











# Resident Perceptions of British Columbia's Tourism Industry

Research & Analytics | 2023 Survey

**KOOTENAY ROCKIES**  
Kaslo | Ashley Voykin

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# Objectives and Methodology

THOMPSON OKANAGAN  
Mount Robson Provincial Park | Megan McLellan

# Background & Objectives



Destination BC has conducted an annual Residents Perceptions of Tourism survey for the past several years. The survey of BC residents tracks and monitors their perceptions of the tourism industry on a community and provincial level. The insights from the study help inform Destination BC's Globally Competitive Tourism Ecosystem strategy which is one of three strategic levers outlined in the organization's 2023-2025 Corporate Strategy.

The key research objectives are to:

1. Identify how the tourism industry is perceived when it comes to being a contributor to new jobs and economic activity in local communities and in BC.
2. Determine how important the tourism industry is perceived to be to the well-being of local communities and BC.

3. Measure perceptions of the economic, social/cultural, and environmental impacts tourism has in local communities and in BC.

4. Gauge resident attitudes toward tourism volume in their communities and in BC during each season.

While the survey represents all tourism regions in BC, community-level partners had the opportunity to increase their regional sample sizes and/or add custom questions to the survey. Survey results for the partners who participated in the 2023 survey in this way have been presented under a separate cover.

# Methodology



- 4,684 online surveys were conducted with BC residents aged 18 and older using online consumer panels. To qualify for the survey residents had to be able and willing to identify the region of the province where they live. Also, no more than 10% of the total sample could be employed in the tourism industry (in this 2023 survey, 2% indicated they worked in the tourism industry).
- Data collection took place from November 2 to 23, 2023. The survey took an average of six (6) minutes to complete.
- A stratified sampling plan was employed by tourism regions and sub-regions to ensure adequate sample sizes for analyses. The final survey data was then mathematically weighted by tourism region, age, and gender to ensure it was an accurate reflection of the BC resident population aged 18 and older.
- The table to the right shows the final sample sizes achieved by tourism region and the associated margins of error at the 95% level of confidence.
- Where possible in this report, 2022 results have been shown. When comparing 2023 to 2022 findings on the total samples (4,684 in 2023 and 3,806 in 2022) a difference of at least +/-2 percentage points is required for that difference to be considered statistically significant.
- The results by tourism region can be found in the Appendix to this report, as can the sample sizes for each tourism subregion.

2023 Sample Sizes by Tourism Region & Associated Margins of Error (MOE)

Tourism Region	Surveys Completed	MOE
Vancouver, Coast & Mountains	2,685	±2.0%
Vancouver Island	810	±3.7%
Thompson Okanagan	705	±4.0%
Kootenay Rockies	215	±7.2%
Northern BC	208	±7.3%
Cariboo Chilcotin Coast	61	±13.5%
<b>Total</b>	<b>4,684</b>	<b>±1.5%</b>

# Highlights

KOOTENAY ROCKIES  
Fernie Alpine Resort | Ryan Creary

# Highlights



## The Economic Contribution of Tourism is Recognized & Valued

BC residents continue to value the impact that tourism has on their communities. Performance remains strong on the overall measures.

**72%** agree tourism contributes positively to the quality of life of their community

**75%** agree the positive impacts of tourism in their community outweigh the negative impacts

Residents place especially high value on the economic benefits of tourism for their communities.



**80%** value the contribution visitors make to their local economy

The extent to which residents value the economic contribution of visitors to the local economy is the strongest driver of whether they feel that tourism positively impacts the quality of life in their communities *and* whether the positive impacts of tourism outweigh the negative impacts.

Residents strongly link tourism with the diversity of amenities that exist in their communities (e.g., restaurants, attractions, recreation facilities, events).

However, they don't strongly link tourism with other additional infrastructure improvements like better water and sewage systems or upgrades to highways and roads. Based on this, more communication about the link between tourism and infrastructure improvements could lead to further increases in resident support for tourism.



**78%** agree tourism supports a greater diversity of amenities



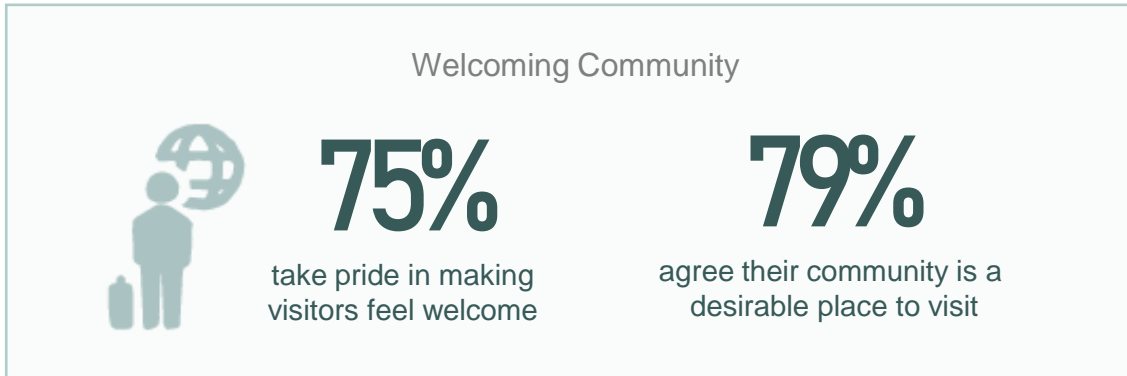
**48%** agree tourism supports additional infrastructure services

# Highlights



## Residents Take Pride in their Communities as Tourism Destinations

Residents take pride in what their communities offer visitors and are ready to welcome visitors of diverse backgrounds and cultures.



However, residents don't always feel that their communities have enough infrastructure, services, and amenities to serve visitors with disabilities. Residents with disabilities are the most likely to feel that their community lacks infrastructure to support those with disabilities.

Residents' perceptions of the tourism industry's commitment to sustainability are less strong than their perceptions of visitors and the economic impact of tourism.

Relatively speaking, they give the strongest marks to the industry for using more locally produced good, services, and agricultural products than most other industries. However, only half of residents currently believe this to be the case.

Perceptions of the tourism industry when it comes to doing more to reduce carbon emissions and waste than other industries have a weaker association. Only two-in-ten residents currently believe this to be the case.



# Highlights



## The Ideal Number of Visitors Varies by Season and Region

Overall, most residents feel that their communities have just the right number of visitors in the spring and fall.



Perception of Amount of Tourism in each Season  
(% feel it's the right amount)



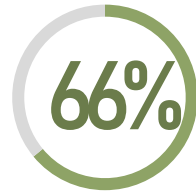
Winter  
(Dec – Feb)



Spring  
(Mar – May)



Summer  
(Jun – Aug)



Fall  
(Sep – Nov)

Attitudes are somewhat different for the winter and summer seasons. About one-third of residents (39%) feel that there are too few visitors in their communities in the winter and that there are too many visitors in their communities in the summer (35%).

These attitudes are tied strongly to region and subregion.

Residents in Northern BC and in the Cariboo Chilcotin region would like to see more visitors in the winter.

Residents in destinations like the Central Okanagan, the Capital region, and Downtown Vancouver are more likely than residents in other regions to feel that there are too many visitors in their communities in the summer.

The latter opinion influences how residents feel about the impact of tourism in their communities.

Residents who feel that there are too many visitors in their community in the summer are less likely to feel that tourism contributes to a positive quality of life in their communities, and to feel positive about their encounters with visitors.

# Overall Measures

NORTHERN BC  
Dune Za Keyih Provincial Park | Taylor Burk



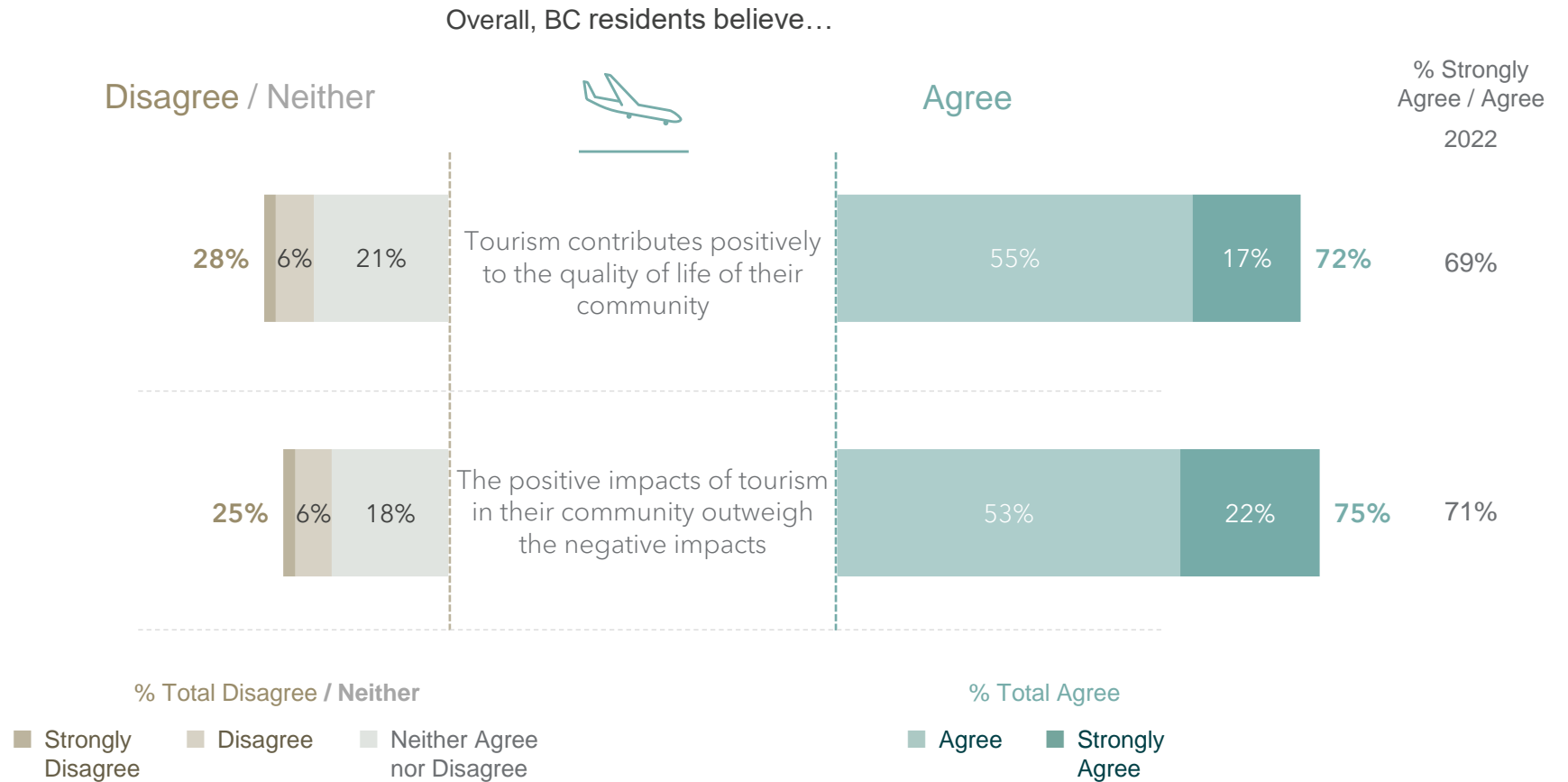
# BC TOURISM INDUSTRY Overall Measures



In line with 2022, strong majorities of BC residents consider tourism to contribute positively to their communities, as well as have more positive than negative impacts.

Residents aged 18 to 24 are less likely to consider tourism as having more positive than negative impacts (63% agreeing) while those aged 65 and older are the most likely to consider the positive impacts of tourism as outweighing the negative impacts (82%).

Persons with Disabilities and those who are LGBTQIP2SAA are less likely to consider tourism as having more positive than negative impacts (64% and 68%, respectively) compared to Racialized (75%) or Indigenous people (76%).



# Economic Impact

VANCOUVER, COAST & MOUNTAINS  
Stanley Park Seawall | Grant Harder



# BC TOURISM INDUSTRY Economic Impact



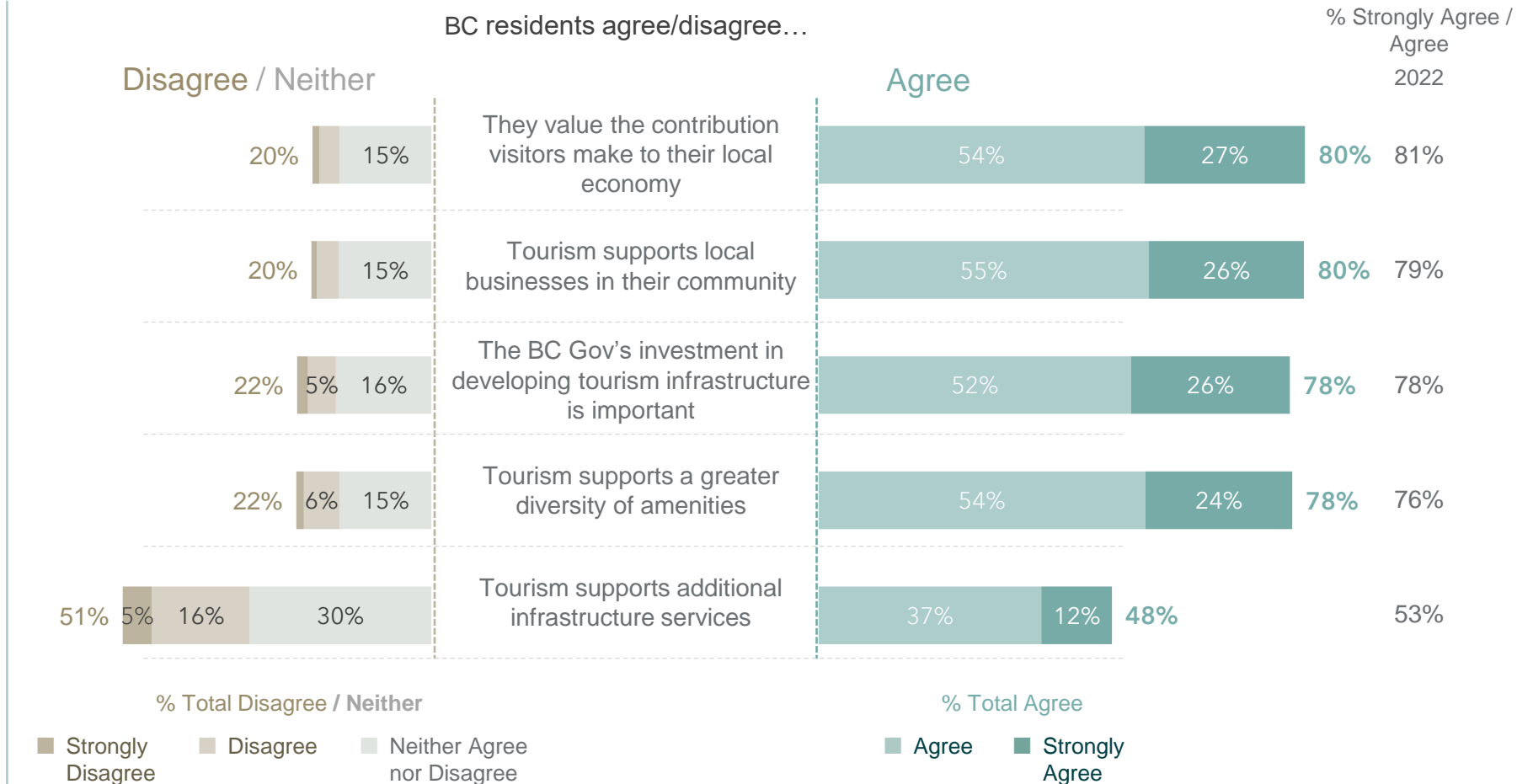
Residents continue to recognize that tourism has a positive economic impact on their community.

Eight-in-ten residents value the contribution that visitors make to the local economy and agree that tourism supports local businesses. Almost as many recognize that tourism increases the diversity of amenities (e.g., restaurants, attractions) in their community. It follows that the strong majority of residents consider the provincial government's investment in tourism as an important investment in their own community.

However, residents are much less likely to see tourism as contributing to local infrastructure like water and sewage systems and highways and roadways.

Those who are aged 18 to 24 are somewhat less likely than those in the older age groups to consider the provincial government's investment in tourism as important for their community (they are more likely to be undecided).

*continued onto the next slide...*





# BC TOURISM INDUSTRY Economic Impact cont'd



Resident perceptions of jobs and careers in the tourism industry continue to be low.

Only 36% feel that careers in tourism offer better opportunities than careers in other industries and just 17% believe that wages in the tourism industry are higher than they are in other industries. Those working in the tourism industry are more likely to feel that tourism offers better career opportunities (51%) than those not working in the industry (36%).

Those aged 18 to 24 are more likely than those in the older age groups to believe that wages in the tourism industry are higher than they are in other industries.



# Commitment to Sustainability

**CARIBOO CHILCOTIN COAST**  
Cariboo Mountain Range | Michael Bednar



# Commitment to Sustainability



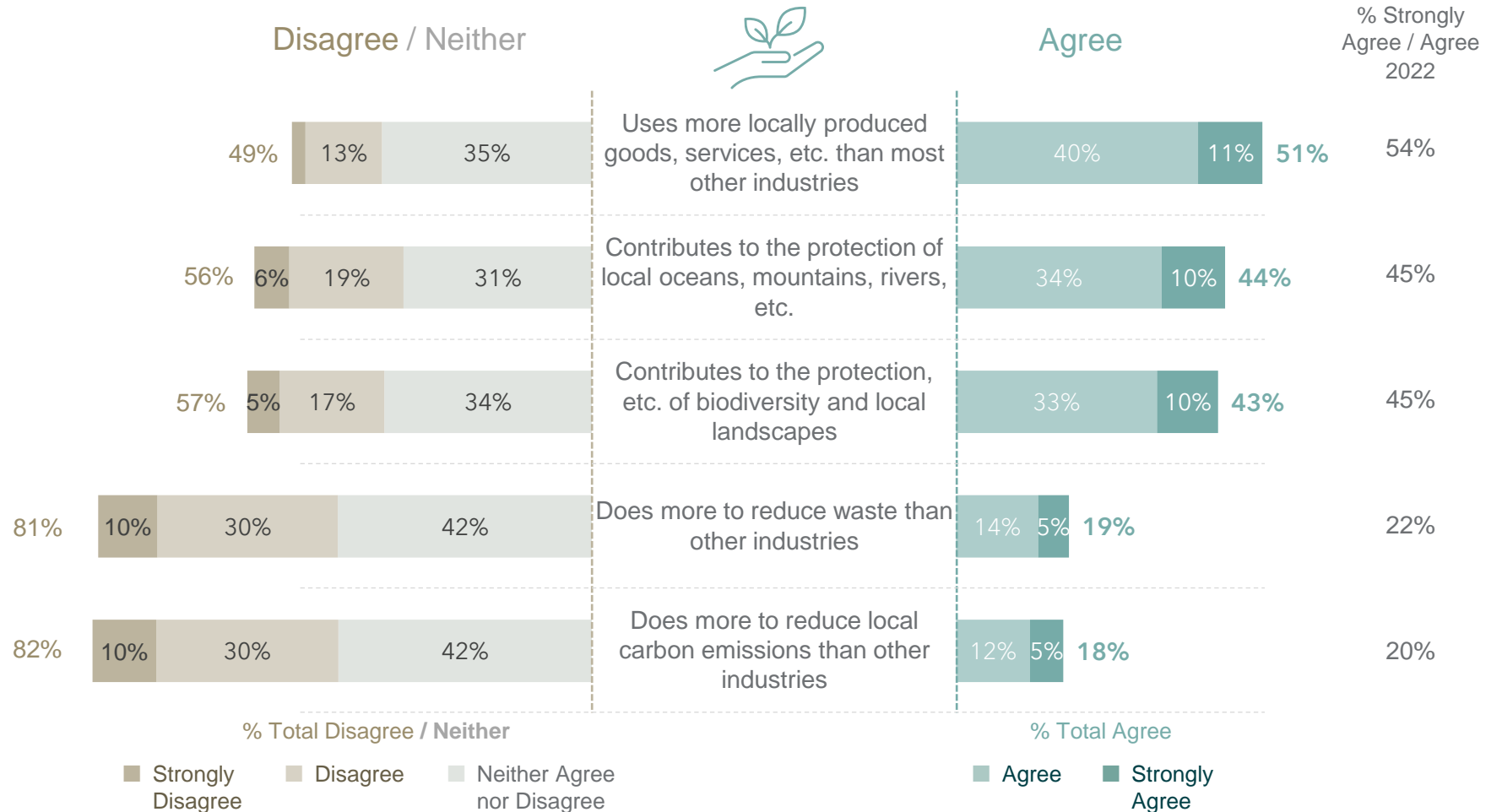
Perceptions of the tourism industry's commitment to sustainability range widely.

Residents give the highest marks to the industry for using more locally produced goods and services than other industries. They also give relatively favourable marks to the industry for contributing to the protection of nature. However, in each case, a substantial percentage of residents (31% to 35%) neither agree nor disagree that the industry makes these positive contributions.

Perceptions of what the industry is doing to reduce waste and carbon emissions are more negative. In fact, those who have a negative impression of the industry in these areas outnumber those who have a positive impression by a factor of 2 to 1.

Those aged 18 to 24 are more likely to have a positive impression of the industry in these areas compared to those in the older age groups.

## BC residents think the tourism industry...





# Welcoming Community

VANCOUVER ISLAND  
Cox Bay Beach | Brian Caissie



# BC TOURISM INDUSTRY Welcoming Community



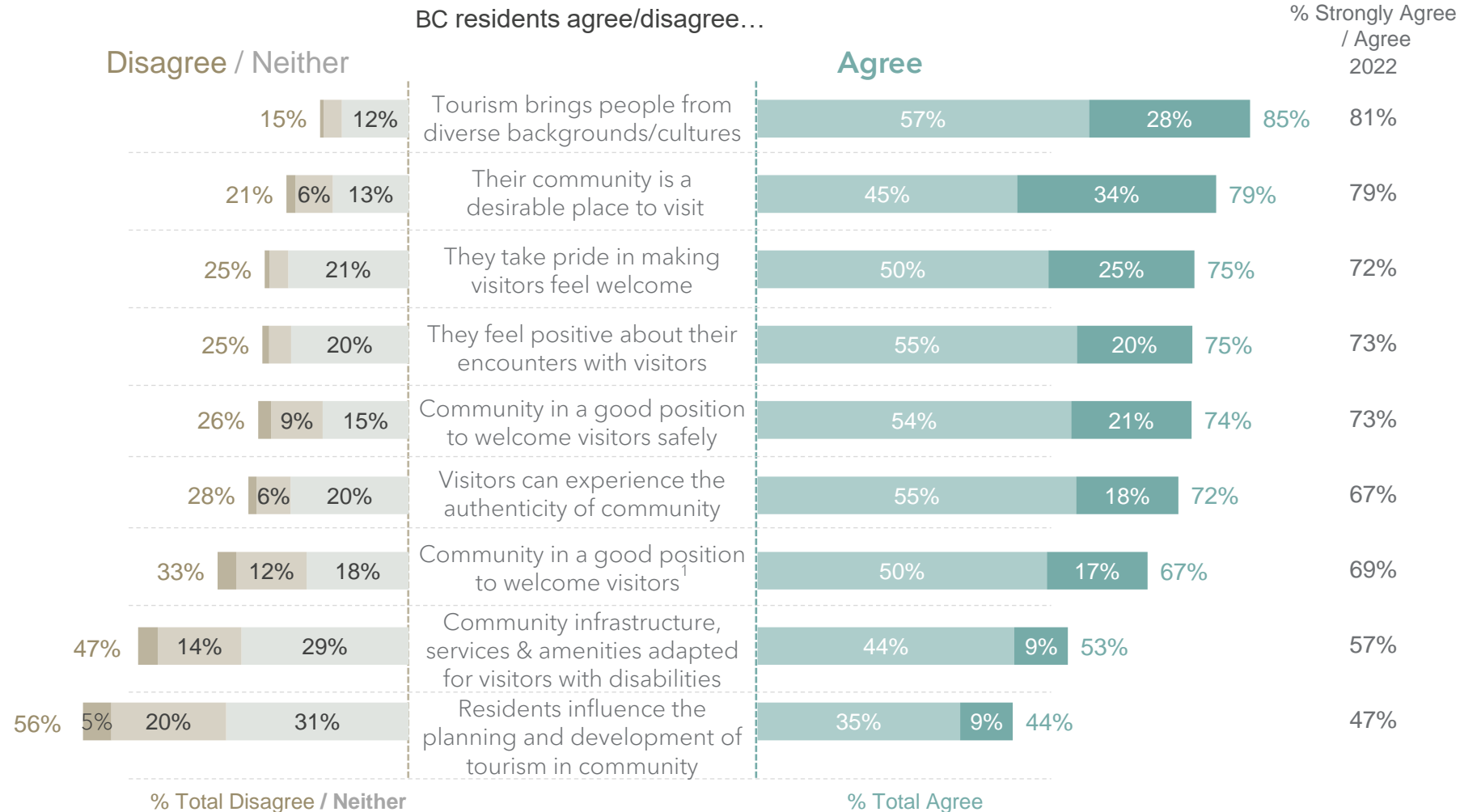
Residents take pride in what their community offers visitors and are ready to welcome them.

Residents feel particularly strongly that their community is a desirable place to visit, and that tourism brings visitors of diverse backgrounds and cultures to their community.

Residents are less likely, however, to see their community as being able to effectively welcome visitors with disabilities.

Also, only 44% feel that residents play a role in influencing the planning and development of tourism in their community.

Those aged 18 to 24 are less likely than those in the older age groups to feel that their community is a desirable place to visit.



■ Strongly Disagree ■ Disagree ■ Neither Agree nor Disagree ■ Agree ■ Strongly Agree

2023 Base: 4,324-4,665 / <sup>1</sup>infrastructure, accessibility, etc.

S1. 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?



# Perceptions of the Amount of Tourism



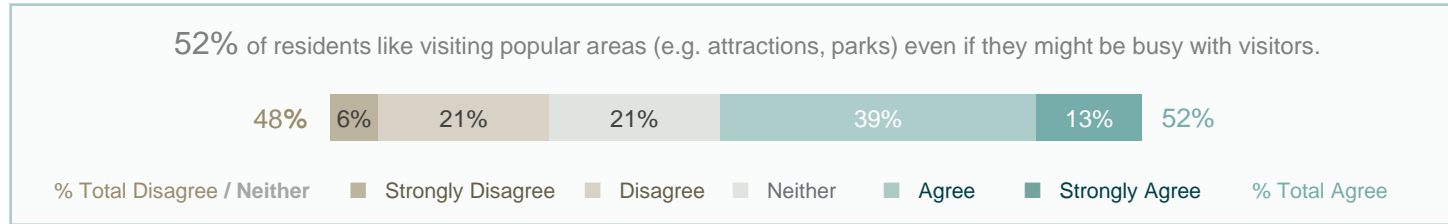
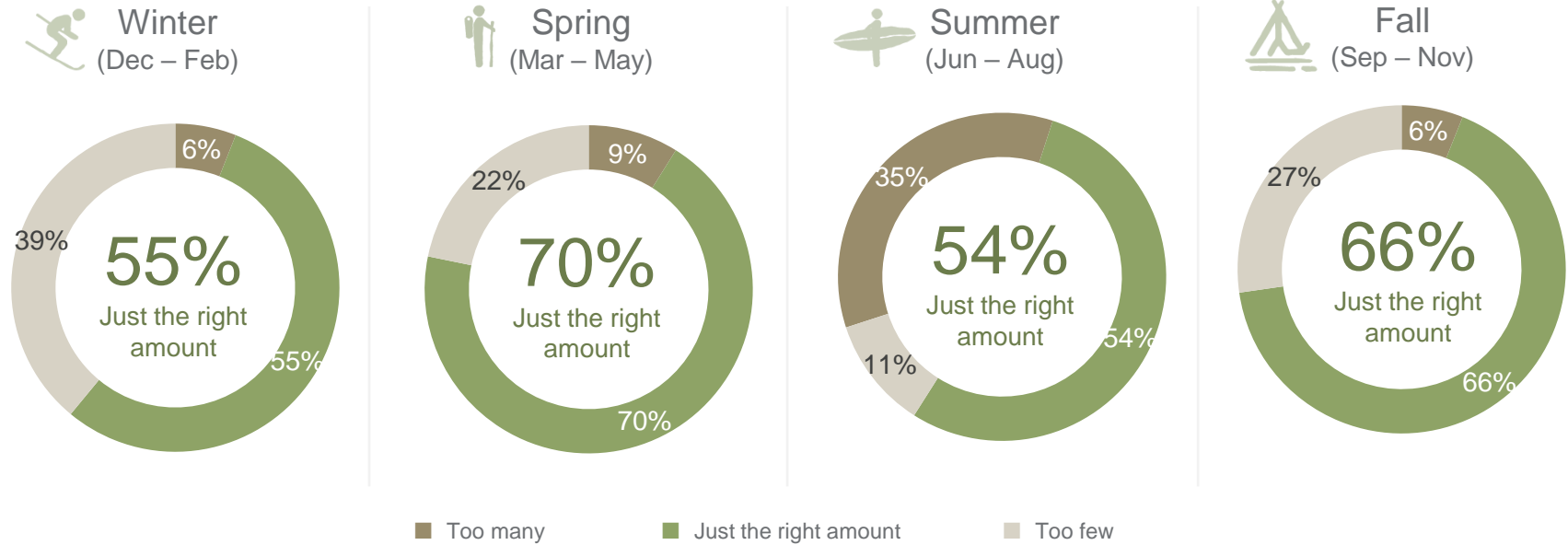
The amount of tourism residents would like to see in their community varies across seasons.

Attitudes are very similar in the spring and fall, with about 7-in-10 feeling that these seasons bring just the right amount of tourism to their community.

In the winter and summer there is less consensus. A substantial percentage of residents (39%) feel that there are too few visitors in their community in the winter months, while a substantial percentage of residents (35%) feel that the summer months bring too many visitors to their community.

Attitudes vary greatly by region and subregion, of course.

BC residents believe the amount of tourism in their community each season is....



2023 Base: 4,065-4,657

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

S1. 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?



# Consequences of Too Much Tourism



While residents appreciate the impact that tourism has on their communities, perceptions that there are too many visitors can have some unintended effects on attitudes towards community-level tourism.

The table on the right compares the attitudes of residents based on their perceptions of summer tourism volume in their community.

Compared to the other two groups, those who feel that there's too many visitors are much less likely to feel that tourism contributes to a positive quality of life in their community or that the positive impacts of tourism outweigh the negative impacts.

Based on this, they're also much less likely to feel positive about their encounters with visitors in their community, to take pride in welcoming visitors, or to feel that the tourism industry is doing a better job than other industries at conserving and protecting local nature.

Perceptions of Amount of Tourism in Community During Summer (Jun – Aug)

	Too many	Just the right amount	Too few
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Perceptions of BC Tourism Industry (% Strongly Agree / Agree)			
I take pride in making visitors feel welcome in my community	68%	83%	80%
I feel positive about my encounters with visitors in my community	64%	83%	81%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	63%	83%	80%
Overall, tourism contributes positively to the quality of life of my community	62%	81%	70%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	36%	51%	48%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	35%	49%	48%

■ Lower than other groups

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

# Equity Deserving Groups

THOMPSON OKANAGAN  
Myra Canyon | Grant Harder

# Equity Deserving Groups



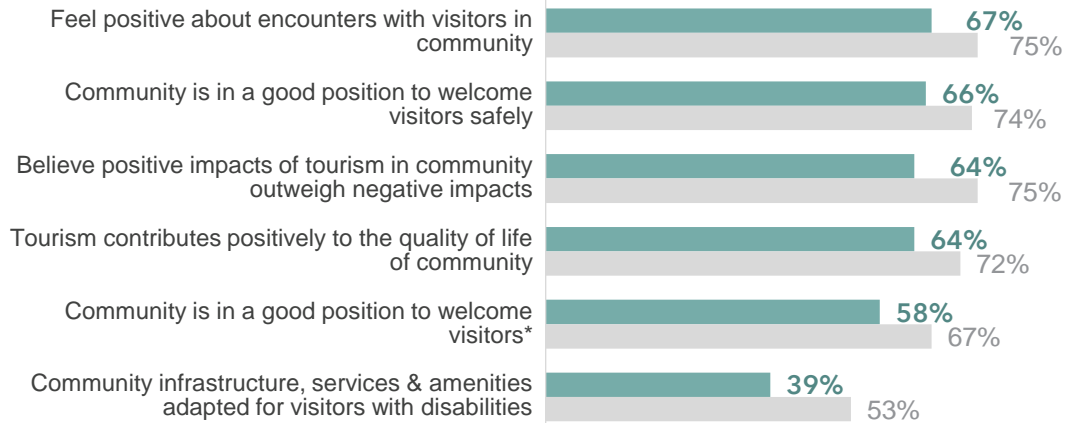
The charts below illustrate the areas where perceptions among equity deserving groups differ from the total BC population. Persons with Disabilities differ the most – they are less likely to feel positive about encounters with visitors in their community, less likely to feel that their community is ready to welcome visitors (or welcome them safely), and much less likely to view their community as having the infrastructure and services needed to serve visitors with disabilities.

Perception Differences By Equity Deserving Groups  
(% Strongly Agree / Agree)

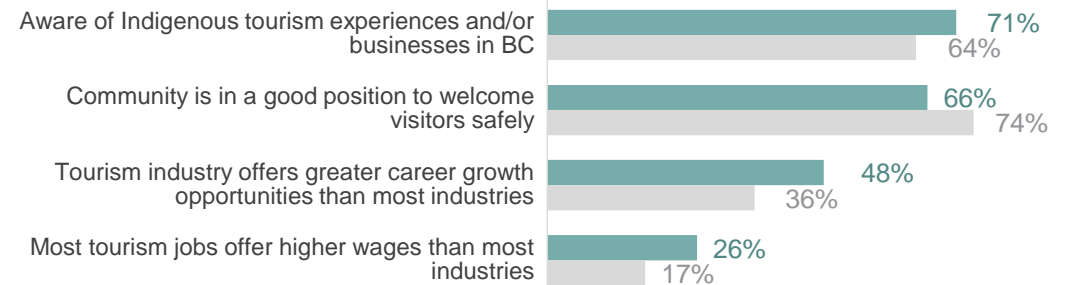
### Racialized People / People of Colour



### Persons with Disabilities



### Indigenous Peoples



### LGBTQIP2SAA Community



■ Equity Deserving Group  
■ Total BC

\*infrastructure, accessibility, etc.

Base: Total (4,038-4,576), Racialized People / People of Colour (615), Person with Disabilities (543-563), Indigenous Peoples (129-148); LGBTQIP2SSA Community (351-354)

S1. 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? /

S2. To what extent do you agree or disagree with the following statement:

# Appendix

CARIBOO CHILCOTIN COAST | NORTHERN BC | VANCOUVER ISLAND  
Great Bear Rainforest | Ted Hesser

# Regional Results - Vancouver, Coast & Mountains



	Total 2023	Tourism Region Vancouver, Coast & Mountains
<b>Perceptions of BC Tourism Industry (% Strongly Agree / Agree)</b>		
Tourism brings people from diverse backgrounds and cultures into my community	85%	85%
I value the contribution visitors make to my local economy	80%	79%
The tourism industry supports local businesses in my community	80%	78%
I believe my community is a desirable place to visit	79%	78%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	78%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	77%
I take pride in making visitors feel welcome in my community	75%	75%
I feel positive about my encounters with visitors in my community	75%	75%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	74%
My community is in a good position to welcome visitors safely	74%	76%
Visitors are able to experience the authenticity of my community when they visit	72%	72%
Overall, tourism contributes positively to the quality of life of my community	72%	71%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	67%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	61%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	56%
I like visiting popular areas even if they might be busy with visitors	52%	53%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	51%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	50%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	46%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	43%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	45%
The tourism industry offers greater career growth opportunities than most other industries	36%	38%
The tourism industry does more to reduce waste than other industries	19%	21%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	20%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	20%

	Total 2023	Tourism Region Vancouver, Coast & Mountains
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	6%
Just the right amount	55%	57%
Too few	39%	37%
<b>Spring (Mar - May)</b>		
Too many	9%	9%
Just the right amount	70%	71%
Too few	22%	20%
<b>Summer (Jun - Aug)</b>		
Too many	35%	35%
Just the right amount	54%	55%
Too few	11%	10%
<b>Fall (Sep - Nov)</b>		
Too many	6%	7%
Just the right amount	66%	67%
Too few	27%	26%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?



# Regional Results – Vancouver Island



	Total 2023	Tourism Region
		Vancouver Island
<b>Perceptions of BC Tourism Industry (% Strongly Agree / Agree)</b>		
Tourism brings people from diverse backgrounds and cultures into my community	85%	84%
I value the contribution visitors make to my local economy	80%	83%
The tourism industry supports local businesses in my community	80%	85%
I believe my community is a desirable place to visit	79%	85%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	80%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	79%
I take pride in making visitors feel welcome in my community	75%	76%
I feel positive about my encounters with visitors in my community	75%	76%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	75%
My community is in a good position to welcome visitors safely	74%	71%
Visitors are able to experience the authenticity of my community when they visit	72%	72%
Overall, tourism contributes positively to the quality of life of my community	72%	73%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	69%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	73%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	49%
I like visiting popular areas even if they might be busy with visitors	52%	49%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	49%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	46%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	40%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	45%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	40%
The tourism industry offers greater career growth opportunities than most other industries	36%	33%
The tourism industry does more to reduce waste than other industries	19%	16%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	16%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	13%

	Total 2023	Tourism Region
		Vancouver Island
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	3%
Just the right amount	55%	54%
Too few	39%	44%
<b>Spring (Mar - May)</b>		
Too many	9%	9%
Just the right amount	70%	73%
Too few	22%	18%
<b>Summer (Jun - Aug)</b>		
Too many	35%	37%
Just the right amount	54%	54%
Too few	11%	9%
<b>Fall (Sep - Nov)</b>		
Too many	6%	7%
Just the right amount	66%	66%
Too few	27%	27%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

■ Higher/lower than Total BC

# Regional Results – Thompson Okanagan



	Total 2023	Tourism Region Thompson Okanagan
<b>Perceptions of BC Tourism Industry (% Strongly Agree / Agree)</b>		
Tourism brings people from diverse backgrounds and cultures into my community	85%	88%
I value the contribution visitors make to my local economy	80%	84%
The tourism industry supports local businesses in my community	80%	86%
I believe my community is a desirable place to visit	79%	85%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	76%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	84%
I take pride in making visitors feel welcome in my community	75%	77%
I feel positive about my encounters with visitors in my community	75%	74%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	78%
My community is in a good position to welcome visitors safely	74%	74%
Visitors are able to experience the authenticity of my community when they visit	72%	76%
Overall, tourism contributes positively to the quality of life of my community	72%	75%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	70%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	71%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	53%
I like visiting popular areas even if they might be busy with visitors	52%	52%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	60%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	50%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	42%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	47%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	37%
The tourism industry offers greater career growth opportunities than most other industries	36%	35%
The tourism industry does more to reduce waste than other industries	19%	13%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	14%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	12%

	Total 2023	Tourism Region Thompson Okanagan
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	5%
Just the right amount	55%	57%
Too few	39%	38%
<b>Spring (Mar - May)</b>		
Too many	9%	7%
Just the right amount	70%	69%
Too few	22%	25%
<b>Summer (Jun - Aug)</b>		
Too many	35%	40%
Just the right amount	54%	52%
Too few	11%	8%
<b>Fall (Sep - Nov)</b>		
Too many	6%	4%
Just the right amount	66%	67%
Too few	27%	29%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

# Regional Results – Kootenay Rockies



	Total 2023	Tourism Region Kootenay Rockies
<b>Perceptions of BC Tourism Industry (% Strongly Agree / Agree)</b>		
Tourism brings people from diverse backgrounds and cultures into my community	85%	77%
I value the contribution visitors make to my local economy	80%	76%
The tourism industry supports local businesses in my community	80%	84%
I believe my community is a desirable place to visit	79%	81%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	77%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	70%
I take pride in making visitors feel welcome in my community	75%	73%
I feel positive about my encounters with visitors in my community	75%	71%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	70%
My community is in a good position to welcome visitors safely	74%	74%
Visitors are able to experience the authenticity of my community when they visit	72%	75%
Overall, tourism contributes positively to the quality of life of my community	72%	67%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	62%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	63%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	48%
I like visiting popular areas even if they might be busy with visitors	52%	45%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	46%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	41%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	41%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	47%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	35%
The tourism industry offers greater career growth opportunities than most other industries	36%	26%
The tourism industry does more to reduce waste than other industries	19%	11%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	13%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	9%

	Total 2023	Tourism Region Kootenay Rockies
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	14%
Just the right amount	55%	55%
Too few	39%	31%
<b>Spring (Mar - May)</b>		
Too many	9%	9%
Just the right amount	70%	55%
Too few	22%	36%
<b>Summer (Jun - Aug)</b>		
Too many	35%	34%
Just the right amount	54%	53%
Too few	11%	13%
<b>Fall (Sep - Nov)</b>		
Too many	6%	9%
Just the right amount	66%	55%
Too few	27%	36%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

■ Higher/lower than Total BC

# Regional Results – Northern BC



	Total 2023	Tourism Region
		Northern BC
<b>Perceptions of BC Tourism Industry</b> (% Strongly Agree / Agree)		
Tourism brings people from diverse backgrounds and cultures into my community	85%	82%
I value the contribution visitors make to my local economy	80%	81%
The tourism industry supports local businesses in my community	80%	79%
I believe my community is a desirable place to visit	79%	61%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	69%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	72%
I take pride in making visitors feel welcome in my community	75%	69%
I feel positive about my encounters with visitors in my community	75%	74%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	73%
My community is in a good position to welcome visitors safely	74%	67%
Visitors are able to experience the authenticity of my community when they visit	72%	62%
Overall, tourism contributes positively to the quality of life of my community	72%	69%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	61%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	64%
Infrastructure, services and amenities in my community are <b>designed</b> and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	36%
I like visiting popular areas even if they might be busy with visitors	52%	50%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	34%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	38%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	45%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	40%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	47%
The tourism industry offers greater career growth opportunities than most other industries	36%	33%
The tourism industry does more to reduce waste than other industries	19%	17%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	10%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	12%

	Total 2023	Tourism Region
		Northern BC
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	2%
Just the right amount	55%	40%
Too few	39%	58%
<b>Spring (Mar - May)</b>		
Too many	9%	3%
Just the right amount	70%	56%
Too few	22%	41%
<b>Summer (Jun - Aug)</b>		
Too many	35%	13%
Just the right amount	54%	58%
Too few	11%	29%
<b>Fall (Sep - Nov)</b>		
Too many	6%	4%
Just the right amount	66%	58%
Too few	27%	37%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

■ Higher/lower than Total BC

# Regional Results – Cariboo Chilcotin Coast



	Total 2023	Tourism Region Cariboo Chilcotin Coast
<b>Perceptions of BC Tourism Industry</b> (% Strongly Agree / Agree)		
Tourism brings people from diverse backgrounds and cultures into my community	85%	84%
I value the contribution visitors make to my local economy	80%	90%
The tourism industry supports local businesses in my community	80%	81%
I believe my community is a desirable place to visit	79%	56%
The prov. government's investment in developing tourism infrastructure is an important investment in BC's communities	78%	66%
Tourism supports a greater diversity of amenities than would otherwise exist in my community	78%	70%
I take pride in making visitors feel welcome in my community	75%	80%
I feel positive about my encounters with visitors in my community	75%	78%
Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts	75%	77%
My community is in a good position to welcome visitors safely	74%	59%
Visitors are able to experience the authenticity of my community when they visit	72%	78%
Overall, tourism contributes positively to the quality of life of my community	72%	64%
My community is in a good position to welcome visitors (infrastructure, accessibility, etc.)	67%	63%
I am aware of Indigenous tourism experiences and/or businesses in BC	64%	68%
Infrastructure, services and amenities in my community are designed and/or adapted to serve visitors with disabilities, including permanent, temporary, visible or invisible disabilities	53%	46%
I like visiting popular areas even if they might be busy with visitors	52%	49%
The tourism industry uses more locally produced goods, services and agricultural products than most industries	51%	52%
Tourism supports additional infrastructure services than would otherwise exist in my community	48%	34%
The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches	44%	59%
Residents are involved and play a role in influencing the planning and development of tourism in my community	44%	38%
The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes	43%	39%
The tourism industry offers greater career growth opportunities than most other industries	36%	23%
The tourism industry does more to reduce waste than other industries	19%	8%
The tourism industry does more to reduce local carbon emissions than other industries.	18%	12%
Most jobs in the tourism industry offer higher wages than most other industries.	17%	6%

	Total 2023	Tourism Region Cariboo Chilcotin Coast
<b>Perceptions on Amount of Tourism in Community</b>		
<b>Winter (Dec – Feb)</b>		
Too many	6%	10%
Just the right amount	55%	33%
Too few	39%	57%
<b>Spring (Mar - May)</b>		
Too many	9%	8%
Just the right amount	70%	50%
Too few	22%	42%
<b>Summer (Jun - Aug)</b>		
Too many	35%	18%
Just the right amount	54%	61%
Too few	11%	21%
<b>Fall (Sep - Nov)</b>		
Too many	6%	10%
Just the right amount	66%	51%
Too few	27%	39%

S1. 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?

S2. To what extent do you agree or disagree with the following statement:

S3. Do you think your community has too few, too many, or just the right amount of tourism throughout the year?

Higher/lower than Total BC

# Resident Demographic Profile



	Total 2022	Total 2023	Tourism Region (2023)					
			Vancouver, Coast & Mountains	Vancouver Island	Thompson Okanagan	Kootenay Rockies	Northern BC	Cariboo Chilcotin Coast
Base	3,806	4,684	2,685	810	705	215	208	61
<b>Age</b>								
18-24	6%	6%	7%	3%	6%	4%	6%	2%
25-34	19%	21%	22%	20%	18%	17%	24%	20%
35-44	17%	16%	18%	13%	12%	15%	17%	20%
45-54	18%	15%	15%	15%	16%	16%	16%	10%
55-64	14%	14%	14%	15%	15%	16%	15%	20%
65 and over	26%	26%	23%	34%	32%	32%	22%	28%
Prefer not to answer	n/a	<1%	<1%	<1%	<1%	1%	0%	0%
<b>Gender</b>								
Female	51%	50%	50%	51%	50%	48%	48%	49%
Male	48%	48%	47%	48%	47%	48%	49%	49%
Genderqueer/Genderfluid/Non-binary	1%	1%	1%	1%	1%	1%	1%	2%
Two-Spirit	n/a	<1%	<1%	0%	<1%	1%	1%	0%
Other	n/a	<1%	<1%	0%	<1%	1%	0%	0%
Prefer not to answer	n/a	1%	1%	<1%	2%	1%	2%	0%
<b>Member of Equity-Deserving Group</b>								
Racialized People or People of Colour	n/a	16%	22%	6%	7%	6%	6%	0%
Persons with Disabilities		12%	10%	16%	16%	17%	17%	6%
LGBTQIP2SAA		9%	9%	10%	9%	10%	11%	4%
Indigenous		3%	3%	3%	5%	5%	13%	4%
None of the Above		64%	61%	69%	67%	64%	58%	83%
Prefer not to answer		2%	2%	2%	3%	3%	3%	3%

# Resident Demographic Profile



	Total 2022	Total 2023	Tourism Region (2023)					
			Vancouver, Coast & Mountains	Vancouver Island	Thompson Okanagan	Kootenay Rockies	Northern BC	Cariboo Chilcotin Coast
Base	3,806	4,684	2,685	810	705	215	208	61
<b>Years lived in British Columbia</b>								
Less than 1 year	1%	2%	2%	1%	2%	0%	<1%	0%
1-5 years	7%	7%	7%	7%	8%	6%	7%	3%
6-10 years	7%	7%	7%	7%	6%	10%	2%	4%
11-15 years	6%	5%	5%	4%	5%	11%	2%	1%
More than 15 years	78%	79%	78%	80%	78%	73%	88%	91%
Prefer not to answer	<1%	<1%	<1%	<1%	1%	1%	0%	0%
<b>Highest Level of Education</b>								
High school or less	18%	19%	16%	20%	24%	21%	32%	26%
Post-secondary school (University / College)	61%	61%	63%	60%	60%	58%	55%	54%
Graduate School	18%	17%	18%	17%	10%	17%	9%	6%
Other	n/a	3%	2%	2%	4%	3%	3%	12%
Prefer not to answer		1%	1%	1%	2%	1%	1%	1%
<b>Annual Household Income</b>								
Under \$50,000 per year	23%	19%	17%	19%	27%	25%	23%	16%
\$50,000 to under \$75,000	18%	17%	17%	18%	17%	17%	19%	18%
\$75,000 to under \$100,000	18%	17%	17%	18%	15%	20%	14%	14%
\$100,000 to under \$150,000	20%	20%	20%	22%	19%	19%	21%	24%
\$150,000 to under \$250,000	12%	11%	12%	10%	10%	6%	8%	15%
\$250,000 or more		3%	4%	2%	1%	1%	2%	2%
Prefer not to answer	10%	12%	12%	11%	10%	12%	12%	11%

# Resident Demographic Profile



	Total 2022	Total 2023	Tourism Region (2023)					
			Vancouver, Coast & Mountains	Vancouver Island	Thompson Okanagan	Kootenay Rockies	Northern BC	Cariboo Chilcotin Coast
Base	3,806	4,684	2,685	810	705	215	208	61
<b>Industry of Employment</b>								
I'm not employed (retired, homemaker, student, other reasons)	38%	36%	32%	41%	44%	45%	39%	42%
Health care and social assistance	8%	8%	8%	8%	8%	9%	6%	10%
Educational services	8%	6%	6%	5%	6%	4%	4%	6%
Finances, insurance, real estate, rental and leasing	6%	5%	6%	3%	3%	1%	2%	0%
High Technology	4%	4%	5%	3%	3%	1%	1%	0%
Construction	3%	4%	4%	4%	4%	6%	5%	0%
Public administration	3%	4%	3%	6%	3%	2%	3%	4%
Transportation and warehousing	3%	3%	4%	2%	1%	2%	2%	0%
Tourism	2%	2%	2%	2%	2%	4%	1%	0%
Manufacturing / Aerospace	2%	2%	2%	1%	2%	1%	4%	0%
Film / Animation / Design	1%	2%	2%	1%	<1%	2%	<1%	1%
Agriculture / Fisheries / Aquaculture / Viticulture	1%	1%	1%	2%	2%	1%	1%	7%
Utilities	0%	1%	1%	1%	<1%	1%	1%	0%
Mining	1%	1%	1%	1%	1%	3%	1%	6%
Oil & Gas	0%	1%	<1%	<1%	<1%	1%	5%	0%
Forestry	1%	1%	<1%	1%	1%	2%	5%	0%
Other	20%	19%	19%	21%	19%	14%	18%	25%
Prefer not to answer	n/a	1%	1%	1%	1%	1%	1%	0%



# Resident Demographic Profile



	Total 2022	Total 2023	Tourism Region (2023) <sup>1</sup>					
			VCM	VI	TO	KR	NBC	CCC
Base	3,806	4,684	2,685	810	705	215	208	61
<b>Ethnic Origin of Ancestors</b>								
American	1%	1%	1%	1%	1%	2%	<1%	0%
British	8%	8%	7%	10%	8%	10%	7%	5%
Canadian	9%	5%	4%	6%	3%	6%	2%	12%
Chinese	11%	10%	15%	3%	2%	0%	2%	0%
Danish	1%	1%	1%	1%	1%	2%	1%	2%
Dutch	4%	3%	3%	3%	7%	4%	3%	7%
English	18%	17%	14%	25%	24%	20%	18%	31%
European	4%	8%	8%	8%	10%	8%	13%	8%
Filipino	1%	2%	3%	1%	1%	1%	1%	1%
Finnish	1%	1%	1%	1%	1%	0%	<1%	0%
French	7%	5%	4%	6%	8%	6%	10%	2%
German	10%	10%	8%	10%	16%	13%	16%	9%
Hungarian	1%	1%	1%	1%	2%	0%	1%	0%
Indian	2%	3%	4%	1%	<1%	<1%	1%	0%
Indigenous	3%	3%	2%	4%	6%	5%	11%	3%
Irish	14%	12%	10%	19%	15%	16%	17%	10%
Italian	3%	3%	3%	2%	4%	5%	3%	9%
Japanese	1%	1%	2%	1%	1%	0%	2%	0%
Norwegian	2%	2%	2%	2%	3%	4%	2%	10%
Polish	3%	3%	3%	3%	3%	5%	2%	5%
Russian	2%	2%	2%	2%	3%	2%	3%	2%
Scottish	17%	15%	11%	24%	21%	22%	25%	10%
South Asian	1%	1%	1%	0%	0%	0%	0%	0%
Swedish	2%	1%	1%	1%	3%	2%	1%	1%
UK	1%	1%	1%	1%	<1%	0%	<1%	0%
Ukrainian	5%	5%	5%	7%	6%	8%	7%	5%
Welsh	2%	2%	2%	3%	2%	2%	7%	5%
White	2%	1%	1%	1%	1%	1%	1%	4%
Other	10%	11%	13%	6%	9%	6%	7%	2%
Don't Know	16%	<1%	<1%	<1%	<1%	1%	1%	0%
Prefer not to answer	n/a	14%	15%	14%	11%	16%	11%	6%

	Total 2022	Total 2023	Tourism Region (2023) <sup>1</sup>					
			VCM	VI	TO	KR	NBC	CCC
Base	3,806	4,684	2,685	810	705	215	208	61
<b>Ethnic Identity</b>								
American	1%	<1%	<1%	<1%	<1%	1%	0%	1%
British	4%	3%	3%	4%	3%	3%	2%	0%
Canadian	47%	34%	29%	42%	44%	39%	37%	52%
Chinese	12%	9%	14%	2%	2%	0%	1%	0%
Danish	1%	<1%	<1%	<1%	<1%	<1%	1%	0%
Dutch	2%	2%	1%	1%	3%	1%	2%	2%
English	8%	8%	6%	11%	10%	10%	7%	13%
European	2%	4%	4%	3%	4%	3%	4%	1%
Filipino	2%	2%	2%	1%	1%	1%	2%	1%
Finnish	0%	<1%	<1%	<1%	<1%	0%	<1%	0%
French	3%	2%	2%	2%	3%	4%	5%	3%
German	4%	3%	3%	4%	5%	6%	6%	5%
Hungarian	<1%	<1%	<1%	1%	1%	0%	0%	0%
Indian	2%	2%	4%	1%	<1%	0%	1%	0%
Indigenous	3%	2%	2%	2%	5%	2%	8%	3%
Irish	5%	5%	4%	6%	6%	7%	7%	5%
Italian	2%	2%	2%	1%	2%	3%	1%	7%
Japanese	1%	1%	1%	1%	1%	0%	2%	0%
Norwegian	1%	1%	1%	1%	2%	3%	1%	1%
Polish	1%	1%	1%	1%	<1%	3%	<1%	0%
Russian	1%	1%	<1%	1%	1%	1%	1%	0%
Scottish	7%	7%	4%	10%	9%	13%	15%	1%
South Asian	1%	1%	1%	0%	<1%	0%	0%	0%
Swedish	1%	1%	1%	<1%	1%	1%	1%	0%
UK	<1%	<1%	<1%	<1%	<1%	0%	1%	0%
Ukrainian	3%	3%	2%	4%	2%	2%	5%	4%
Welsh	1%	1%	1%	1%	1%	1%	3%	2%
White	7%	3%	3%	4%	4%	3%	3%	3%
Other	9%	8%	10%	4%	6%	7%	6%	2%
Don't Know	1%	<1%	<1%	0%	0%	0%	0%	0%
Prefer not to answer	n/a	15%	16%	16%	11%	19%	15%	7%

<sup>1</sup>VCM: Vancouver, Coast & Mountains, VI: Vancouver Island, TO: Thompson Okanagan, KR: Kootenay Rockies, NBC: Northern BC, CCC: Cariboo Chilcotin Coast

D4. What are the ethnic origins of your ancestors? Please list as many as you'd like. An ancestor is usually more distant than a grandparent. / D5. Which ethnicity do you identify with today?

# Resident Demographic Profile



	Total 2022	Total 2023
Base	3,806	4,684
<b>Tourism Region</b>		
Vancouver, Coast & Mountains	56%	64%
Vancouver Island	17%	18%
Thompson Okanagan	18%	10%
Kootenay Rockies	4%	3%
Northern BC	5%	4%
Cariboo Chilcotin Coast	1%	1%

Region	2023 Sample Sizes
<b>Vancouver, Coast &amp; Mountains</b>	<b>2,685</b>
Abbotsford/Mission/Chilliwack	245
Burnaby/New Westminister	314
Delta/Surrey/White Rock	505
Maple Ridge/Pitt Meadows/Coquitlam/Port Coquitlam/Port Moody/Langley	422
North Vancouver/West Vancouver	252
Richmond	240
Vancouver (Downtown)	195
Vancouver (East)	210
Vancouver (West)	212
Other Vancouver, Coast & Mountains	90
<b>Vancouver Island</b>	<b>810</b>
Capital Region	355
Central Island [Cowichan Valley, Alberni-Clayoquot]	203
Central Island [Nanaimo only]	120
North Island [Mount Waddington, Strathcona, Comox Valley]	132
<b>Thompson Okanagan</b>	<b>705</b>
Thompson-Nicola [Kamloops only]	128
Other Thompson-Nicola	58
Northern Okanagan	132
Central Okanagan	274
Okanagan-Similkameen	113
<b>Kootenay Rockies</b>	<b>215</b>
<b>Northern BC</b>	<b>208</b>
Prince George	107
Other Northern BC	101
<b>Cariboo Chilcotin Coast</b>	<b>61</b>
<b>Total</b>	<b>4,684</b>



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