nine in 10 noting that these are important for participating in outdoor recreation.
- **Outdoor recreation appears to influence where people live—even more so for BC resident participants who partake in winter outdoor recreational activities.** In fact, 61% of BC winter participants say proximity to outdoor recreation highly influences where they choose to reside, which is notably higher than BC summer participants (54%). Given that people tend to travel less for outdoor recreation in the winter, it's logical that residents may consider the availability and proximity of their preferred winter outdoor recreational activities when choosing where to live.

SUMMARY: OUTDOOR RECREATION PARTICIPANT SURVEY 2022-2023

Outdoor Recreation Participants

BRITISH COLUMBIA



ALBERTA

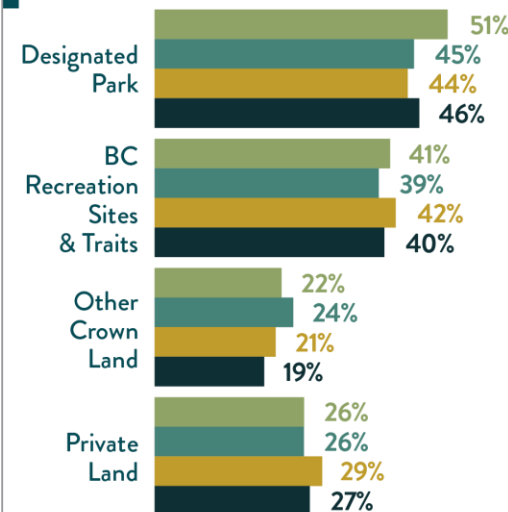


Top 5 Activities (groupings)

		BC Summer	BC Winter	AB Summer	AB Winter
	Beach or Nature	1	1	1	1
	Hiking/climbing/caving/equestrian	2	2	2	2
	Swimming and other water-related sports	3	3	4	3
	Camping/RVing	4	4	3	5
	Wildlife viewing or photography	5			4
	Sailing/boating		5		
	Mountain biking			5	

40+KM "Traveller"	67%	56%	100%	100%
40+KM day trip**	79%	80%	57%	60%
Avg day trips	4.4	3.7	1.5	1.6
40+KM overnight**	79%	74%	75%	72%
Avg overnight trips	3.4	2.8	2.0	1.9

Land Type



Considered "Heavy" Participants



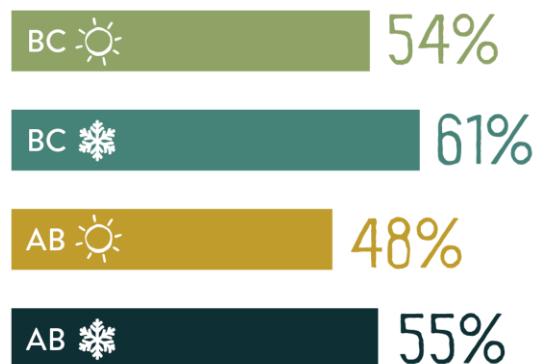
Average Day Trip Spend



Top 3 Reasons for Not Participating



OR Proximity Influences Where they Reside



Outdoor Recreation Participation

79%

participated in outdoor activities in summer 2022

Top 5 Activities (individuals)



Park/picnic/playing in a park

50%



Hiking on a day trip

43%



Beach activities, including picnicking, at a river or lake

42%



Oceanside beach activities, including picnicking

34%



Swimming—lake or river

32%

Top 3 Reasons for Not Participating

32%

Health or physical limitations

31%

Not motivated

26%

Too expensive

67%

Travelled 40+km outside of own community for outdoor recreation
79%** Day trips
79%** Overnight trips

Average Day Trip Spend



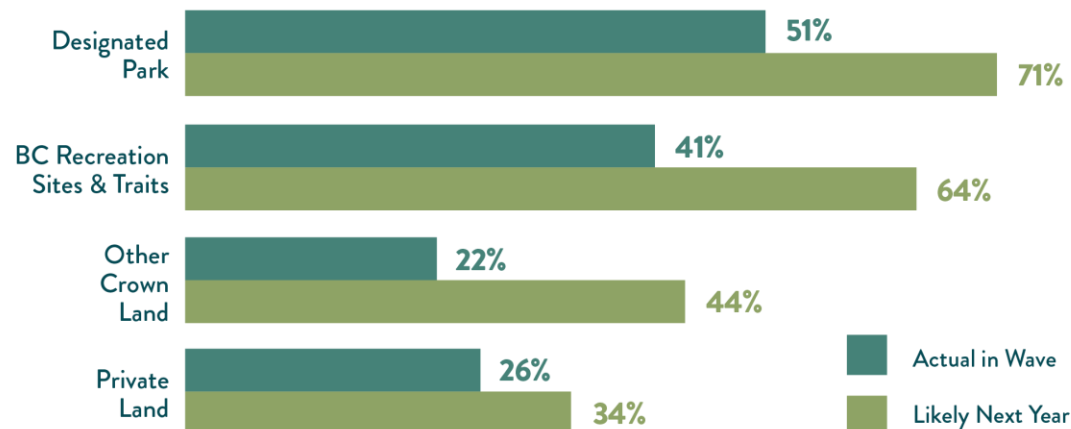
\$417

average total spend on OR activities by day trip travellers

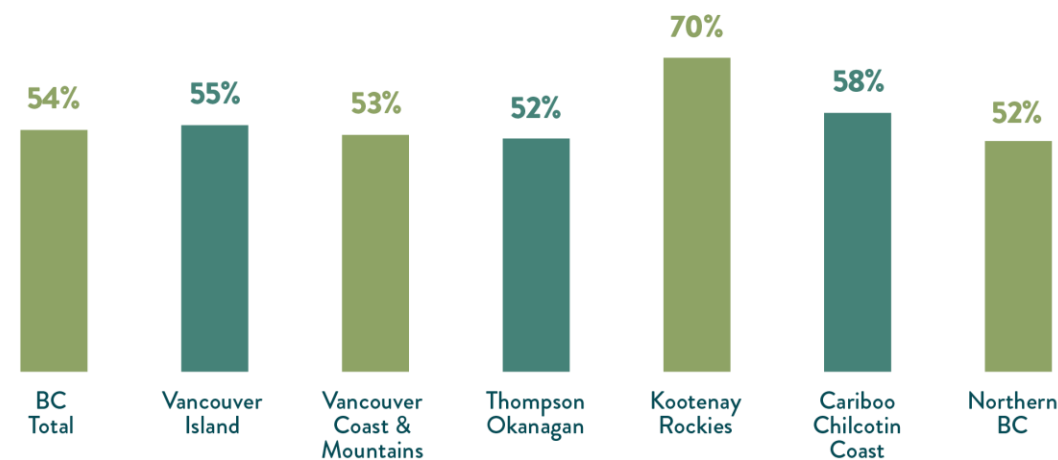
\$1,126

(adventure) / \$772 (non-adventure) = average total spend on OR activities by overnight trip travellers

Land Type Participated On



OR Proximity Influences Where they Reside by Region



Outdoor Recreation Participation

69%

participated in outdoor activities in winter 2022–2023

Top 5 Activities (individuals)



Park/picnic/playing in a park

38%



Hiking on a day trip trip (i.e. not overnight)

35%



Beach activities, including picnicking, at a river or lake

24%



Oceanside beach activities, including picnicking

24%



Cycling primarily on gravel roads or trails (15%)/Other nature viewing or scenic photography, painting or drawing (15%)/Trail running (15%)/Bird-watching (15%)

15%

Top 3 Reasons for Not Participating

29%

Too expensive

29%

Health or physical limitations

29%

Not motivated

56%

Travelled 40+km outside of own community for outdoor recreation
80%* Day trips
74%** Overnight trips

Average Day Trip Spend



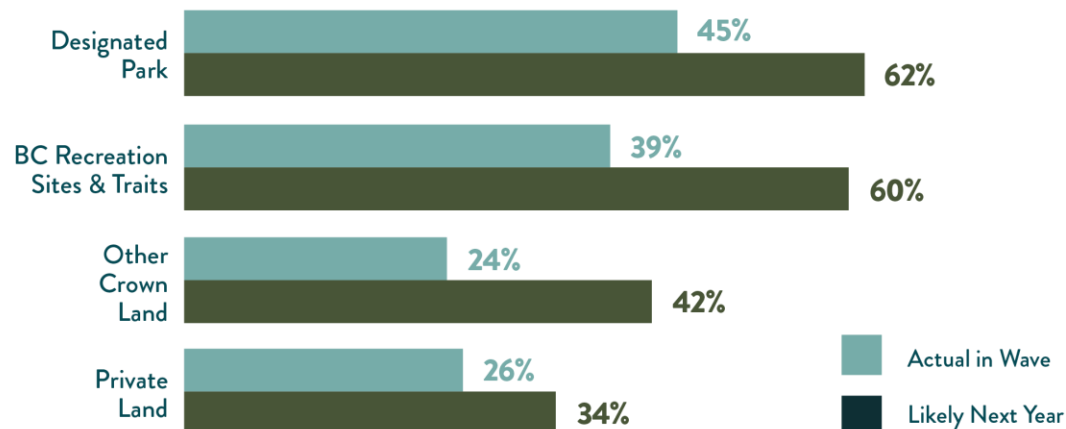
\$556

average total spend on OR activities by day trip travellers

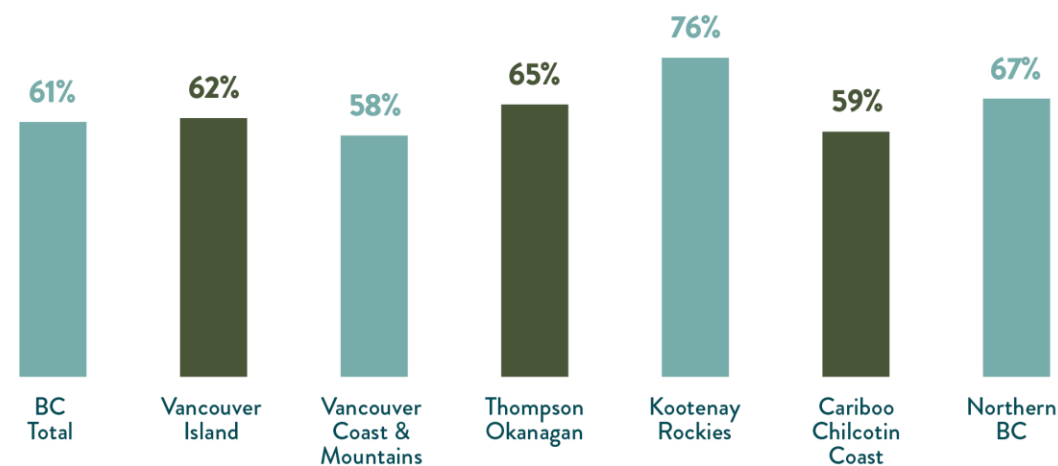
\$1,029

(adventure) / \$494 (non-adventure) = average total spend on OR activities by overnight trip travellers

Land Type Participated On



OR Proximity Influences Where they Reside by Region



Outdoor Recreation Participation

85%

participated in outdoor activities in summer 2022

Top 5 Activities (individuals)

	Hiking on a day trip (i.e. not overnight)	48%
	Park/picnic/playing in a park	46%
	Beach activities, including picnicking, at a river or lake	41%
	Swimming—lake or river	34%
	Oceanside beach activities, including picnicking	24%

Top 3 Reasons for Not Participating

35%

Not enough time

24%

Not interested/
don't like outdoors

21%

Not motivated



Travelled 40+km outside of own community for outdoor recreation
57%** Day trips
75%** Overnight trips

Average Day Trip Spend



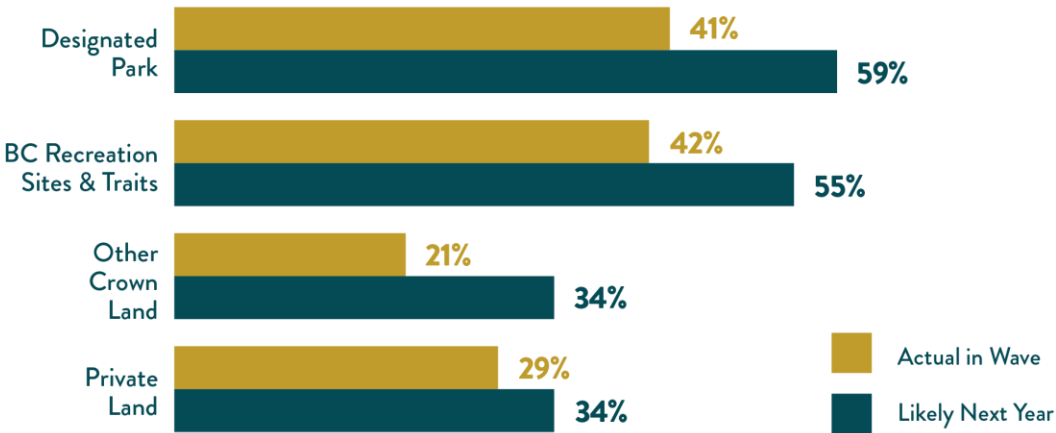
\$712

average total spend on OR activities by day trip travellers

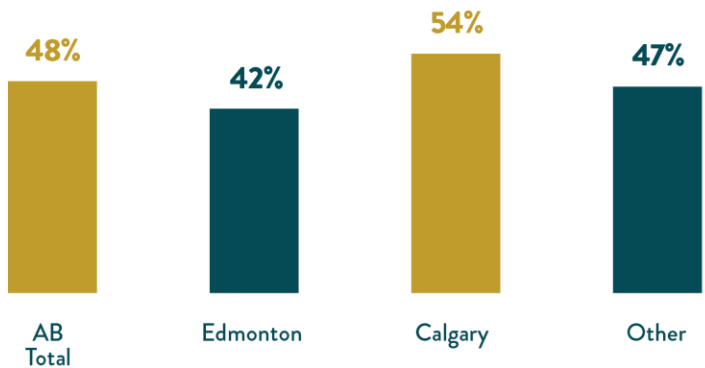
\$1,395

(adventure) = average total spend on OR activities by overnight trip travellers

Land Type Participated On



OR Proximity Influences Where they Reside by Region



All % are of OR Participant * of all respondents ** of OR Participants who travelled 40+ km.

Outdoor Recreation Participation

82%

participated in outdoor activities in winter 2022–2023

Top 5 Activities (individuals)

	Hiking on a day trip (i.e. not overnight)	46%
	Park/picnic/playing in a park	44%
	Beach activities, including picnicking, at a river or lake	34%
	Swimming—lake or river	24%
	Oceanside beach activities, including picnicking (21%)/ Other nature viewing or scenic photography, painting or drawing (21%)	21%

Top 3 Reasons for Not Participating

46%

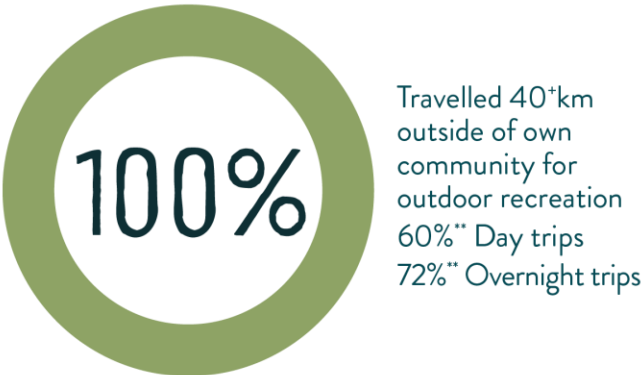
Not enough time

25%

Too expensive

18%

Not motivated



Average Day Trip Spend



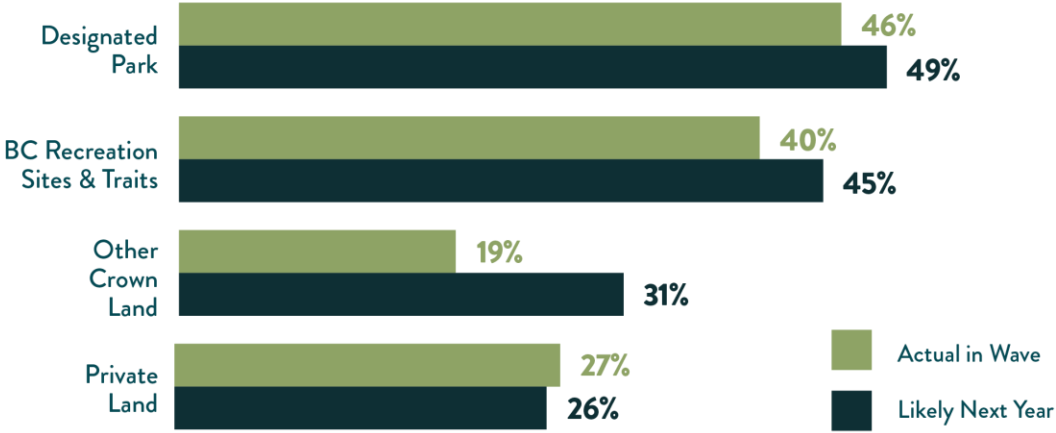
\$431

average total spend on OR activities by day trip travellers

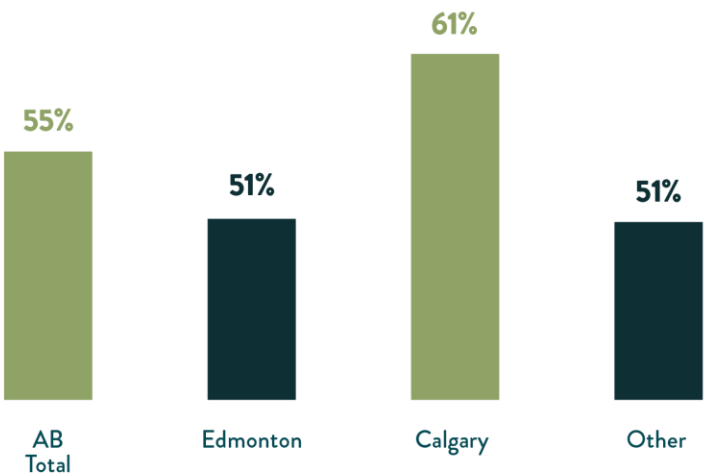
\$1,066

(adventure)/\$788 (non-adventure) = average total spend on OR activities by overnight trip travellers

Land Type Participated On



OR Proximity Influences Where they Reside by Region



All % are of OR Participant * of all respondents ** of OR Participants who travelled 40+ km.

BRITISH COLUMBIA

ALBERTA

Overall Outdoor Recreation Participants



Top 5 Outdoor Recreational Activities

Park/picnic/playing in a park 50%

Hiking on a day trip 43%

Beach activities, including picnicking, at a river or lake 42%

Oceanside beach activities, including picnicking 34%

Swimming—lake or river 32%

Park/picnic/playing in a park 38%

Hiking on a day trip trip (i.e. not overnight) 35%

Beach activities, including picnicking, at a river or lake 24%

Oceanside beach activities, including picnicking 24%

Cycling primarily on gravel roads or trails (15%)/Other nature viewing or scenic photography, painting or drawing (15%)/Trail running (15%)/Bird-watching (15%) 15%

Hiking on a day trip (i.e. not overnight) 48%

Park/picnic/playing in a park 46%

Beach activities, including picnicking, at a river or lake 41%

Swimming—lake or river 34%

Oceanside beach activities, including picnicking 24%

Hiking on a day trip (i.e. not overnight) 46%

Park/picnic/playing in a park 44%

Beach activities, including picnicking, at a river or lake 34%

Swimming—lake or river 24%

Oceanside beach activities, including picnicking (21%)/Other nature viewing or scenic photography, painting or drawing (21%) 21%





Top 3 Reason for Not Participating**



*Percent of all respondents. **Percent of all respondents who did not participate in outdoor recreation.

BRITISH COLUMBIA

ALBERTA

	 67% Summer	 55% Winter	 100% Summer	 100% Winter
40+km "Traveller"				
40+KM day trip**	79%	80%	57%	60%
Avg day trips	4.4	3.7	1.5	1.6
40+KM overnight**	79%	74%	75%	72%
Avg overnight trips	3.4	2.8	2.0	1.9
% Adventure Tourist	35%	26%	68%	56%
% Heavy User	35%	29%	—	—
Holds OR Membership	7%	13%	8%	10%
Participate with Immediate Family	49%	50%	57%	55%
Proximity of OR has Impact on Where they Live	54%	60%	48%	55%

**Percent of outdoor recreation participants who travel for outdoor recreation.

BRITISH COLUMBIA

ALBERTA



Age			
18–34	24%	32%	38%
35–54	50%	42%	30%
55+	3.4	2.8	2.0
Education			
High school or less	23%	23%	20%
Certificate/diploma	24%	25%	20%
Degree	27%	26%	31%
Graduate/postgraduate degree	26%	25%	27%
Identify as First Nations	4%	6%	5%
Identify as LGBTQ+	11%	11%	9%
Have Disability/Impairment	16%	19%	12%
Household Size	2.4 people	2.4 people	2.7 people
% of Households with Children	19%	22%	32%
Household Income			
Under \$75,000	46%	45%	31%
\$75,000–\$149,999	40%	42%	49%
\$150,000+	14%	13%	20%

Introduction

A scenic view of a waterfall cascading into a turquoise river, surrounded by a dense forest. In the foreground, the backs of two people wearing hats are visible as they look towards the waterfall.

Introduction



1.1. BACKGROUND

Between 2020 and 2021, several external developments emphasized the importance of updating outdoor recreation data. These included, but were not limited to, the Outdoor Research Council releasing an outdoor recreation research proposal in fall 2021; the Tourism Industry Association of Alberta releasing the “Alberta’s Crown Land Outdoor Recreation Economy” report in late summer 2021; and the 2020 update to Washington State’s “Economic Analysis of Outdoor Recreation in Washington State.” In contrast, British Columbia lacked up-to-date data, with its most recent studies dating back to 2009-2011, including the “BC Outdoor Recreation Study” (2009-2010), the “BC Parks Economic Impact Study” (2009-2010), and the “Socio-Economic Impact of Recreation Site” (2011).

In 2022, a working group for the project gained commitment from two British Columbia Government Ministries (Environment and Parks; and Tourism, Arts, Culture and Sport), as well as the Province’s tourism marketing and destination management Crown corporation, Destination BC, to move the project forward.

The “British Columbia Outdoor Recreation Participant Survey” was conducted between 2022 and 2023. The project was a culmination of efforts made over the previous four years by several agencies across the BC Government.

Introduction



1.2. PROJECT PURPOSE & OBJECTIVES

The goal of this project is to update previously completed studies by British Columbia (2009–2010) to quantify the participation (domestic and travellers), diversity of users, social drivers, barriers, and economic trends of outdoor recreation and adventure tourism in British Columbia.

Based on this, the primary objectives of the study were to:

1. Measure participation in outdoor recreation and adventure tourism in British Columbia, by both BC residents and Alberta visitors, across summer and winter seasons;
2. Establish the economic impact of the outdoor recreation sector and adventure tourism e.g., direct/indirect/induced impacts, jobs, GDP; and,
3. Establish recreation participation trends for BC.

Introduction



1.3. REPORTING

Leger was retained to conduct the study, which focused on both BC residents and Alberta visitors across two seasonal waves (summer and winter). The summer wave was conducted in fall 2022, and the winter wave followed in spring 2023. Each wave gathered data on outdoor recreation participation during the previous year.

This report, prepared by Align Consulting Group on behalf of Destination BC and other project partners, serves as a summary of the four detailed research reports produced by Leger. These reports are available under separate covers:

- BC Residents Phase 1: Summer 2022
- BC Residents Phase 2: Winter 2022–2023
- Alberta Visitors Phase 1: Summer 2022
- Alberta Visitors Phase 2: Winter 2022–2023

All data presented in this report is sourced from the above reports and the data collected by Leger for this project.

Introduction



1.4. NOTES ON INTERPRETATION

All data presented, except for overall participation, which reflects the percentage of all respondents, represents percentages among outdoor recreation participants only. Other exceptions are noted in the footnotes of the relevant tables or graphs.

"In addition to statistical significance, the report also highlights practical differences, which are defined as differences of +/- 10% or more between subgroups. These are visually indicated using **blue** text for notably higher values and **red** text for corresponding lower values.

Introduction

1.5. KEY TERMS

BC Resident Participants

These are BC residents who noted that they participated in at least one outdoor recreation activity during the previous four-month period (summer: June 2022–September 2022, winter: December 2022–March 2023).

Alberta Visitors

The base for the Alberta portion of the survey is Alberta residents who travelled to BC within the past two years. When referring to “Alberta Travellers” in this report, we are referring to the proportion who participated in at least one outdoor recreation activity in BC during their most recent trip in BC.

Outdoor Recreation Travellers (BC Only)

These are BC resident participants who travelled at least 40 kilometres outside their community to participate in at least one outdoor recreation activity. In contrast, local participants are those who stayed within 40 kilometres of their community for all outdoor recreation activities. Please note that all Alberta visitors who participated in outdoor recreation are considered “travellers.”

Introduction

1.5. KEY TERMS continued

Adventure Tourism

Adventure tourism refers to a subset of outdoor recreation activities that involves travelling at least 40 kilometres from home and involves a financial transaction or reward for services such as transportation, training, adventure guiding, food services, improvement, or entertainment related to the activity.

Examples of adventure tourism in BC include river rafting, helicopter skiing, and rock climbing. Adventure tourism can be “soft” (e.g., low-risk activities like backpacking, camping, hiking, and kayaking) or “hard” (e.g., high-risk activities requiring intense commitment, professional guides, and advanced skills such as climbing mountains/rock/ice, trekking, and caving).

Heavy Users (BC Only)

BC residents who, between the four previous months (summer: June 2022–September 2022, winter: December 2022–March 2023), took four or more trips for outdoor activities, made at least one overnight trip of 40 kilometres or more from home, and participated in adventure tourism (paid a fee for the outdoor activity at least once).

A full-page background image with a blue color overlay. It depicts a mountain biker in the lower-left foreground, wearing a red and white jersey and a backpack, standing on a rocky ridge. The biker is looking out over a vast, layered mountain range under a clear sky. The mountains in the distance are partially covered in snow. The overall mood is serene and adventurous.

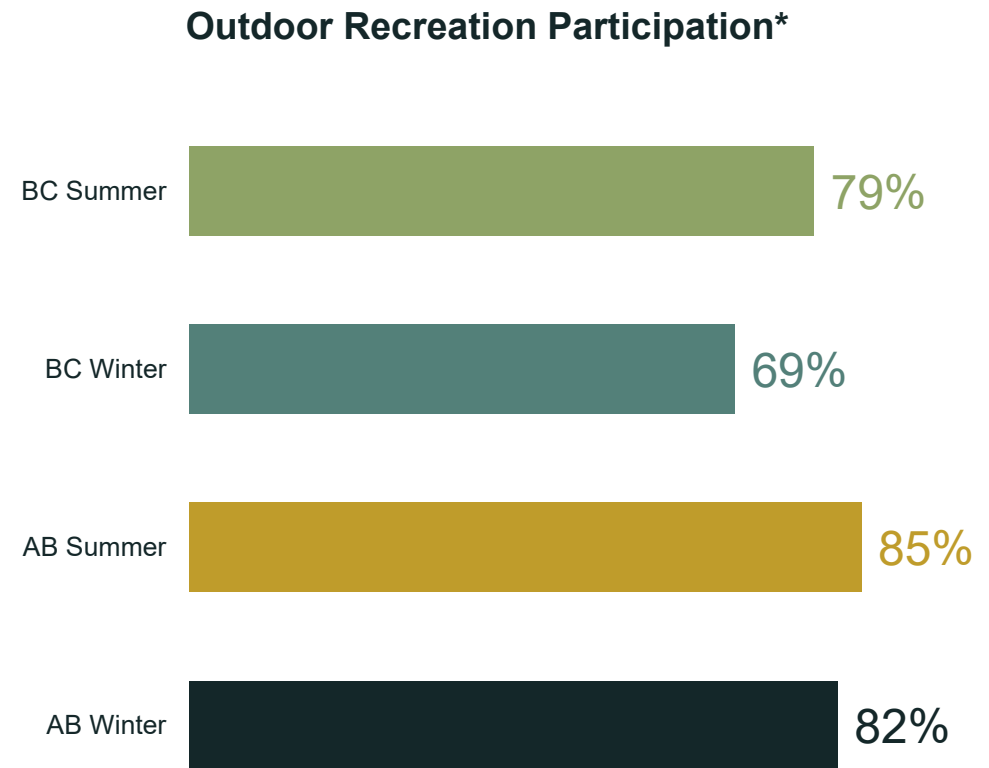
Key Findings

1. Key Findings: Outdoor Recreation Participation

Approximately eight in 10 (79%) BC residents participated in outdoor recreation during summer 2022. This dropped to seven in 10 (69%) during winter 2022–2023.

Alberta visitors have a slightly higher outdoor recreation participation level in the summer with 85% (+6 points over BC residents). However, this difference increases markedly during the winter. In fact, 82% of Alberta visitors to BC participated in outdoor recreation during winter 2022–2023, which is notably higher than 69% of BC residents (+13 points).

The most common reasons for not participating in outdoor recreation are health or physical limitations, lack of motivation, cost, and time constraints. Time is particularly an issue, understandably, for Alberta visitors.



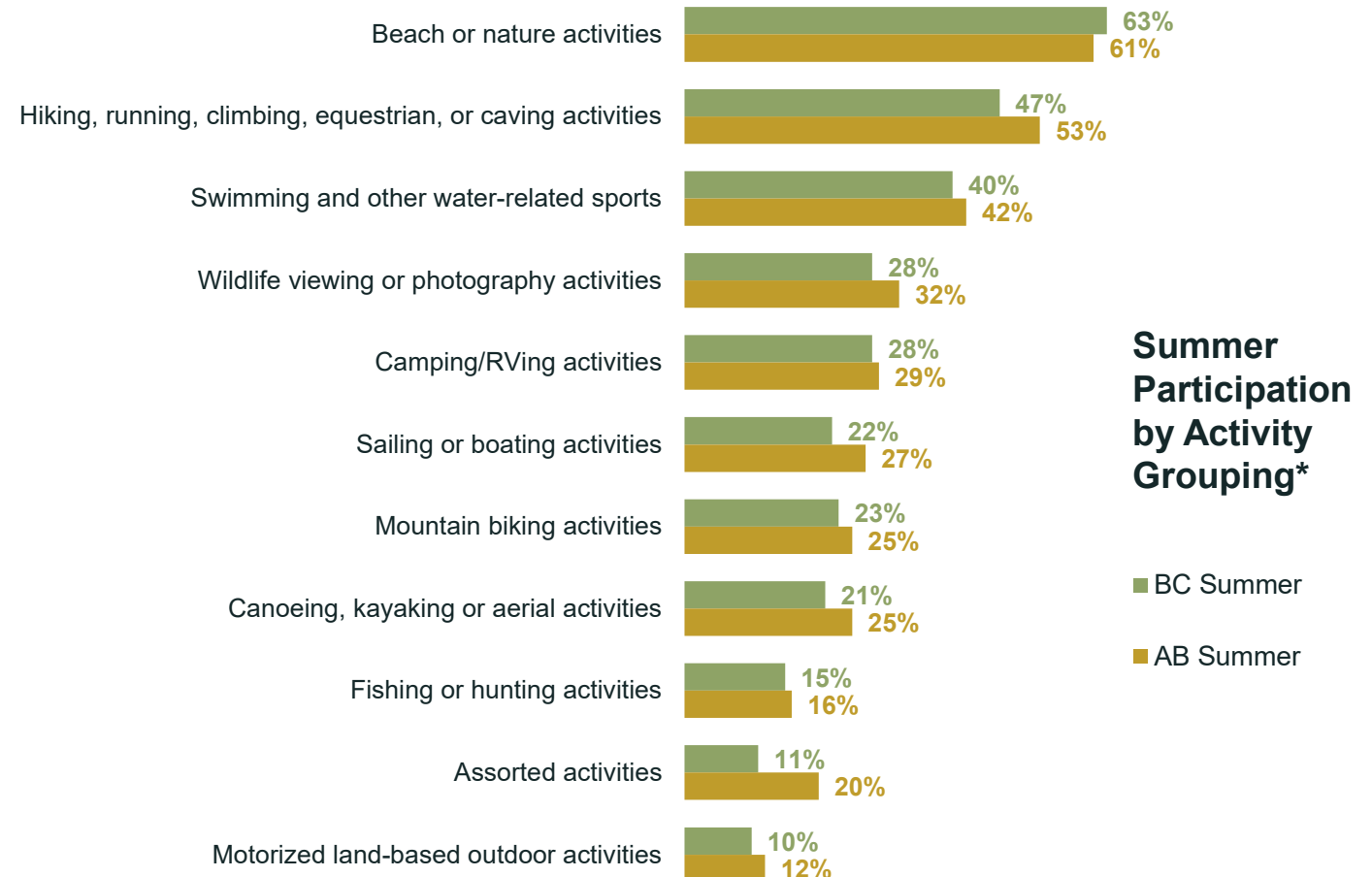
1. Key Findings: Outdoor Recreation Participation

Summer Activity Grouping

By far, the most popular activities in the summer are beach or nature activities for both BC residents (63%) and Alberta visitors (61%).

As we will see throughout this report, hiking, running, climbing, equestrian, and caving activities are also very popular in the summer (47% of BC residents and 53% of Alberta visitors). This grouping is predominantly driven by high participation in hiking on a day trip.

Camping/RVing activities, as well as fishing or hunting activities, see consistent participation levels in the summer among BC residents and Alberta visitors (28% and 29%, respectively, for camping/RVing activities and 15% and 16%, respectively, for fishing or hunting activities).



1. Key Findings: Outdoor Recreation Participation

Winter Activity Grouping

Interestingly, beach or nature activities is the most popular winter outdoor activity grouping for both BC residents (48%) and Alberta visitors (56%). Hiking, running, climbing, equestrian, or caving activities closely follow, with 40% of BC residents and 53% of Alberta visitors participating in these activities in the winter months. Skiing/snowboarding activities, which are effectively a seasonal offering, saw 16% participation among BC residents and 12% among Alberta visitors.



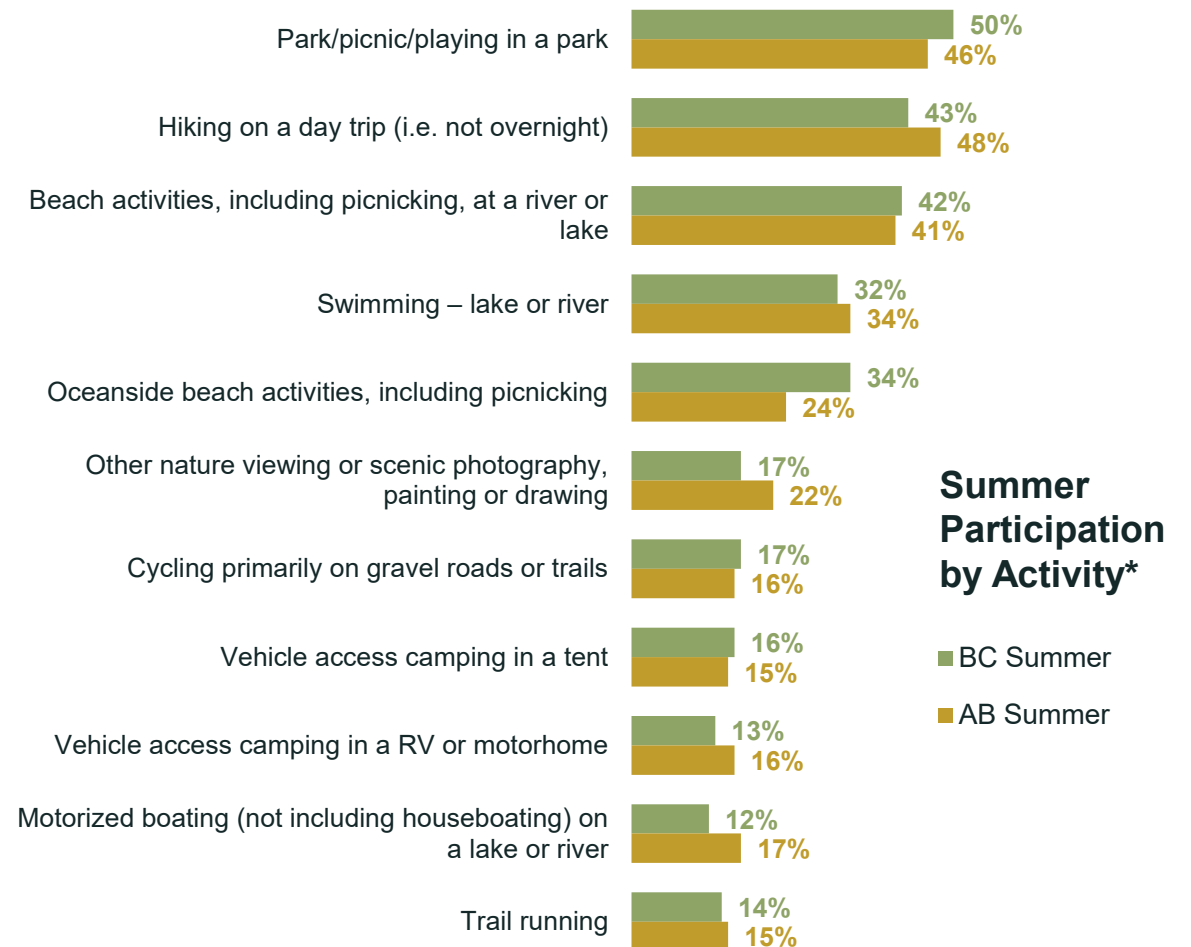
A1. ...did you participate in any of the following [grouping name] activities in British Columbia, and if so, how many trips did you participate in total for each activity? Base: All respondents

1. Key Findings: Outdoor Recreation Participation

Top 10 Individual Summer Activities

For individual activities, the most common summer outdoor recreation activities in the province were park/picnic/play in a park (50% of BC residents and 46% of Alberta visitors), hiking on a day trip (43% of BC residents and 48% of Alberta visitors), and beach activities, including picnicking, at a lake or river (42% of BC residents and 41% of Alberta visitors).

Although there are some differences in the participation levels of BC residents and Alberta visitors for the top summer activities, most are not notable. The exception is oceanside beach activities, including picnicking, which saw 34% of BC residents participate compared to only 24% of Alberta visitors. Given that many Alberta visitors may not have travelled to the BC coast, this difference is not surprising.



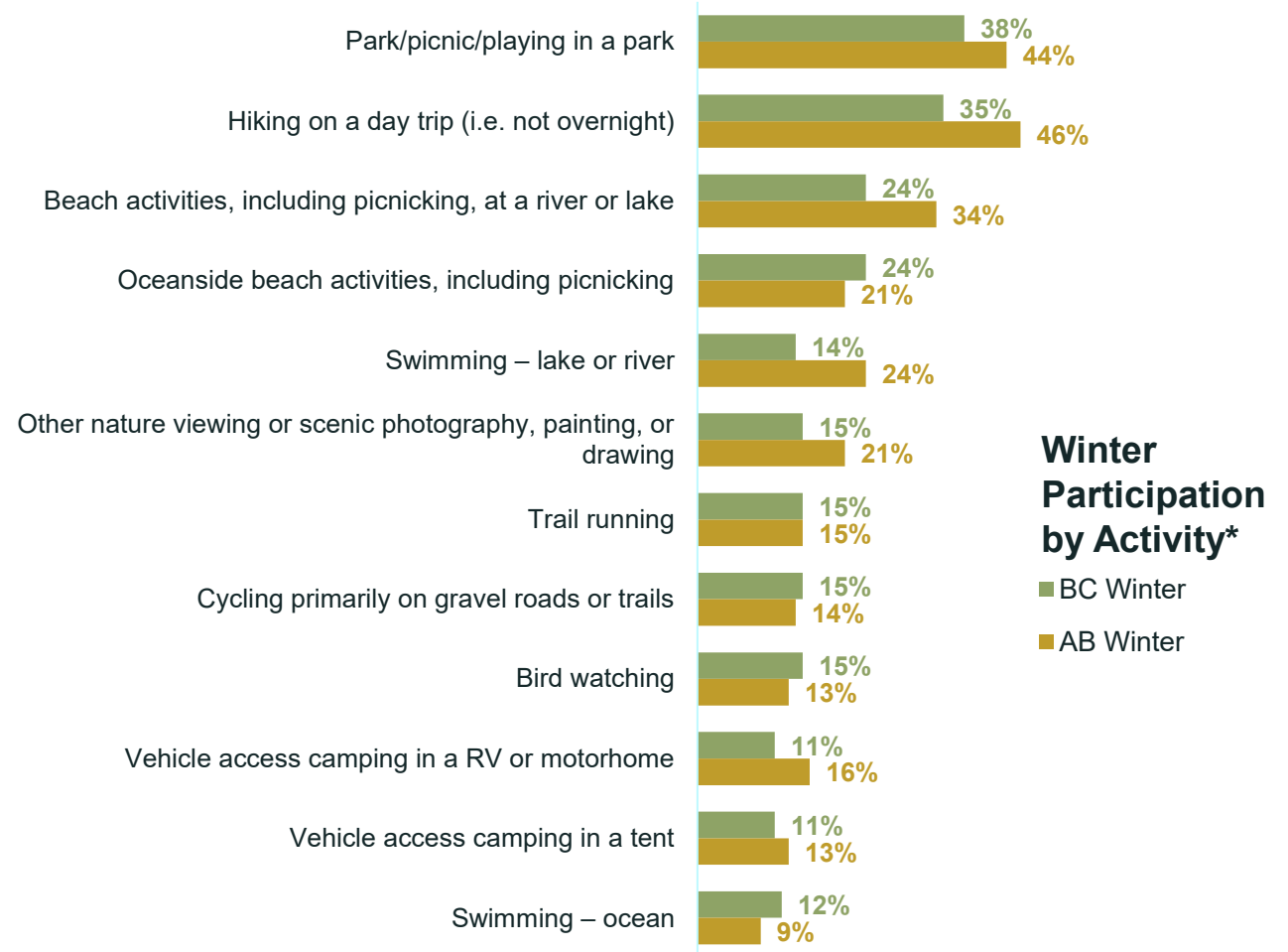
A1. ...did you participate in any of the following [grouping name] activities in British Columbia, and if so, how many trips did you participate in total for each activity? Base: All respondents

1. Key Findings: Outdoor Recreation Participation

Top 10 Individual Winter Activities

The most common individual winter outdoor recreation activities in the province were park/picnic/play in a park (38% of BC residents and 44% of Alberta visitors), hiking on a day trip (35% of BC residents and 46% of Alberta visitors), and beach activities, including picnicking, at a lake or river (24% of BC residents and 34% of Alberta visitors).

Generally, Alberta visitors have higher participation levels than BC residents. Given the nature of the different populations, this is somewhat to be expected. There are three notable differences in the participation levels of BC residents and Alberta visitors for the top winter activities: Alberta visitors are notably more likely to participate in hiking on a day trip (46% vs. 35% of BC residents), beach activities, including picnicking, at a lake or river (34% vs. 24% of BC residents), and swimming in a lake or river (24% vs. 14% of BC residents).



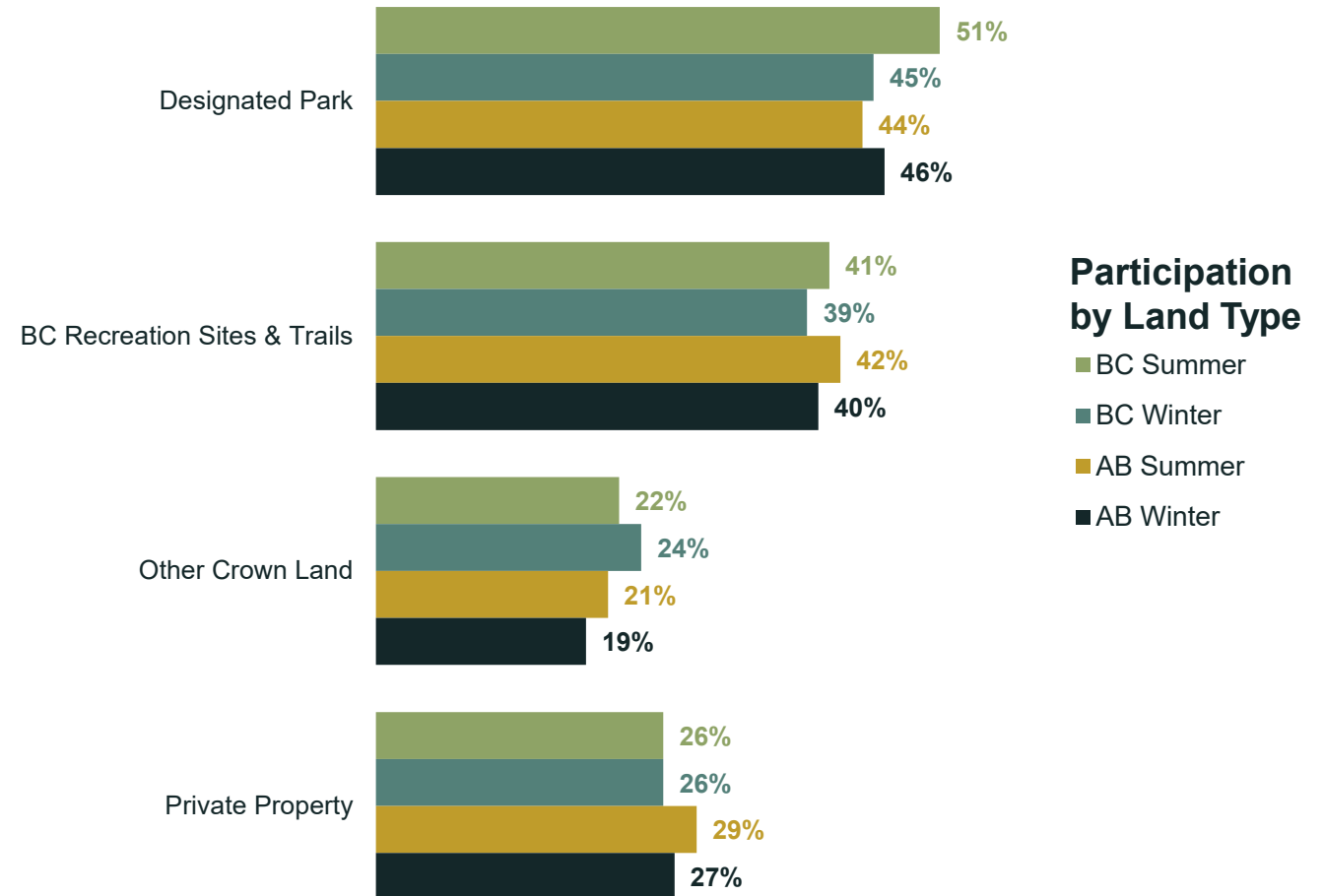
2. Key Findings: Land Use/Type for Outdoor Recreation

Participation by Land Type

Participation levels by land type follow consistent patterns among both BC residents and Alberta visitors, with similar trends observed between seasons.

BC summer participants are the most likely to use designated parks, with 51% reporting usage. BC winter, Alberta summer, and Alberta winter participation at designated parks is consistent at 45%.

Other crown land and private property use does not notably vary between either season or market.



2. Key Findings: Land Use/Type for Outdoor Recreation



BC Summer



BC Winter



AB Summer



AB Winter

Participated in OR on/at:

Designated Park	51%	45%	44%	46%
BC Recreation Sites & Trails	41%	39%	42%	40%
Other Crown Land	22%	24%	21%	19%
Private Property	26%	26%	29%	27%

Likely to Use Next

Year/Season:

Designated Park	71%	62%	59%	49%
BC Recreation Sites & Trails	64%	60%	55%	45%
Other Crown Land	44%	42%	34%	31%
Private Property	34%	34%	34%	26%

2. Key Findings: Land Use/Type for Outdoor Recreation

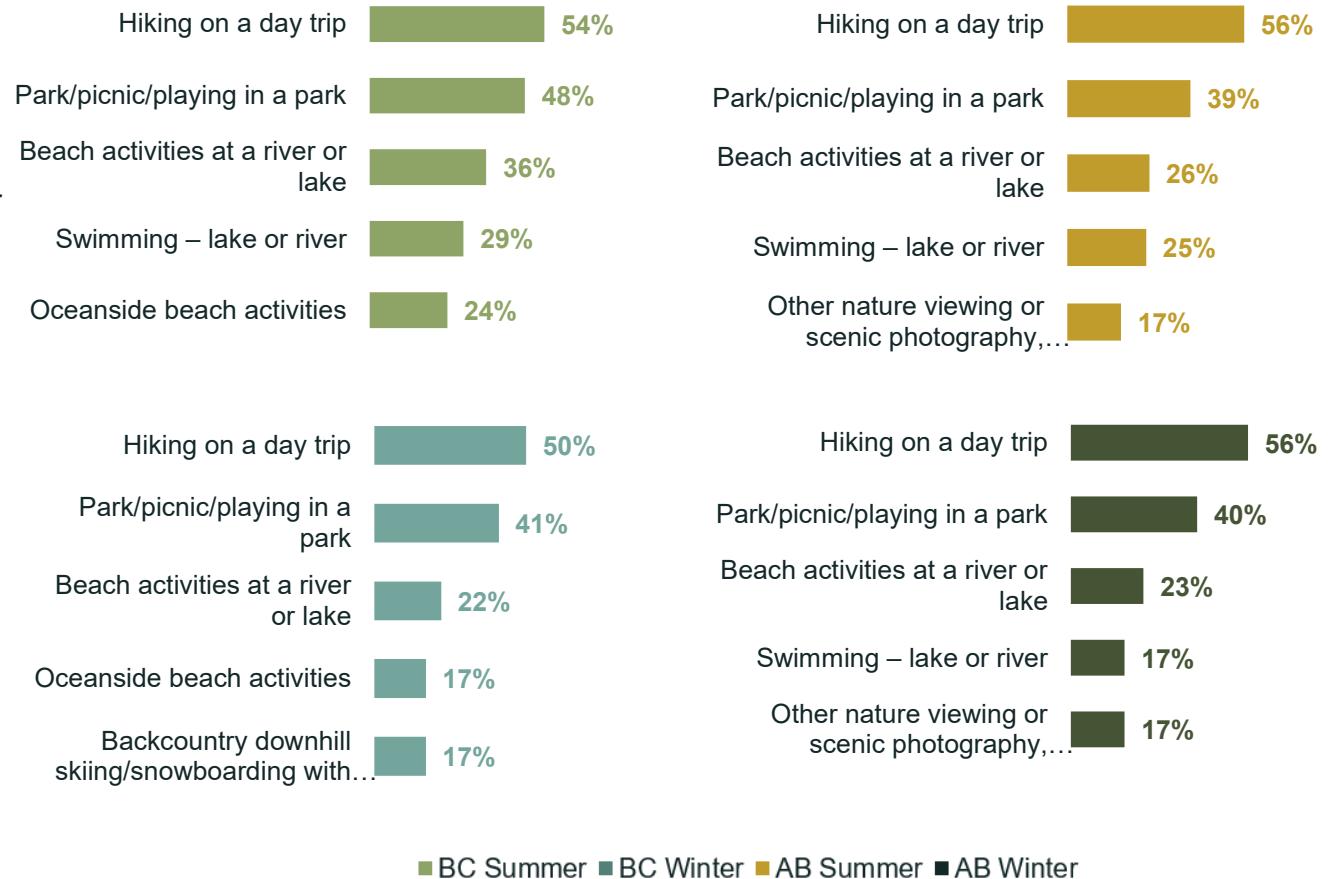
Designated Parks

As shown in the graphs, hiking on a day trip, park/picnic/playing in a park, and beach activities at a river or lake are the top three most popular activities in designated parks for both BC residents and Alberta visitors in summer and winter.

For BC residents, swimming in a lake or river (29%) and oceanside beach activities (24%) round out the top five activities in the summer. In the winter, oceanside beach activities remain somewhat popular in designated parks (17%), but swimming is replaced by backcountry downhill skiing/snowboarding with snowmobile lift access (sled-skiing) (17%).

Although there are some shifts in participation, the top five activities for Alberta visitors at designated parks remain consistent between the summer and winter.

Top 5 Activities – Designated Parks



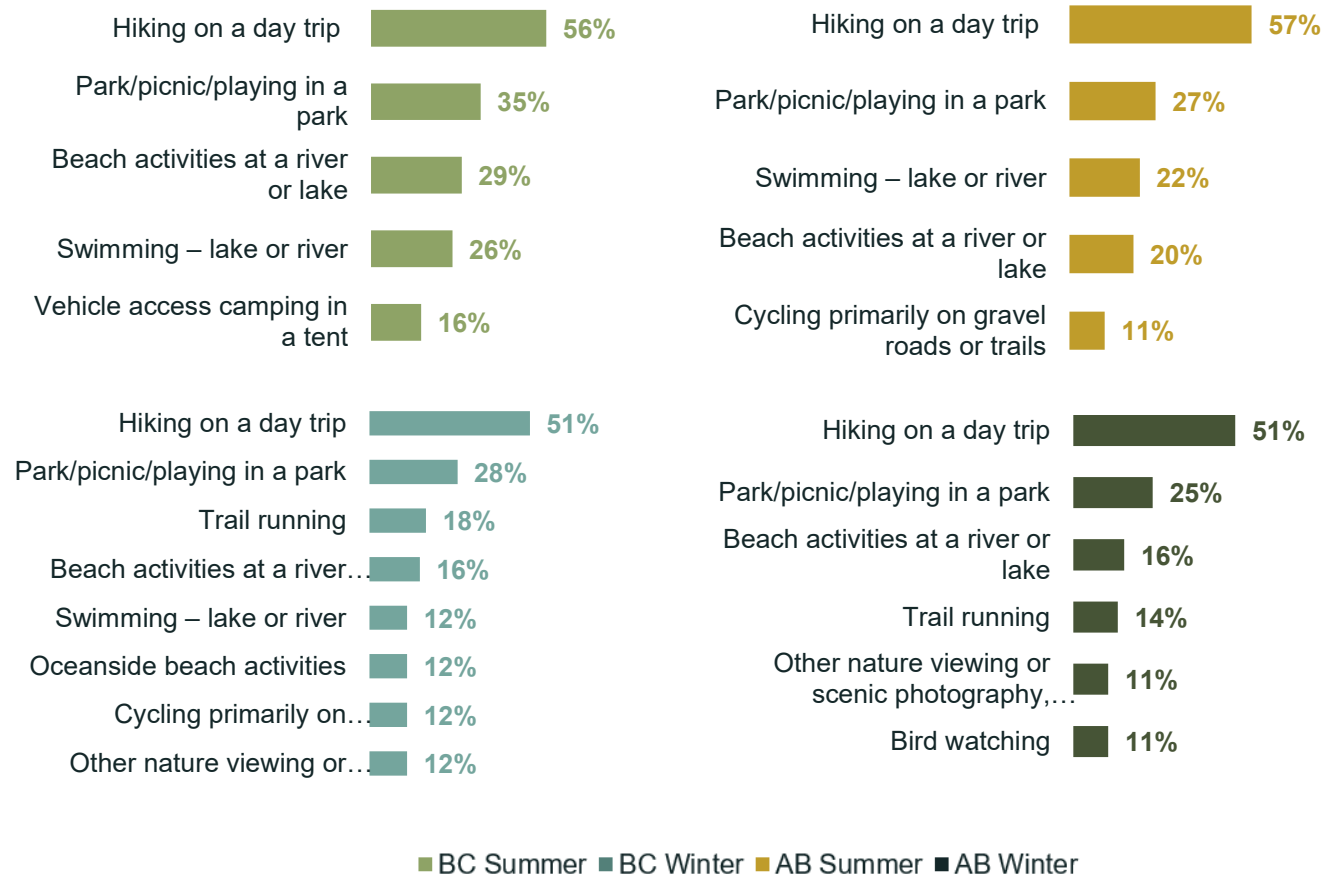
2. Key Findings: Land Use/Type for Outdoor Recreation

BC Recreation Sites & Trails

Not surprisingly, hiking on a day trip is the most popular activity at BC recreation sites and trails (BCRST) for both markets and seasons. Park/picnic/playing in a park is also consistent across markets and seasons as the second most common activity at BCRST. Beach activities at a river or lake are also popular, though the order of magnitude and position in terms of top activities shifts between BC residents and Alberta visitors and, as we would expect, between summer and winter.

Trail running emerges for both BC residents (18%) and Alberta visitors (14%) as a popular activity during the winter.

Top 5 Activities – Designated Parks



2. Key Findings: Land Use/Type for Outdoor Recreation

Other Crown Land

As with previously discussed public land, hiking on a day trip is the most popular activity on other crown land for both markets and in both seasons. Swimming is the second most popular summer activity for BC residents (22%) and Alberta visitors (17%) alike. Beach activities at a river or lake and park/picnic/playing in a park are also among the top five activities all around; however, freshwater fishing emerges for Alberta visitors in the summer (15%) and BC residents in the winter (13%). Backcountry downhill skiing/snowboarding with snowmobile lift access (sled-skiing) also ranks among the top five winter activities for both markets (13% for BC residents and 15% for Alberta visitors).

Top 5 Activities – Designated Parks



2. Key Findings: Land Use/Type for Outdoor Recreation

Private Property

The most popular activities on private property are relatively consistent with public land use previously noted; however, vehicle access camping in an RV or motorhome emerges in the top five activities for this land type for both BC residents (12%) and Alberta visitors (12%).

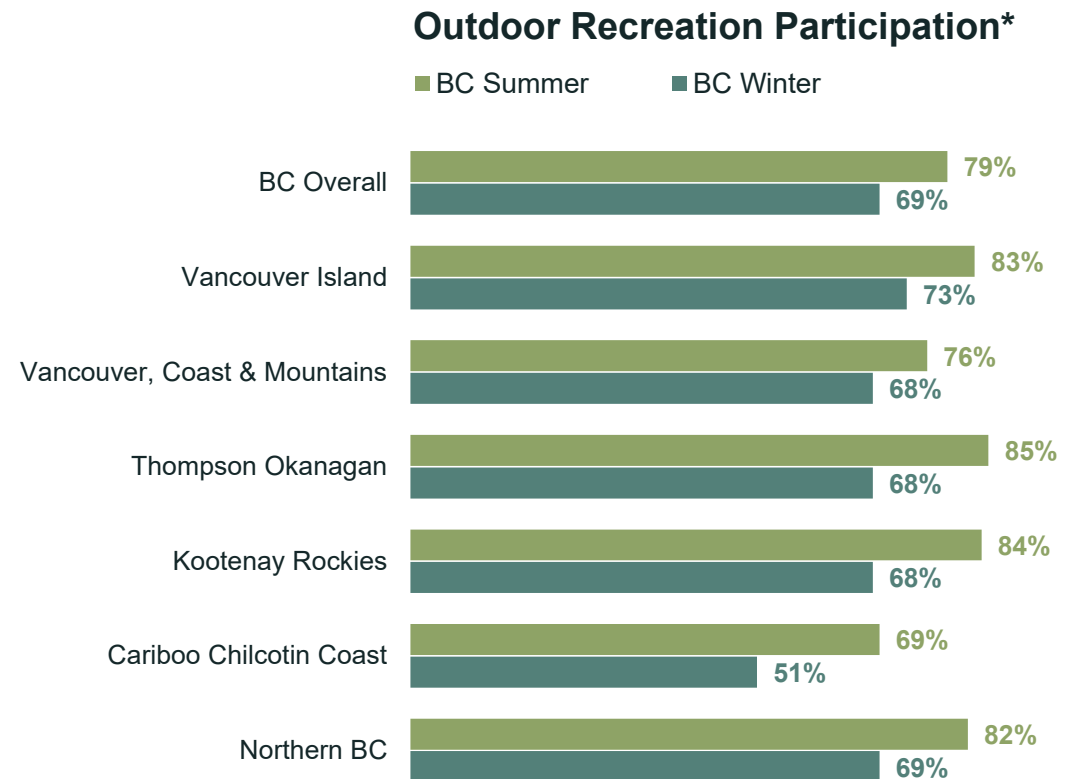
Top 5 Activities – Designated Parks



3. Key Findings: Participation by Tourism Region (BC ONLY)

Participation levels in outdoor recreation are relatively consistent across regions with the exception of the Cariboo Chilcotin Coast, which has notably lower participation levels in both summer (69% vs. 79% overall) and winter (51% vs. 69% overall).

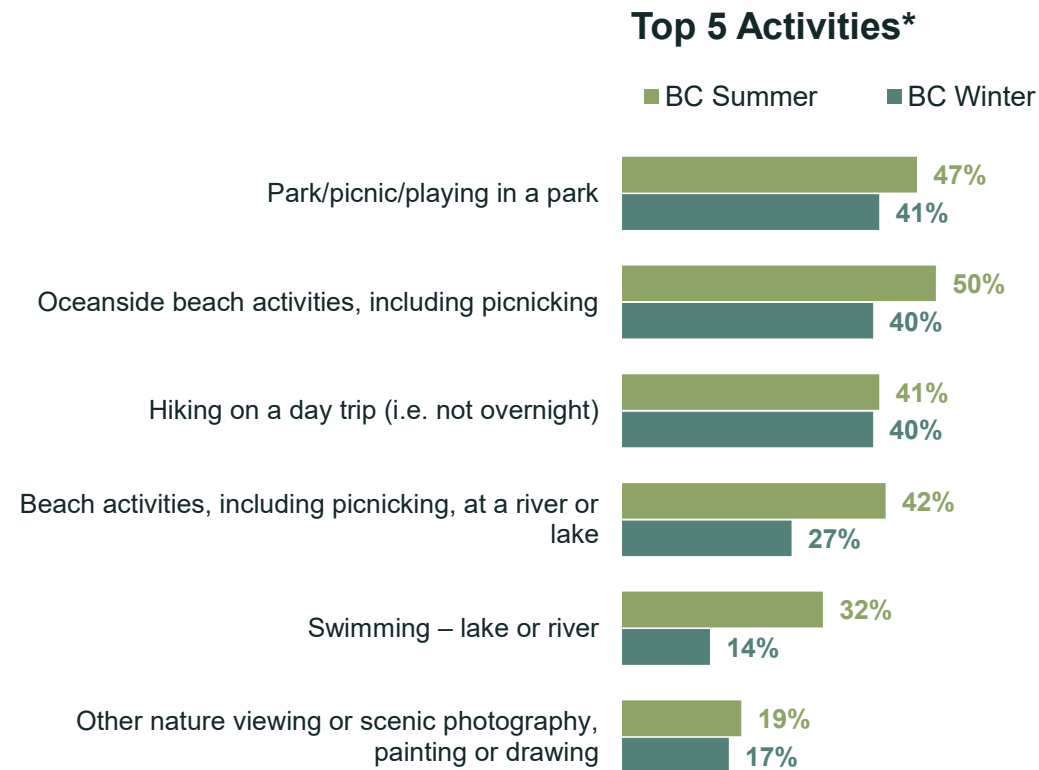
The difference in participation between summer and winter varies by region. Overall participation saw a 10-point decline between summer and winter. The largest declines between seasons were in the Cariboo Chilcotin Coast (-18 points), Thompson Okanagan (-17 points), and Kootenay Rockies (-17 points). In contrast, Vancouver, Coast & Mountains only saw an eight-point decline in participation between summer and winter.



3. Key Findings: Participation by Tourism Region (BC ONLY)

Vancouver Island

The top activities for Vancouver island residents are consistent between summer and winter, with some exceptions. The top four activities are consistent with some variation in order, and include park/picnic/playing in a park, oceanside beach activities (including picnicking), hiking on a day trip, and beach activities (including picnicking at a river or lake). The fifth most common activity during the summer is swimming (lake or river); in the winter, it's other nature viewing or scenic photography, painting, or drawing.



3. Key Findings: Participation by Tourism Region (BC ONLY)

Vancouver, Coast & Mountains

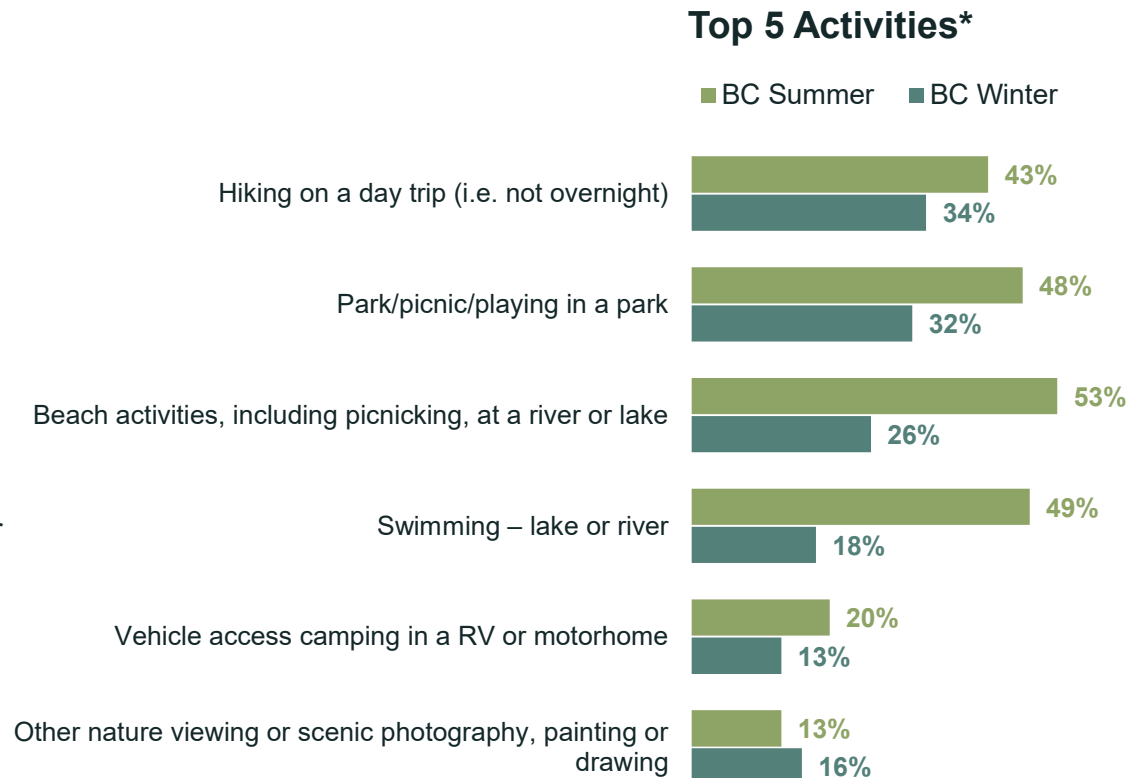
Similar to Vancouver island, the top five activities for Vancouver, coast & mountain residents are consistent between summer and winter, except for the fifth most popular activity. Park/picnic/playing in a park, hiking on a day trip, oceanside beach activities (including picnicking), and beach activities (including picnicking at a river or lake) comprise the top four activities. The fifth most common activity during the summer is swimming (lake or river); in the winter, it's trail running.



3. Key Findings: Participation by Tourism Region (BC ONLY)

Thompson Okanagan

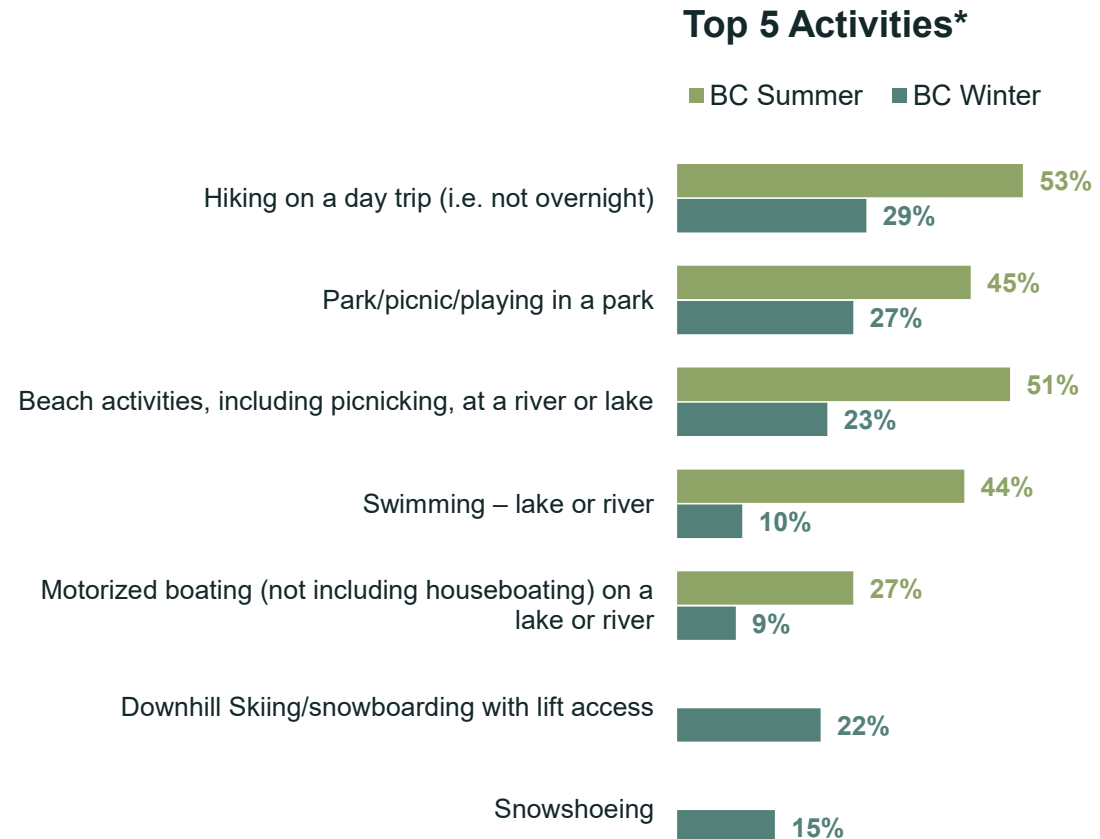
Like other regions, the top five activities for Thompson Okanagan residents are relatively consistent across summer and winter except for the fifth most popular activity. Hiking on a day trip, park/picnic/playing in a park, beach activities (including picnicking at a river or lake), and swimming (lake or river) comprise the top four activities. The fifth most common activity during the summer is vehicle access camping in an RV or motorhome; in the winter, it's other nature viewing or scenic photography, painting, or drawing.



3. Key Findings: Participation by Tourism Region (BC ONLY)

Kootenay Rockies

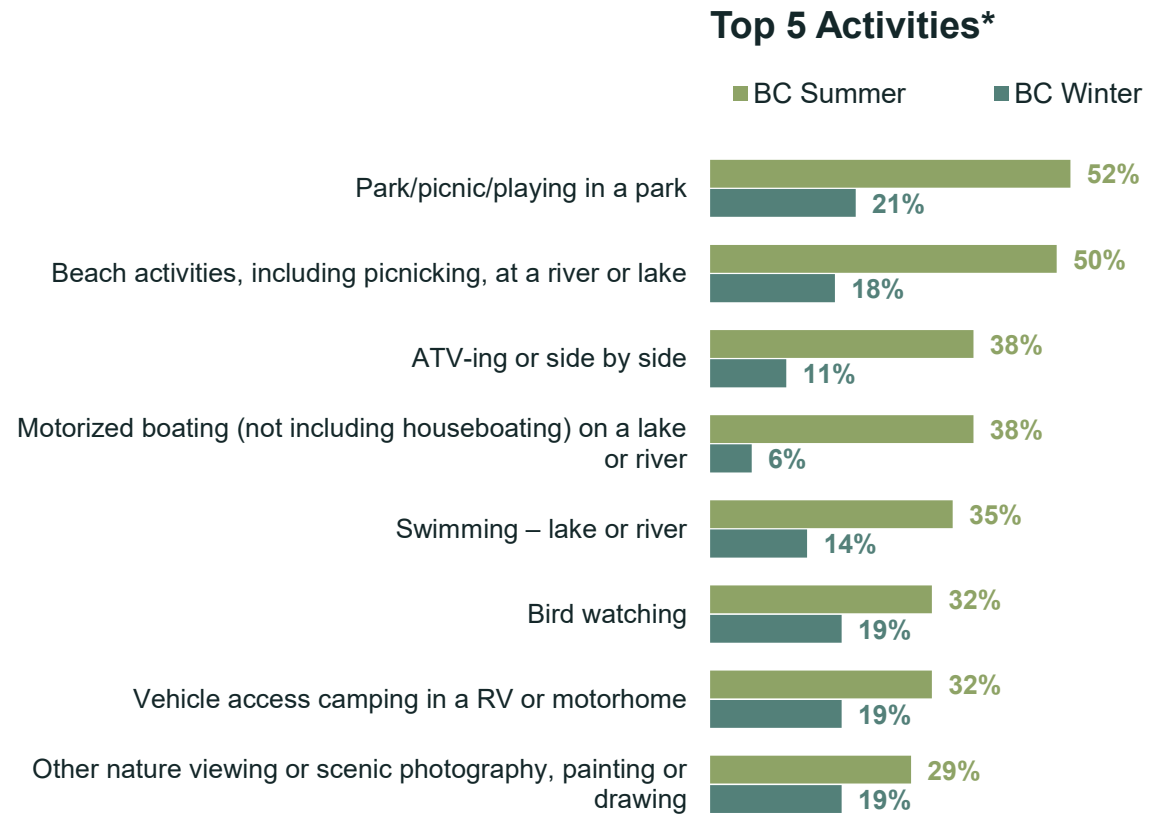
The top activities for Kootenay Rockies residents show more variation than other regions between summer and winter. The top three activities, though in different order between summer and winter, include hiking on a day trip, park/picnic/playing in a park, and beach activities (including picnicking at a river or lake). During the summer, swimming (lake or river) and motorized boating on a lake or river round out the top five. In winter, these are replaced by season-specific activities, with downhill skiing/snowboarding with lift access and snowshoeing ranking fourth and fifth, respectively.



3. Key Findings: Participation by Tourism Region (BC ONLY)

Cariboo Chilcotin Coast

The top activities for Cariboo Chilcotin Coast residents, other than the most popular activity, differ between summer and winter. The top activity for both summer and winter is park/picnic/playing in a park, but activities vary after that. The activities rounding out the top five for summer consist of beach activities (including picnicking at a river or lake), ATV'ing or side-by-side, swimming (lake or river), and motorized boating on a lake or river. In contrast, the top winter activities are bird-watching, vehicle access camping in an RV or motorhome, other nature viewing or scenic photography, painting, or drawing, and beach activities (including picnicking at a river or lake).



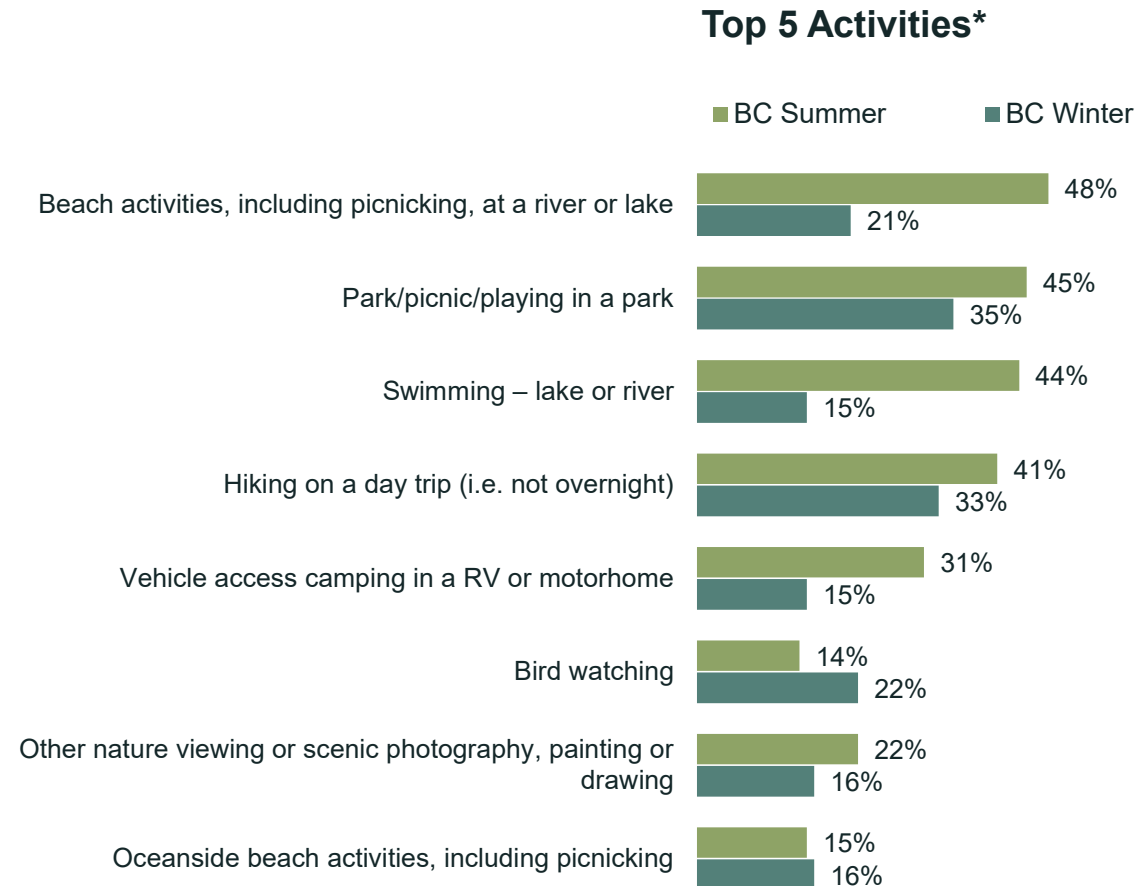
A1-A12, A13a. [study period], did you participate in any of the following activities in British Columbia, and if so, how many trips did you participate in total for each activity?
Base: All respondents.

3. Key Findings: Participation by Tourism Region (BC ONLY)

Northern BC

Similar to Cariboo Chilcotin Coast, northern BC residents have a notably different top five activity list between summer and winter. For summer, the top five activities are beach activities (including picnicking at a river or lake), park/picnic/playing in a park, swimming (lake or river), hiking on a day trip, and vehicle access camping in an RV or motorhome.

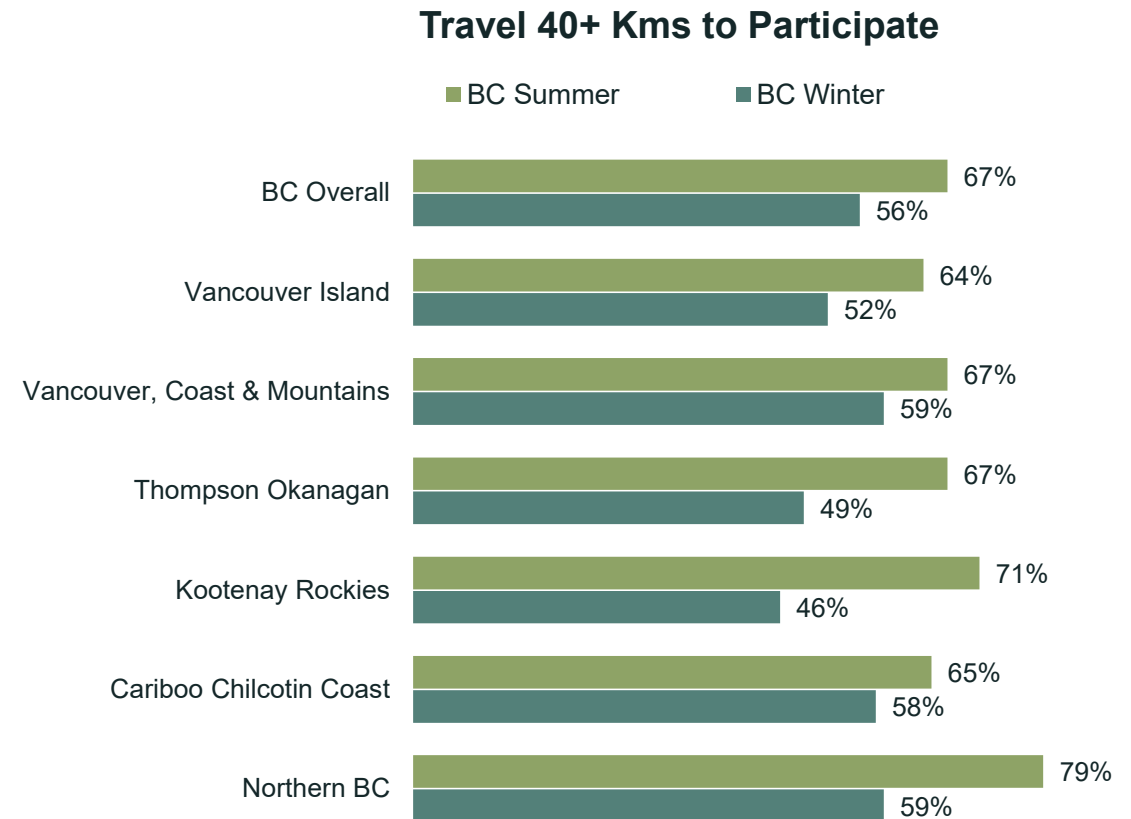
The top five activities in the winter are park/picnic/playing in a park, hiking on a day trip, bird-watching, oceanside beach activities (including picnicking), and other nature viewing or scenic photography, painting, or drawing.



3. Key Findings: Participation by Tourism Region (BC ONLY)

The proportion of participants who travelled 40 kilometers or more from their community within BC (“travellers”) decreased from 67% in summer 2022 to 56% in winter 2022–2023. Not surprisingly, all regions see a lower proportion of travellers in the winter than summer season.

Northern bc resident participants are most likely to be “travellers.” This is not surprising, given the vast geographical spread of the region. The Kootenay Rockies experiences the second-highest level of travel in the summer (71%), but is replaced by Vancouver, Coast & Mountains in the winter (59%).



A16a [study period], for each of the following outdoor recreation activities you participated in, did you travel outside of your community (40 km or more) within British Columbia?

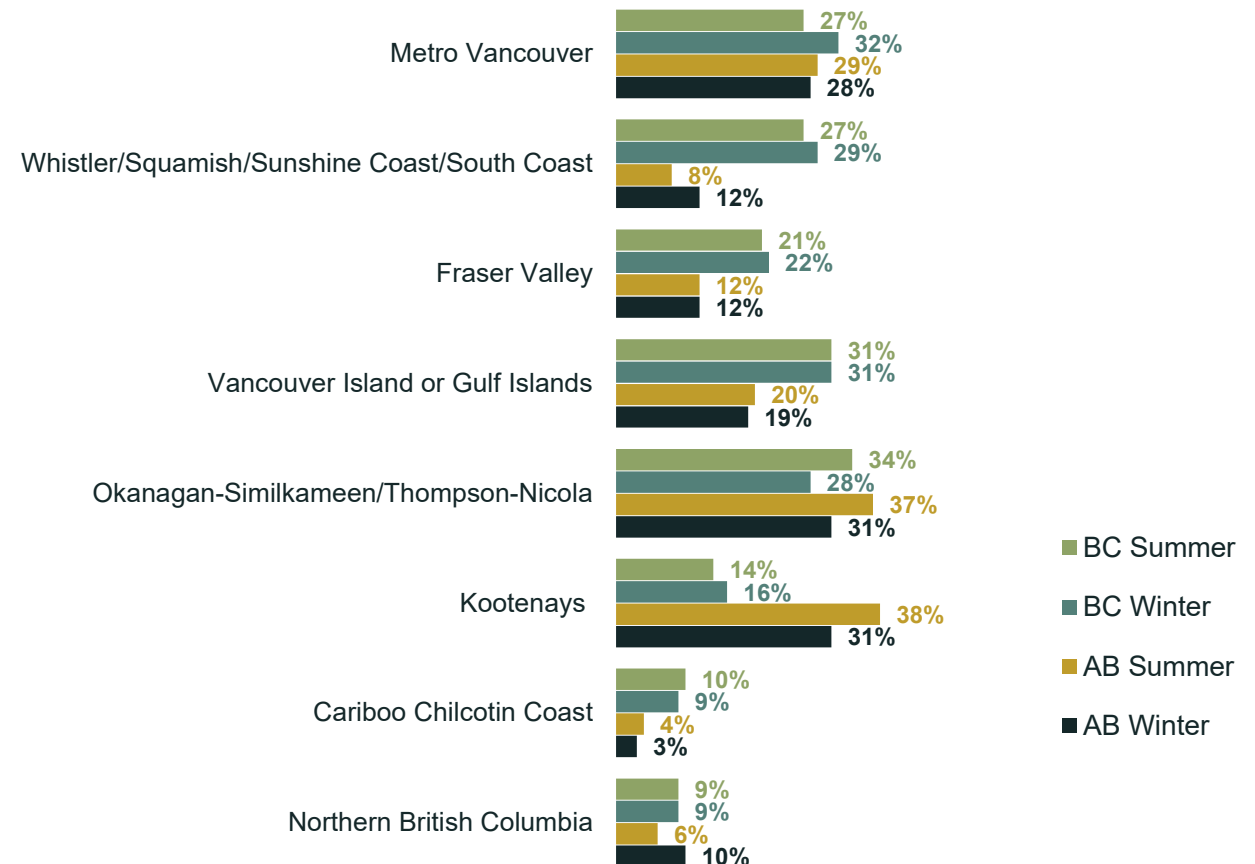
Base: All outdoor recreation participants.

3. Key Findings: Participation by Tourism Region (BC ONLY)

BC resident participants who travel over 40 kilometres for an overnight trip most commonly visit the Okanagan-Similkameen/Thompson-Nicola (34% summer, 28% winter), Vancouver island or Gulf Islands (31% in both summer and winter), Metro Vancouver (27% summer, 32% winter), and Whistler/Squamish/Sunshine Coast/South Coast (27% summer, 29% winter). Despite some shifts in region across seasons, the differences are not statistically significant.

Given the proximity, it isn't surprising that Alberta visitors were more likely to visit the Kootenays during their last outdoor recreation trip in BC. Similarly, Alberta visitors are notably less likely to visit Vancouver island or the Gulf Islands, Whistler/Squamish/Sunshine Coast/South Coast, and the Fraser Valley.

Regions/Areas Visited on Overnight OR Trip

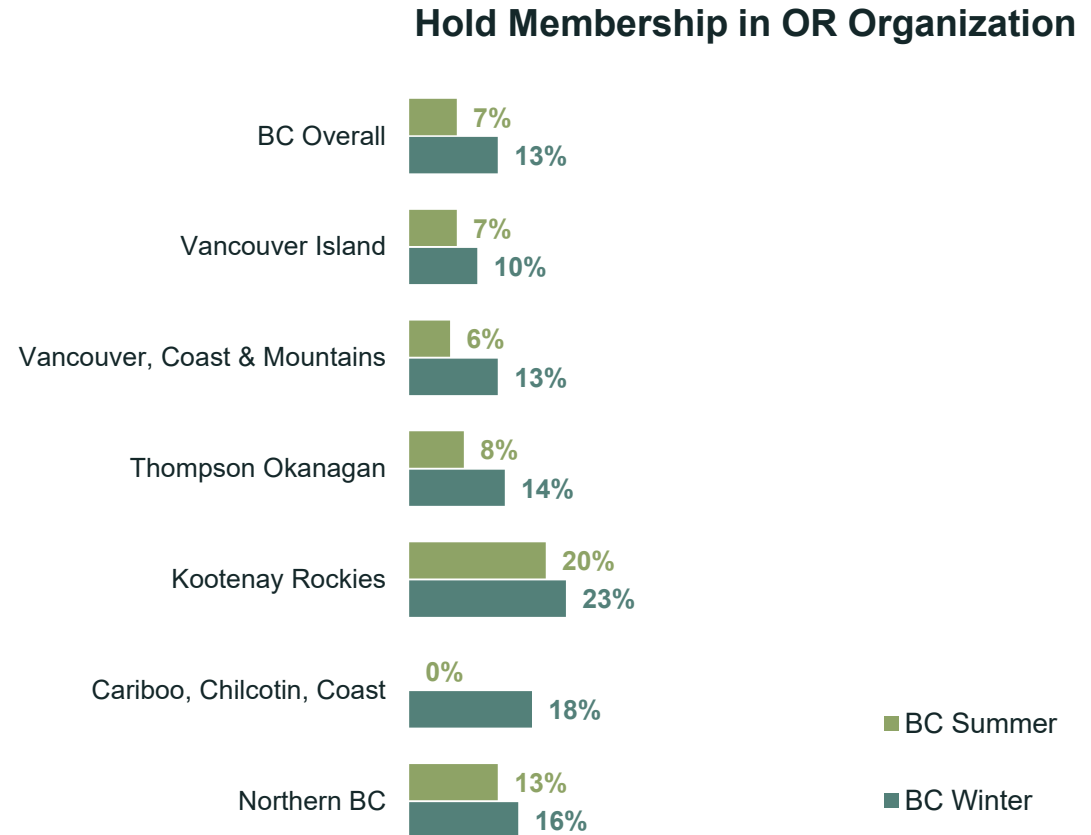


A19. For your overnight trips, where in British Columbia did you travel [study period]?
Base: All outdoor recreation participants who "travel" overnight during both seasons.

3. Key Findings: Participation by Tourism Region (BC ONLY)

Outdoor recreation participants in the Kootenay Rockies are the most likely to be members of outdoor recreation organizations. In addition, participation levels in the region remain consistent across both summer and winter.

In contrast, most other regions experience variability in membership between summer and winter. Most notable is the Cariboo Chilcotin Coast, which had no membership in summer 2022, but increased to 18% in winter 2022–2023. In Vancouver, Coast & Mountains, membership increased from 6% in the summer to 13% in the winter.

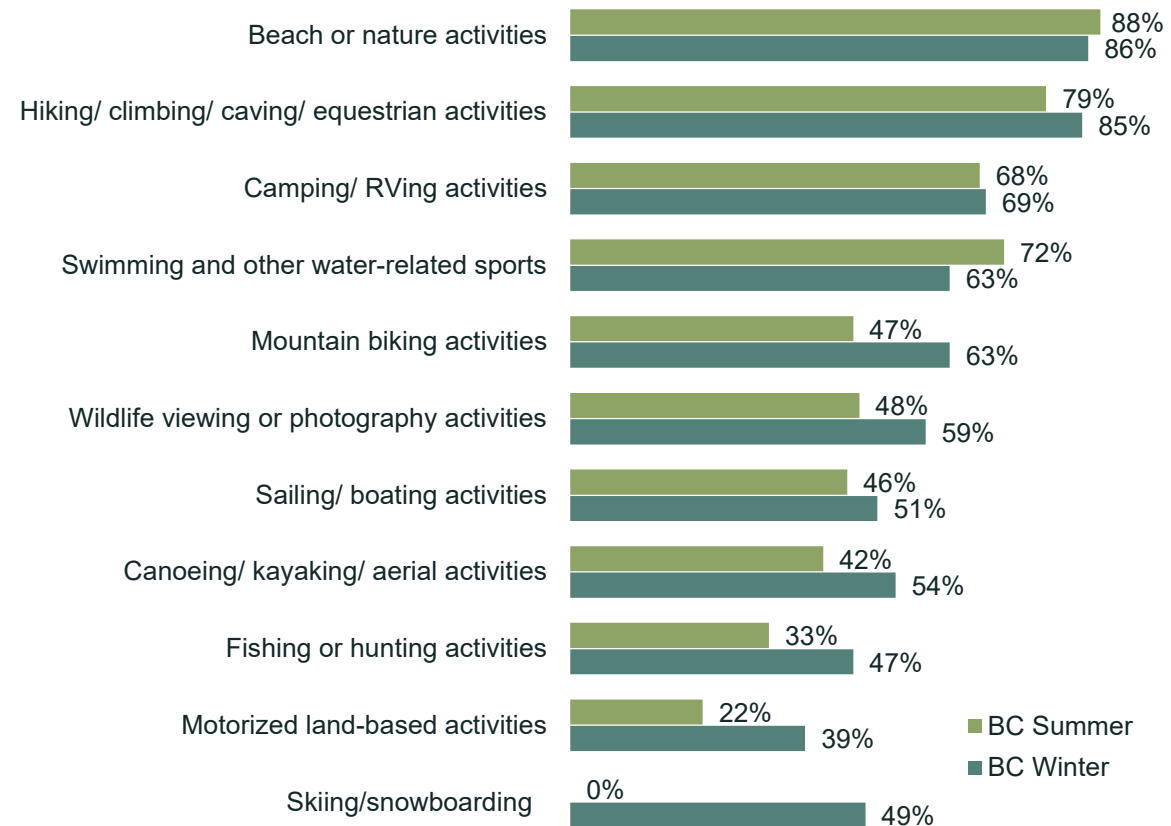


4. Key Findings: Heavy Participant Profile (BC ONLY)

Heavy users demonstrate seasonal differences in participation by activity group. Heavy users in the summer, not surprisingly, are notably more likely to participate in swimming and other water-related activities than during the winter (72% vs. 63%).

Interestingly, heavy users are more likely to participate in many of these activity categories during the winter than the summer. This is particularly true for motorized land-based activities (increased from 22% in summer to 39% in winter), mountain biking activities (increased from 47% in summer to 63% in winter), and fishing or hunting activities (increased from 33% in summer to 47% in winter).

Heavy User Participation by Groupings



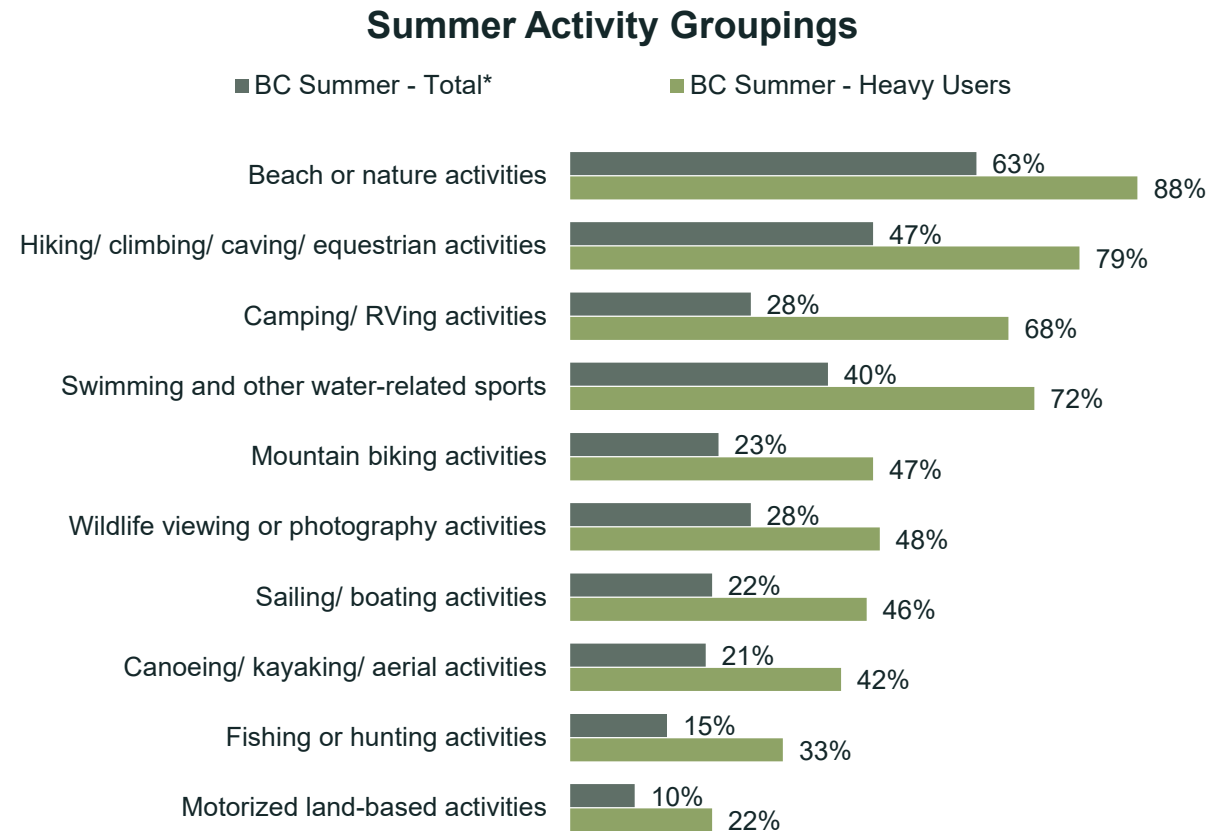
4. Key Findings: Heavy Participant Profile (BC ONLY)

Heavy users in the summer season are more likely than general outdoor recreation participants to participate in all activity types.

As with all participants, beach or nature activities are most common; however, 88% of heavy users participate in these activities, compared to 63% overall.

Hiking/climbing/caving/equestrian is the second-most popular activity category, with 79% partaking (vs. 47% overall). Swimming and other water-related sports rounds out the top three with 72% of heavy users participating in these activities (vs. 40% overall).

The camping/RVing activity grouping has the largest uptick (up 40 points) to 68% of heavy users vs. 28% overall.



A1-A12, A13a. [study period], did you participate in any of the following activities in British Columbia, and if so, how many trips did you participate in total for each activity?

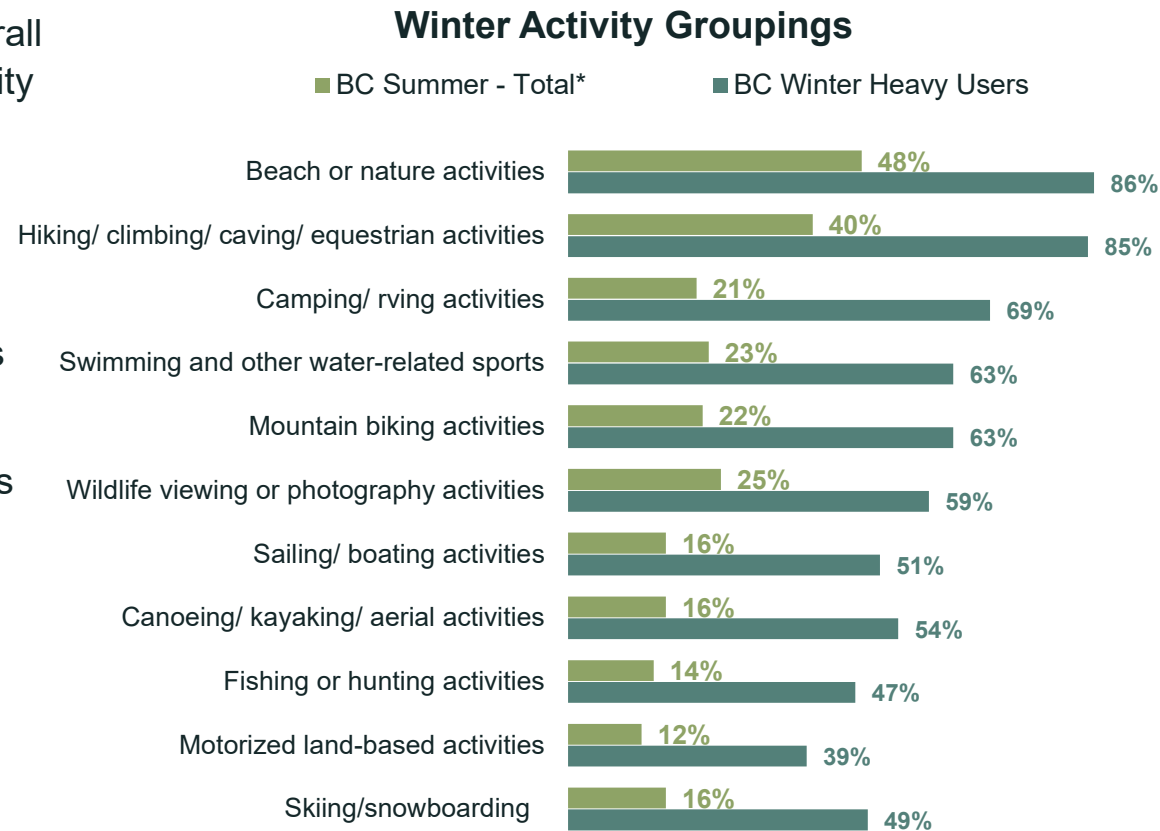
Base: BC Summer Total =All respondents, BC Summer- Heavy Users = Heavy Users.

4. Key Findings: Heavy Participant Profile (BC ONLY)

As we expect, heavy users are more likely than overall outdoor recreation participants to partake in all activity groupings in the winter season as well as summer.

The top three activity types for heavy users in the winter are: beach or nature activities (86% vs. 48% overall), hiking/climbing/caving/equestrian activities (85% vs. 40% overall), and camping/RVing activities (69% vs. 21% overall).

Skiing/snowboarding, a winter-only category, attracts 49% of heavy users—significantly higher than the overall participation rate of 16%.



A1-A12, A13a. [study period], did you participate in any of the following activities in British Columbia, and if so, how many trips did you participate in total for each activity?





Base: BC Winter Total =All respondents, BC Winter Heavy Users = Heavy Users.

4. Key Findings: Heavy Participant Profile (BC ONLY)





Interestingly, heavy winter users are not as likely as general outdoor participants to categorize themselves as very experienced (24% of heavy users vs. 35% of OR participants in winter). There are other differences as well. Heavy outdoor recreation participants are notably more likely than outdoor recreation participants overall to be:

- Younger (35% of summer and 49% of winter heavy users are 18-34, compared to 25% and 26%, respectively, of all outdoor recreation participants)
- More educated (heavy users are more likely to hold a graduate or post-graduate degree - 34% vs. 26% among all users in summer, and 38% vs. 25% in winter).
- Living in a household with children under 18 years (26% vs. 19% in summer, and 37% vs. 22% in winter)
- A member of an outdoor recreation organization (12% vs. 7% in summer, and 29% vs. 13% in winter)
- A user of all land types, particularly designated parks (68% vs. 51% in summer, and 66% vs. 45% in winter) and recreation sites and trails (59% vs. 41% in summer, and 62% vs. 39% in winter)
- Looking for a challenge or excitement (66% vs. 55% in summer, and 75% vs. 57% in winter)

4. Key Findings: Heavy Participant Profile (BC ONLY)

	 BC Summer <u>All OR Participants</u>	 BC Summer <u>Heavy Users</u>	 BC Winter <u>All OR Participants</u>	 BC Winter <u>Heavy Users</u>
Age				
18–34	25%	35%	26%	49%
35–54	24%	34%	32%	34%
55+	50%	31%	42%	18%
Graduate/ Postgrad Degree	26%	34%	25%	38%
Children (<18) in Household	19%	26%	22%	37%
Participated in OR on:				
Designated Park	51%	68%	45%	66%
BC Recreation Sites & Trails	41%	59%	39%	62%
Other Crown Land	22%	31%	24%	43%
Private Property	26%	36%	26%	42%

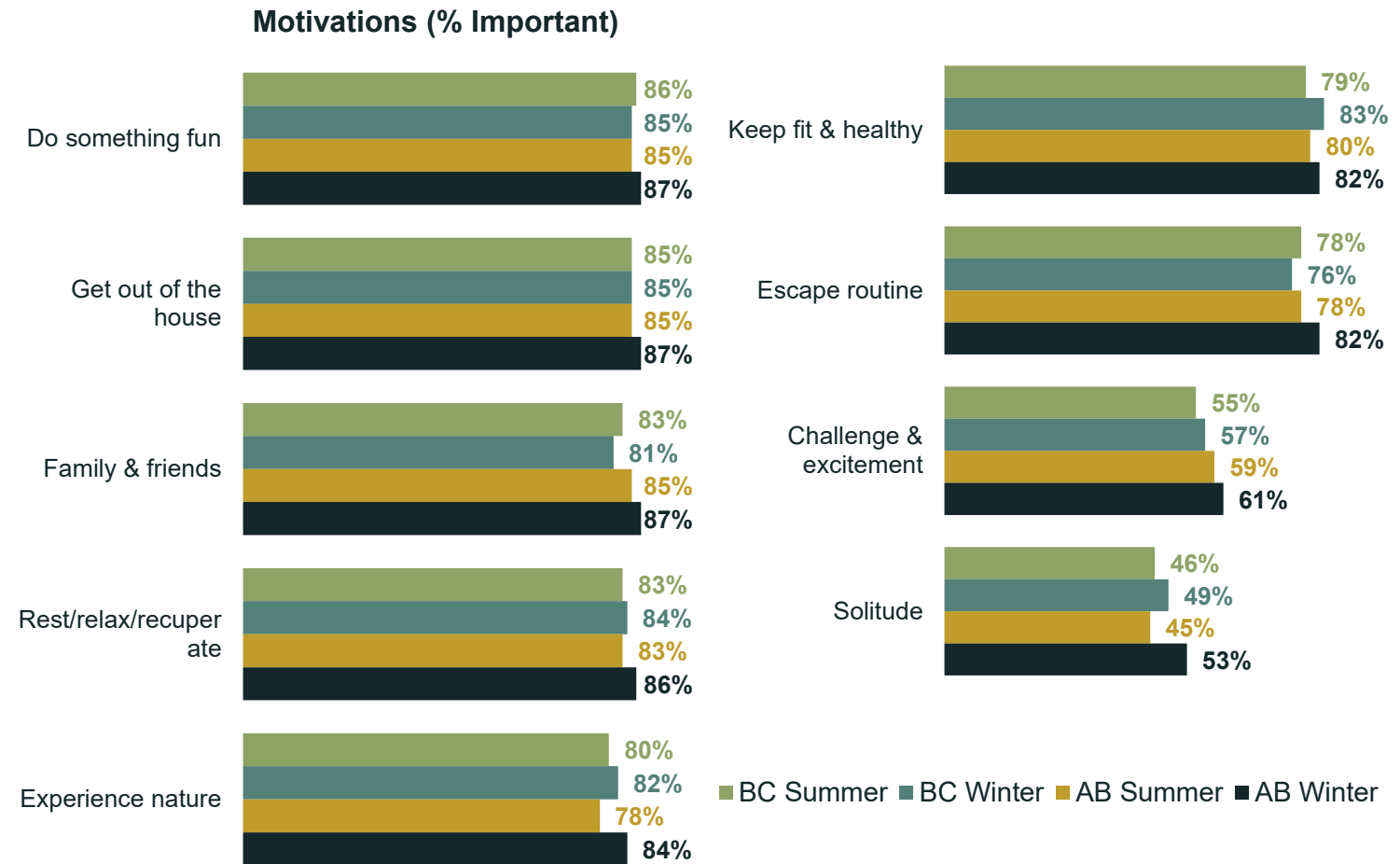
4. Key Findings: Heavy Participant Profile (BC ONLY)

	 <u>BC Summer All OR Participants</u>	 <u>BC Summer Heavy Users</u>	 <u>BC Winter All OR Participants</u>	 <u>BC Winter Heavy Users</u>
Favourite thing to do	30%	42%	34%	50%
OR is important to them	54%	65%	58%	68%
Holds an OR Membership	7%	12%	13%	29%
Very experienced in OR	37%	39%	34%	24%
Importance of challenge/ excitement	55%	66%	57%	75%
Proximity to OR has an impact on where they live	54%	60%	60%	71%

5. Key Findings: Social Value of Outdoor Recreation

Participants are motivated to partake in outdoor recreation for a variety of reasons. The top reasons of doing something fun and getting out of the house don't tend to vary by market or season. That said, some appear to be more influenced by season. For example, keeping fit and healthy is higher in winter than summer. Escaping routine, experiencing nature, and solitude are more likely to be motivators for Albertans during wintertime.

The social element of “family and friends” is the third most important factor for BC resident participants (83% summer and 81% winter) and Alberta visitors (85% summer and 87% winter).

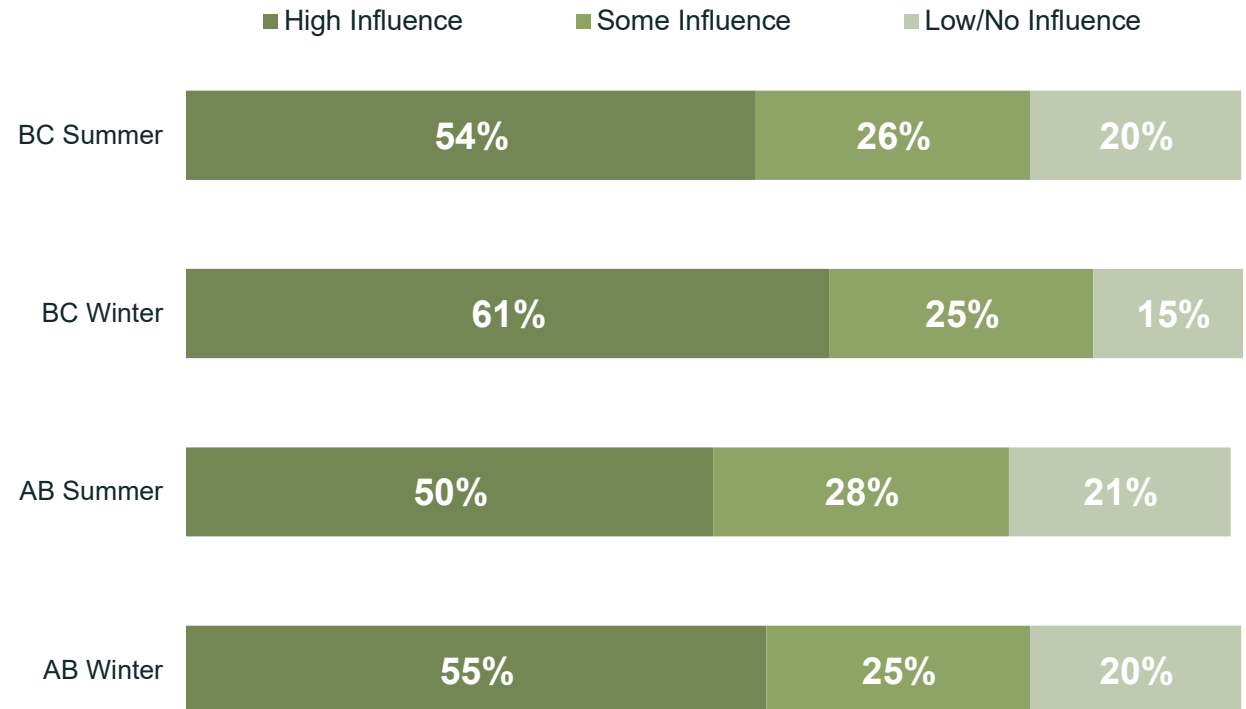


5. Key Findings: Social Value of Outdoor Recreation

Outdoor recreation has an impact on where people live. Over half of BC resident participants and Alberta visitors report that the proximity of outdoor recreation highly influences where they choose to reside.

Winter outdoor participants appear to be more influenced by the proximity of outdoor recreation when choosing where to live than their summer participant counterparts. In fact, 61% of BC winter participants say proximity is a high influence, which is significantly higher than BC summer participants (54%). Alberta visitors follow the same seasonal pattern; however, the difference is not statistically significant.

Influence on Where Reside (% Important)





Summary

Summary

Participation in outdoor recreational activities:

- Participation in outdoor recreation is strong, but varies between summer (79%) and winter (69%) for BC residents.
- Alberta visitors to BC have higher participation rates in outdoor recreation than BC residents. Also, their participation is more consistent between seasons.
- The main reasons for not participating in outdoor recreation are health or physical limitations, motivation, and cost.
- The most common outdoor recreation activities tend to be “soft” activities, including park/picnic/play in a park, hiking on a day trip (i.e., not overnight), beach activities at a river/lake, oceanside beach activities, and swimming at a lake/river.
- The most common land types used for outdoor recreation are designated parks, followed by BC recreation sites and trails.
- Participation levels in outdoor recreation are relatively consistent across regions with the exception of the Cariboo Chilcotin Coast, which has notably lower participation levels in both summer and winter.
- The proportion of OR Participants who are “travellers” is high, but does appear to dip in the winter. The largest declines—not surprising, given the more extreme nature of weather in these areas—are in the Kootenay Rockies (-25 points) and Northern BC (-20 points).

Summary

- The areas OR participants visit on an overnight OR trip vary between BC and Alberta visitors. Alberta visitors are notably more likely to visit the Kootenays, while BC resident participants are notably more likely to visit Whistler/Squamish/Sunshine Coast/South Coast, and Vancouver Island or Gulf Islands.
- The majority of BC outdoor recreation participants consider themselves to be casual participants, while roughly one-third say it is their favorite thing to do.
- Heavy users are more likely to participate on all land types, seek a challenge/excitement, have kids in their households, and note that outdoor recreation is their favourite thing to do.
- Immediate family members are the most common companions for outdoor recreation activities.

Motivations and social value of outdoor recreation:

- People partake in outdoor recreation for a variety of reasons, the most common of which are to have fun and get out of the house.
- Few outdoor recreation participants hold memberships in outdoor recreation organizations. However, memberships appear to increase in winter, at least among BC residents. Membership is notably higher for Kootenay Rockies residents.
- Over half of participants feel that outdoor recreation is important and that it has influenced where they choose to live.



Research conducted by:

Leger

Report prepared by:

//ALIGN
CONSULTING GROUP



Niut Range | Kari Medig