



Report

Brand Awareness and Perception Study



Date: July 8, 2025
Project: 43286-002



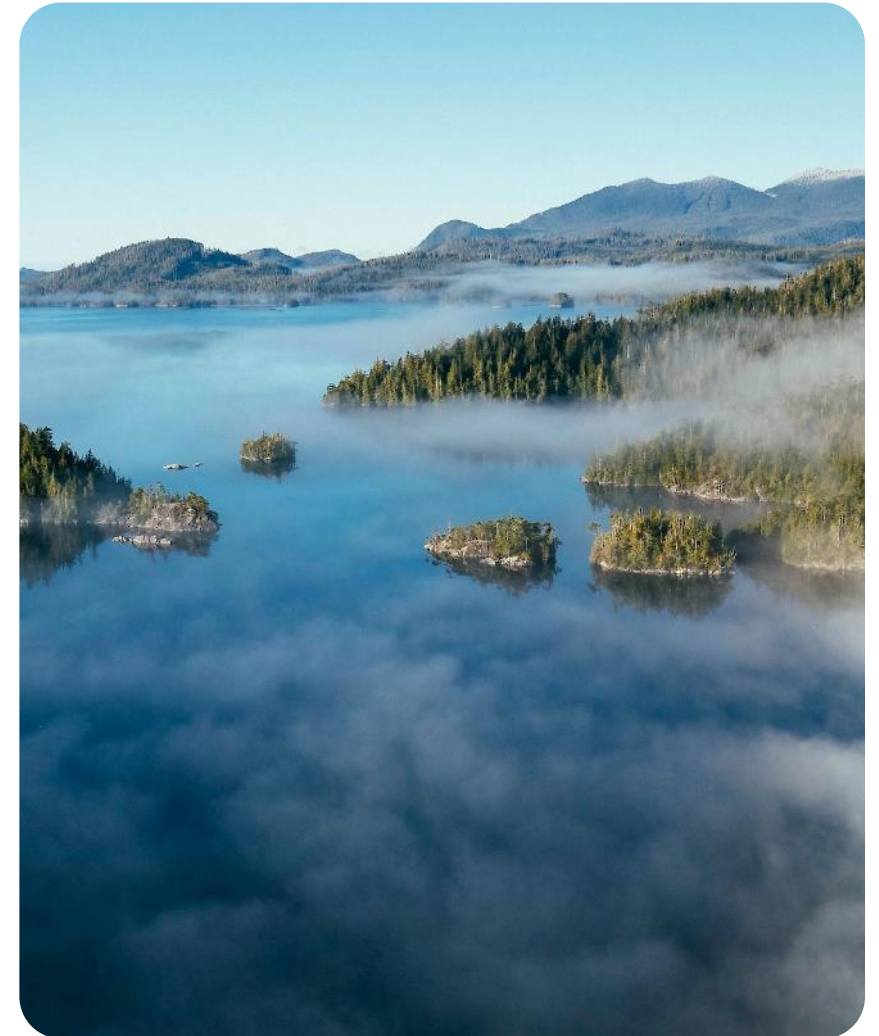
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1

Introduction



Background and Objectives



Background

In 2024, Tourism Tofino sought to better understand BC travellers' awareness and perceptions to help boost non-peak visitation.

This second wave builds on the 2024 baseline, tracking shifts among BC residents and adding comparisons with Alberta travellers.

Findings will continue to inform strategies for enhancing Tourism Tofino's offering.

Objectives

- Measure & track awareness of and familiarity with Tofino
- Understand current perceptions and overall opinion of Tofino as a travel destination
- Assess previous travel to Tofino and likelihood of visiting Tofino in the next 5 years
- Explore travel motivators and barriers for visiting Tofino
- Measure interest in specific Tofino tourism experiences
- Identify differences in behaviour and perceptions by demographic sub-groups.

Methodology



Methodology

Leger conducted an online survey with 1,503 BC travellers and 602 AB travellers randomly recruited from the LEO panel.

Respondents were screened to include residents aged 18 years or older who:

- Have travelled in the past 2 years or
- Are likely to travel in the next 2 years.



When

Wave 1: May 9 to 16, 2024

Wave 2: May 26 to Jun 9, 2025



Margin of Error & Weighting

A probability sample of 1,503 BC travellers yields a margin of error no more than $\pm 2.5\%$, 19 times out of 20.

A sample of 602 AB travellers yields a margin of error no more than $\pm 4.0\%$, 19 times out of 20.

Statistics Canada's latest census was used to weight the data by age, gender, region, and survey incidence, ensuring a representative sample of BC and AB travellers.



Significant Differences

Significant differences between sample subgroups are marked as follows:

Significantly **higher/lower** than comparison group(s)

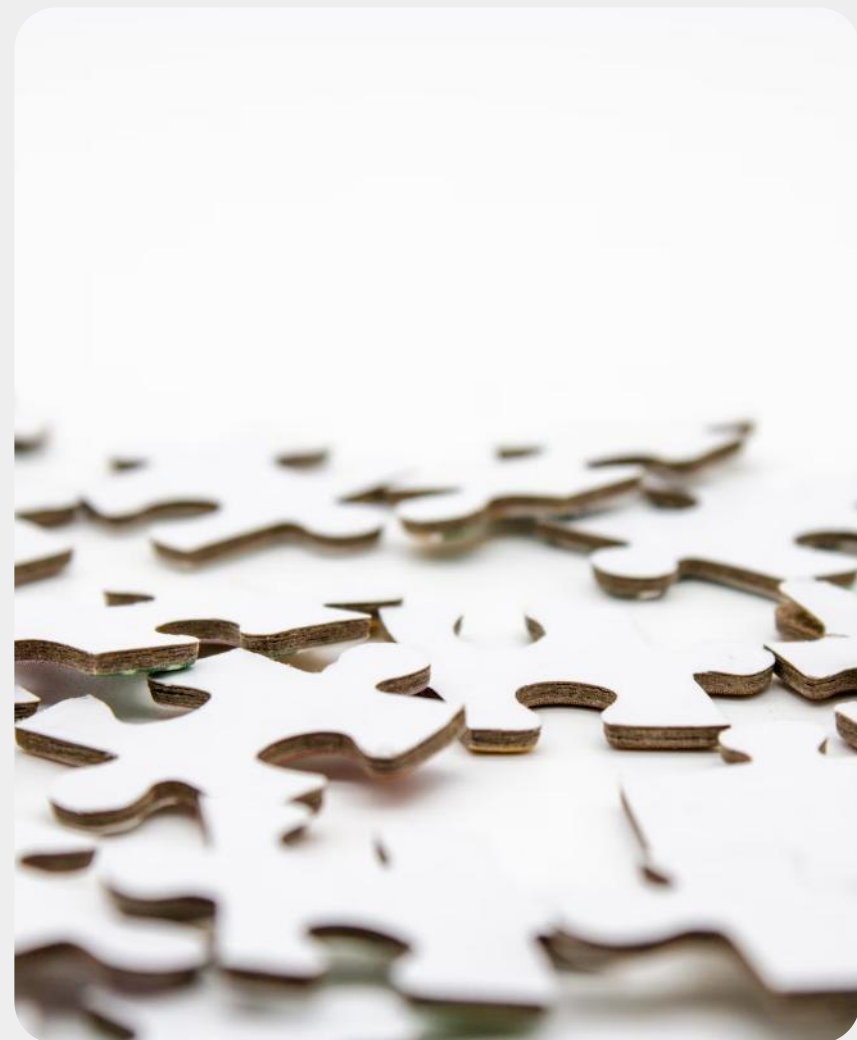
Statistically significantly **higher/lower** than AB.

Significant differences between 2024 and 2025 are marked as follows:

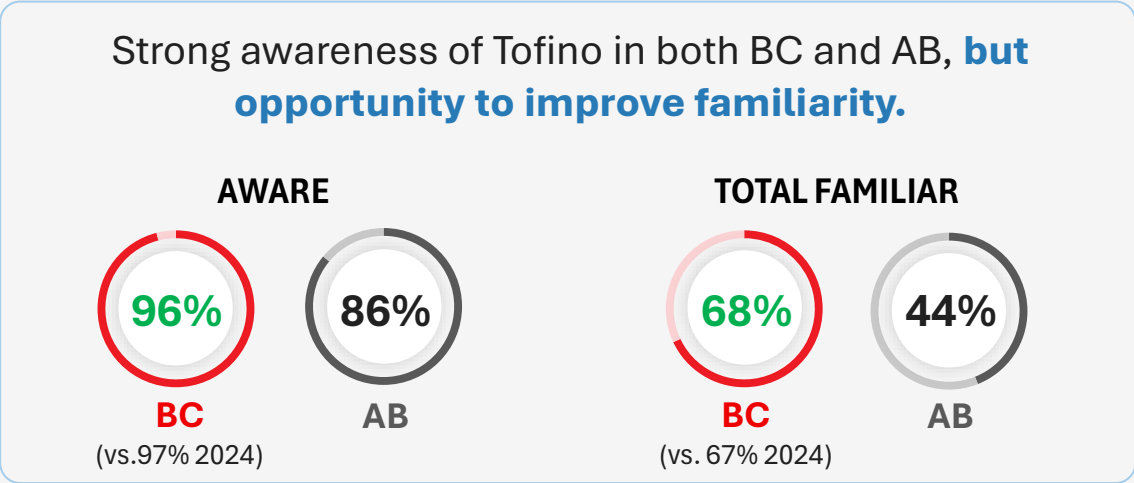
↕ Statistically significantly higher/lower than 2024.

2

Key Findings & Recommendations



Key Findings: Awareness, Familiarity, & Visitation

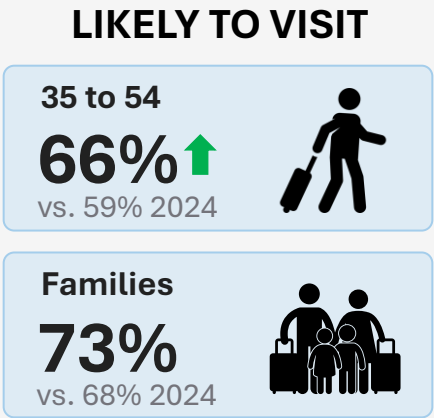


Interest in **visiting Tofino in next 5 years** is strong among BC travellers and moderate among Albertans.



Growing interest among BC families and those aged 35 to 54 suggests **marketing is resonating.**

While overall visitation intent remains unchanged, interest among BC travellers aged 35 to 54 and families with children increased this year.



Like last year, **strong opportunity to promote spring and fall travel to Tofino**, particularly among younger travellers and families with children.

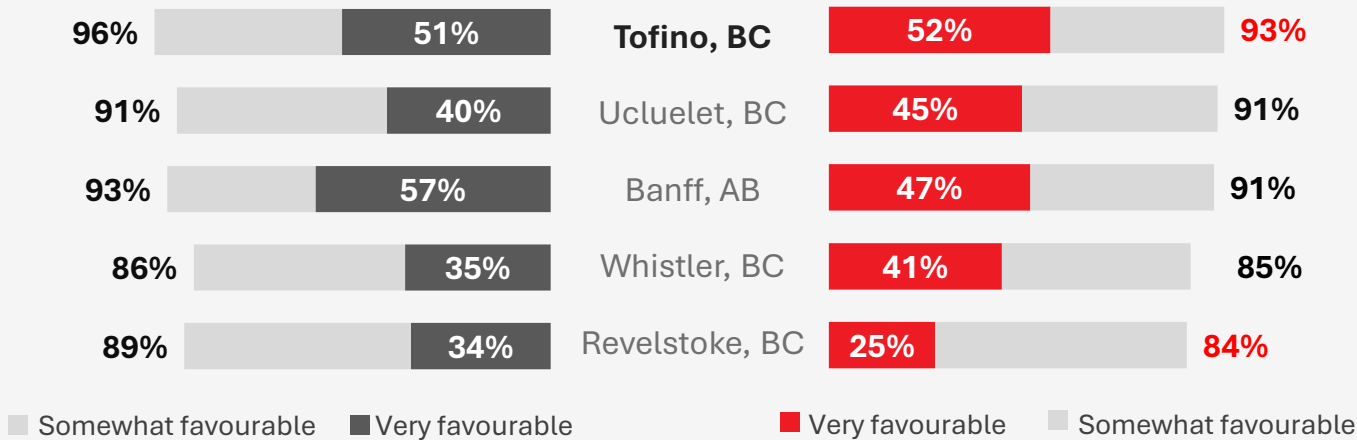


↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Key Findings: Brand Perceptions & Core Strengths

Very favourable overall perceptions of Tofino in BC and AB, with growing positivity among BC families.

TOFINO ranks highest among all key competitors.



Among **BC families**, favourability toward Tofino has **risen significantly**, suggesting growing impact of Tourism Tofino’s family-focused efforts.

FAVOURABILITY AMONG BC FAMILIES



TOFINO EXCELS WHERE IT MATTERS MOST: Key strengths align with top drivers of visitor perception.



Marketing efforts should **continue to focus on these high-performing attributes** to maintain and strengthen Tofino’s overall appeal.



Being authentic



Offers rest and relaxation



Protects/ cherishes unique natural surroundings



Provides a variety of outdoor activities



Makes visitors feel connected to nature

↑↓ Statistically significantly higher/lower than 2024.
Statistically significantly **higher**/**lower** than AB.

Key Findings: Untapped Potential

Like last year, Tofino continues to excel in the right places, and there are no key areas for improvement. However, cultural and culinary experiences remain undervalued and underperforming.

Several lower priority areas provide potential opportunities for Tourism Tofino to diversify Tofino’s appeal and attract new types of visitors.

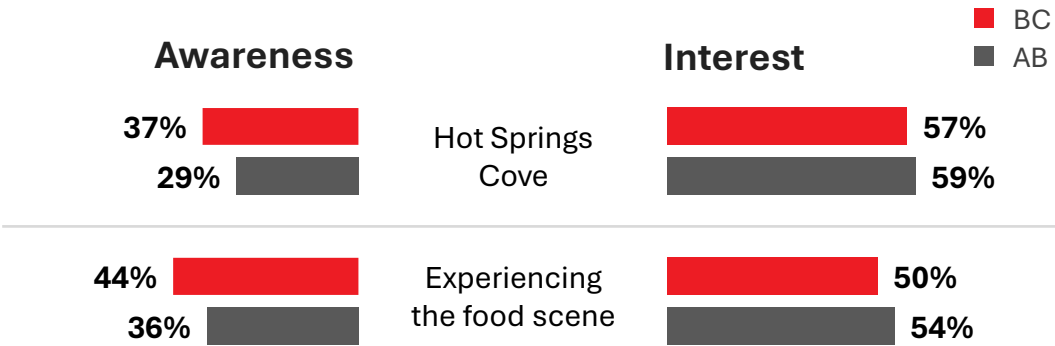


Limited Awareness of Some Experiences Presents Valuable Opportunity.

Activities with **highest interest** across both BC and AB markets:

- Hot Springs Cove
- Nature Walks/Hikes
- Local Food Scene
- Wildlife Watching

Although **Hot Springs Cove** and the **local food scene** spark **high interest, limited awareness** – particularly in Alberta – presents an opportunity for targeted promotion.



Key Findings: Motivators & Barriers

Among both BC and AB travellers, top two motivators for visiting Tofino are **natural beauty** and **ocean and forest experiences**.



Natural Beauty



Ocean and Forest experiences

Tofino’s food scene, low crowds, safety and inclusivity, and outdoor activities are more motivating for AB travellers.

Food Scene



29%

vs. 22% BC

Low Crowds



26%

vs. 21% BC

Safety & Inclusivity



26%

vs. 19% BC

Outdoor Activities



25%

vs. 20% BC

Main barriers to visiting Tofino are similar between BC and AB travellers and continue to centre around affordability, ease of access, accommodation availability, and crowding.



Affordability/
cost of travel



Too far/
hard to get to



Finding
accommodation



Too busy/
crowded



Needing ferry
to get there



Recommendations for Encouraging Off Season Visitation & Attracting New Visitors

1

Encourage non-peak travel by highlighting unique experiences & advantages of Tofino in the shoulder seasons

- Highlight the **unique advantages** of visiting Tofino in **spring, fall, and winter**, such as fewer crowds, lower costs, seasonal wildlife, storm watching, and local events.
- Collaborate with tourism partners to offer special packages, promotions, and bundled experiences to drive visitation in shoulder seasons.

2

Enhance visibility of key activities & top drivers to attract new visitors

- Alberta travellers show strong interest in Tofino's offerings, and lower familiarity presents an opportunity to boost awareness, especially as more Canadians consider domestic travel due to political uncertainty and U.S. tariffs.
- Increase awareness of **Hot Springs Cove** and Tofino's **local food** scene through targeted social media content, influencer collaborations, and curated itineraries that highlight these high-interest but lesser-known experiences.
- Continue to highlight Tofino's positioning as a place to unplug, recharge, and reconnect with nature.
- Reinforce messaging on Tofino's commitment to protecting its natural surroundings and provide practical tips for low-impact tourism.

3

Consider diversifying Tofino's appeal to attract new types of visitors

- Boost awareness of year-round activities, vibrant arts and culture community, and opportunities to learn about Indigenous culture. Consider **repositioning** or **integrating** these offerings within broader themes (e.g., nature-inspired art displays, cultural storytelling paired with guided walks or wildlife tours).
- Continue to **partner with Indigenous communities** to support authentic cultural experiences.

Recommendations for Targeting Younger Travellers & Families

1

Continue to grow familiarity and appeal among younger travellers.

- Continue to develop **marketing campaigns** that specifically **target younger travellers** to increase their familiarity with Tofino. Use social media platforms like Instagram, TikTok, and YouTube to showcase the unique experiences and activities Tofino offers.
- Continue **collaborating with influencers** and creators who align with younger audiences to promote Tofino's attractions.
- Consider developing **shareable trip guides** tailored to younger audiences (e.g., budget-friendly weekend getaways).

2

Sustain momentum with families.

- Ongoing efforts to promote family-friendly activities are resonating. **Continue promoting educational and interactive experiences** that appeal to children and parents, such as nature-based activities, wildlife viewing, and hands-on cultural opportunities.
- Reinforce Tofino as a year-round destination with **curated family packages, seasonal itineraries, and family-focused programming**.
- Provide **practical information** for families such as flexible dining options, stroller friendly paths, and rainy-day activities.
- Feature family testimonials and stories on social media to inspire and reassure potential visitors.

3

Keep tailoring off-peak messaging to younger audiences.

- Promote affordability, fewer crowds, and unique seasonal experiences that speak to the values, flexibility, and interests of younger travellers.

3

Detailed Findings





Awareness & Familiarity

Awareness of Travel Destinations

Consistent with 2024 results, almost all BC travellers are aware of Tofino, once again placing it just behind Whistler and Banff in overall awareness. As anticipated, Alberta travellers report lower awareness of Tofino, ranking it behind Banff, Whistler, and Revelstoke. In contrast, BC travellers are more likely to be aware of Tofino as well as most other key competitors except for Banff. There have been no changes in awareness of any of the destinations compared to 2024.

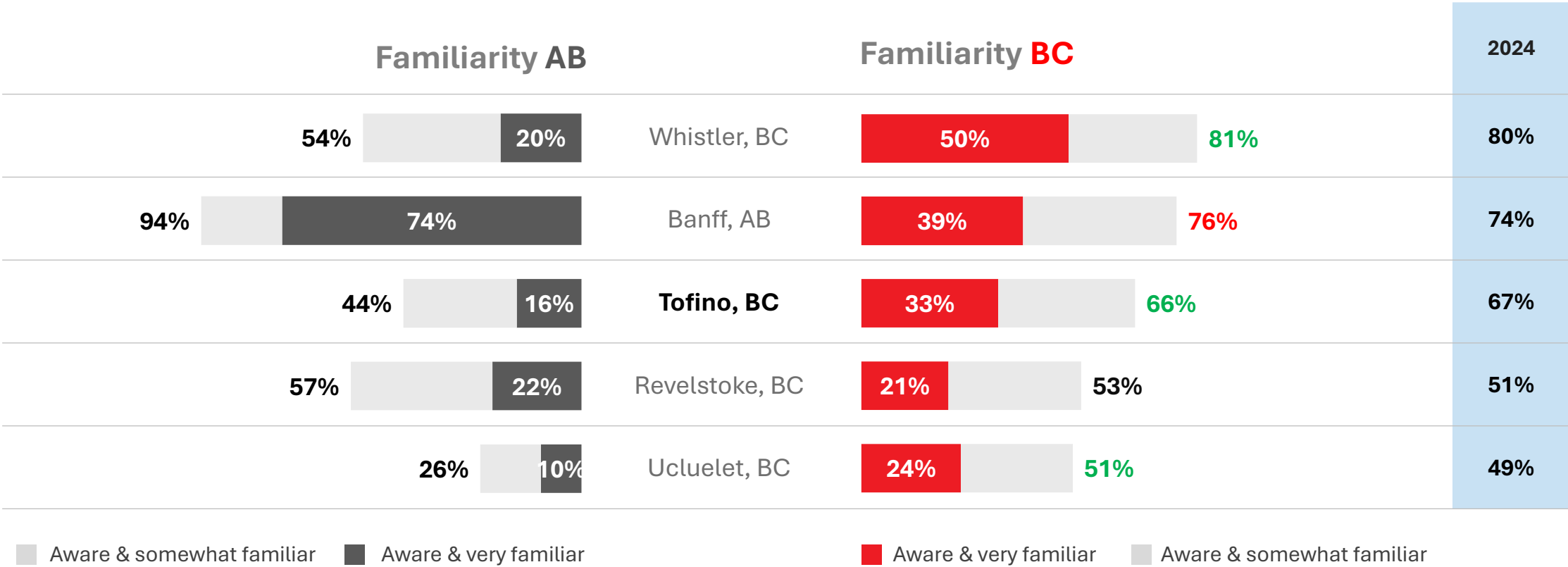
Awareness AB		Awareness BC		2024
95%		Whistler, BC	99%	99%
99%		Banff, AB	99%	98%
86%		Tofino, BC	96%	97%
89%		Revelstoke, BC	92%	93%
64%		Ucluelet, BC	87%	88%

A1. How aware and familiar are you with each of the following travel destinations?
Base: Total AB 2025 (n=602); Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Familiarity with Travel Destinations

Familiarity with Tofino remains stable among BC travellers, placing it mid-pack among key destinations (behind Whistler and Banff, but ahead of Revelstoke and Ucluelet). Two-thirds are familiar with Tofino as a travel destination, including one-third who are very familiar. Familiarity is significantly lower among AB travellers at 44%. For Albertans, Tofino trails Revelstoke and Whistler, highlighting an ongoing opportunity to raise Tofino’s profile in the Alberta market.



A1. How aware and familiar are you with each of the following travel destinations?
Base: Total AB 2025 (n=602); Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Familiarity with Travel Destinations – By BC Demographics

Similar to last year, familiarity with both Tofino and Ucluelet is highest among residents of Vancouver Island/Coast, while Whistler shows strong and consistent familiarity across all age groups. Notably, travellers aged 35 and older are significantly more familiar with Tofino than younger travellers, suggesting an opportunity to deepen engagement among the 18 to 34 segment. Travellers age 55 and older are more likely to be familiar with most destinations.

Familiarity (Very/Somewhat)

Destination	Total	Age			Region			
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC
n=	1,503	376	489	638	900	302	151	150
Whistler, BC	81%	79%	83%	80%	89%	69%	73%	72%
Banff, AB	76%	71%	72%	82%	74%	78%	78%	80%
Tofino, BC	66%	60%	68%	70%	64%	61%	82%	58%
Revelstoke, BC	53%	49%	46%	61%	44%	71%	54%	55%
Ucluelet, BC	51%	38%	50%	60%	46%	45%	73%	49%

Familiarity with Travel Destinations – By AB Demographics

As with BC residents, Alberta travellers are most familiar with destinations closer to home, with Banff showing near-universal familiarity across all age groups and regions. Among Albertans, familiarity with BC destinations remains lower overall. There are no significant differences in familiarity with Tofino by age or region within Alberta.

Familiarity (Very/Somewhat)

Destination	Total	Age			Region	
		18-34	35-54	55+	Calgary CMA	Edmonton CMA
n=	602	177	218	207	301	301
Banff, AB	94%	91%	93%	97%	98%	90%
Revelstoke, BC	57%	47%	58%	64%	62%	51%
Whistler, BC	54%	59%	50%	54%	54%	54%
Tofino, BC	44%	44%	40%	50%	45%	44%
Ucluelet, BC	26%	25%	21%	33%	27%	25%

A1. How aware and familiar are you with each of the following travel destinations?
Base: AB respondents (n=602)

Statistically significantly higher than comparison group(s).

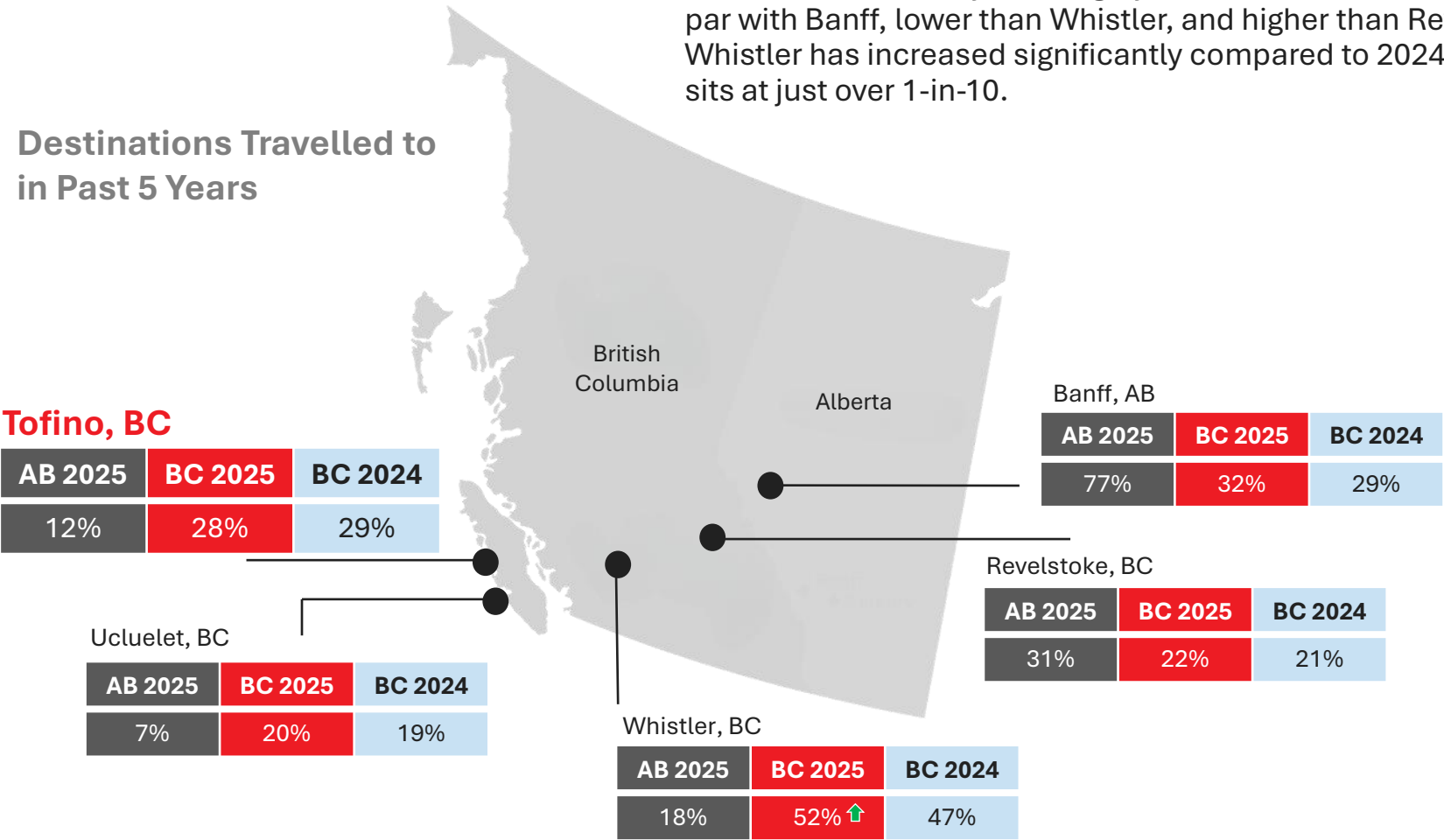


Past & Future Travel

Past Visitation

Consistent with last year, roughly 3-in-10 BC travellers have visited Tofino in the past 5 years, on par with Banff, lower than Whistler, and higher than Revelstoke and Ucluelet. Visitation to Whistler has increased significantly compared to 2024. Among Albertans, past visitation to Tofino sits at just over 1-in-10.

Destinations Travelled to in Past 5 Years



Those **more likely** to have travelled to Tofino in the **past 5 years** include:

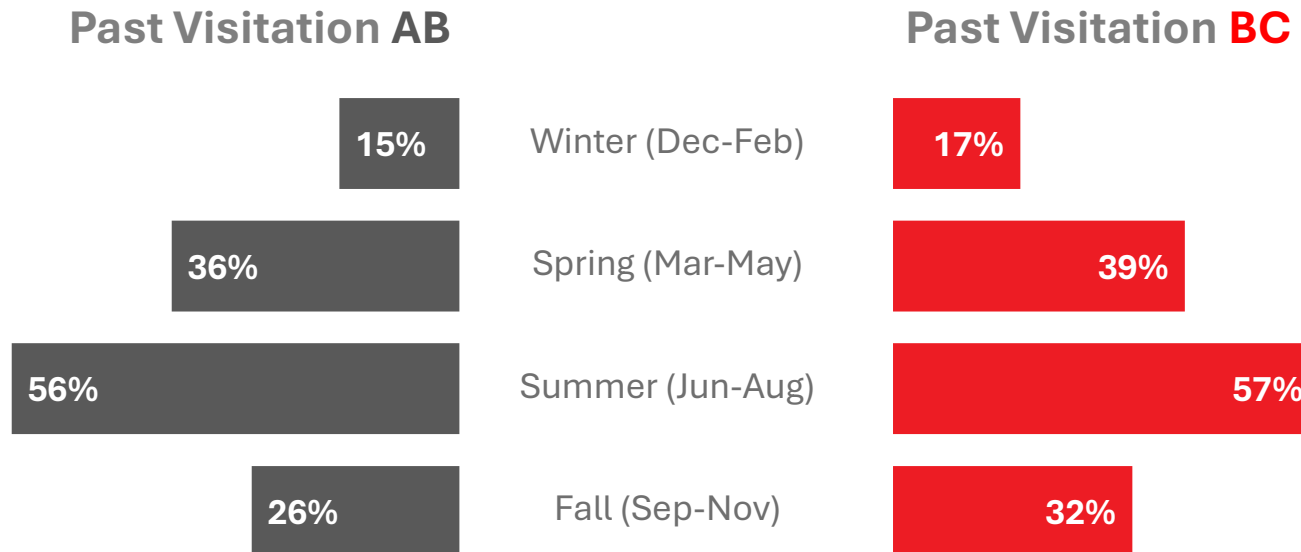
- **Vancouver Island/Coast residents** (53% vs. 27% Other BC, 23% Metro Vancouver, 21% Interior BC)
- BC travellers with **higher incomes** (36% \$75K+ vs. 22% <\$75K)
- AB travellers with **higher incomes** (16% \$75K+ vs. 8% <\$75K)
- In 2025, BC travellers with (31%) and without (28%) children are equally likely to have visited Tofino – a shift from 2024, when those with children were more likely to have visited

B1. Which of the following destinations have you travelled to in the past 5 years?
Base: Total AB 2025 (n=602); Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.

Past Visitation to Tofino During Different Seasons

Past visitation follows a similar seasonal pattern regardless of whether visitors are from BC or AB, with summer being the most common time to travel to Tofino, followed by spring. Fall visitation is slightly more prevalent among BC travellers. These results suggest an opportunity to further promote shoulder season travel in both markets.

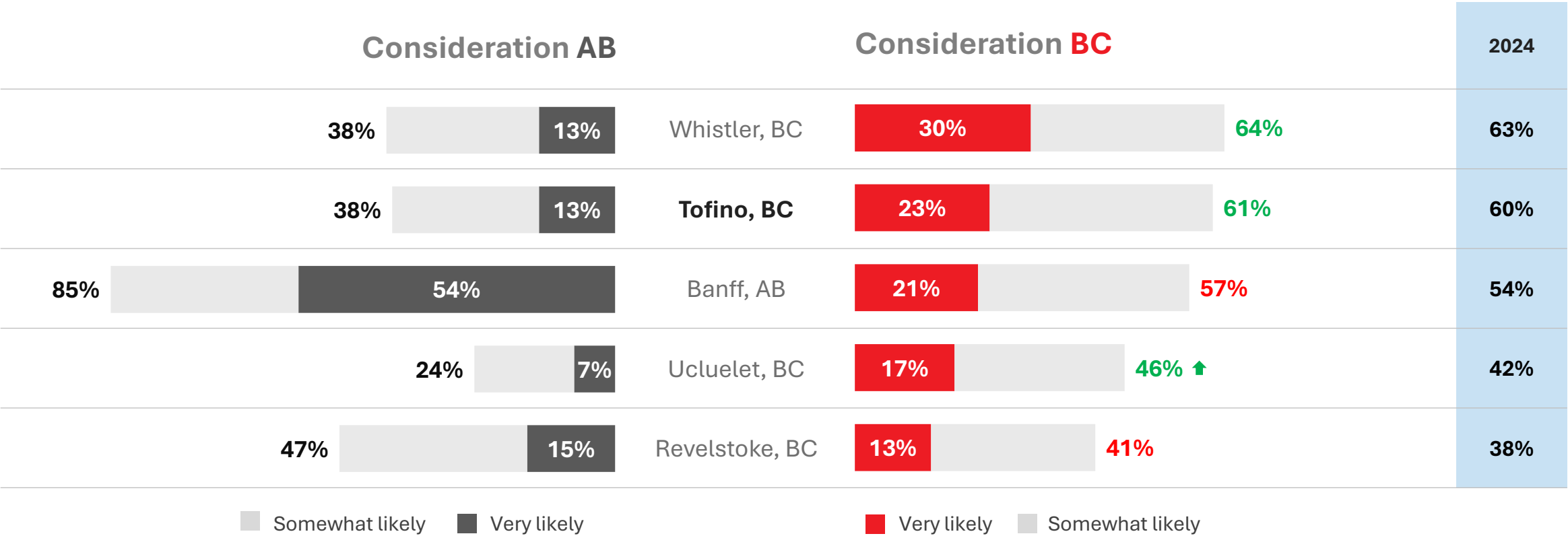


Among **BC** past visitors...

- Those aged **18-34** are significantly more likely to have **visited Tofino in the spring** (49% vs. 35% age 35+)
- Those from **Vancouver Island/Coast** and **Other BC** are most likely to have visited in non-peak seasons (72% vs. 55% Interior, 63% Metro Vancouver)

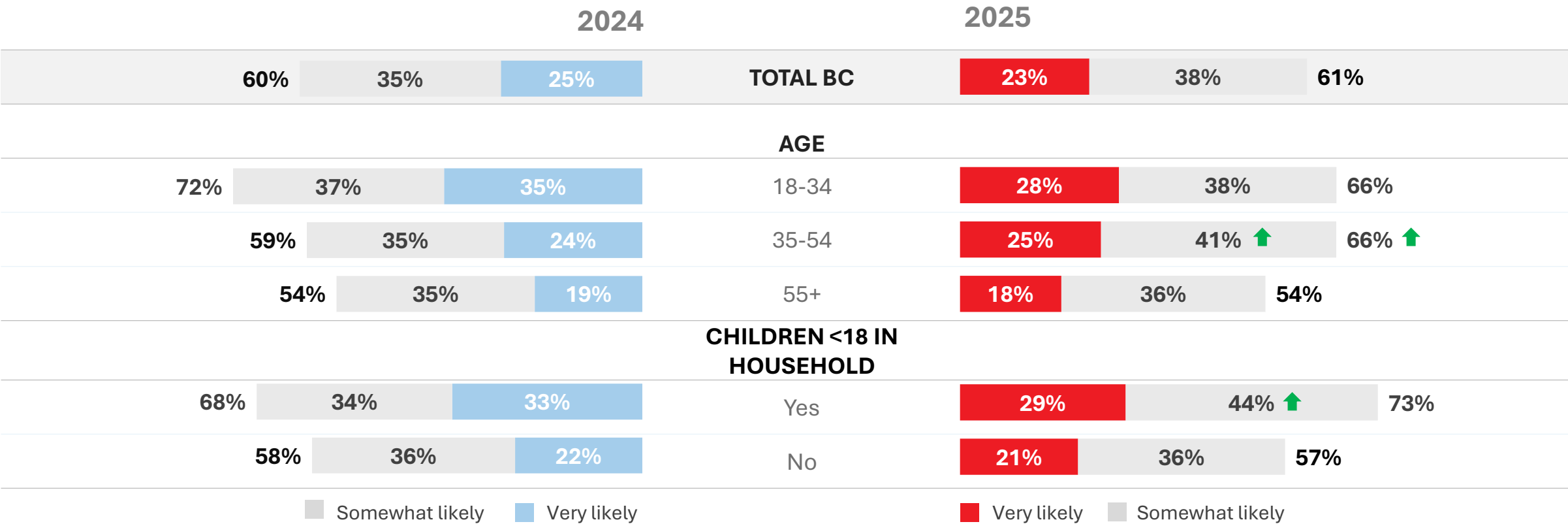
Future Visitation

The likelihood of visiting Tofino in the next five years remains steady among BC travellers at around 6-in-10 and is comparable to Whistler in overall likelihood. Encouragingly, while intent remains lower among AB travellers (38%), Tofino performs on par with key competitor Whistler suggesting it remains in the consideration set despite lower familiarity. Compared to last year, consideration of Ucluelet has increased significantly among BC travellers.



Future Visitation to Tofino – BC Demographics 2025 vs. 2024

Although overall likelihood to visit Tofino in the next five years remains stable, there has been a notable increase in consideration among BC travellers aged 35 to 54 compared to last year. Additionally, families with children in the household show a directional increase in intent to visit. These shifts suggest that Tourism Tofino’s marketing efforts are resonating with key target audiences.



Future Visitation to Tofino – By BC Demographics

Younger BC residents from Metro Vancouver and Interior BC continue to show the highest likelihood of visiting Tofino in the next five years. Likelihood also remains significantly higher among those with children in the household, suggesting that family travel remains a key audience. A closer look at the results shows that future intent to visit Tofino is directionally higher among those travelling with children 5 or under (77%) or 13 to 17 years (76%) compared to those with children aged 6 to 12 (71%).

Future Visitation (Very/Somewhat Likely)

Destinations	Total	Gender		Metro Vancouver Residents By Age			Interior BC Residents By Age			Children <18 in Household	
		Male	Female	18-34	35-54	55+	18-34	35-54	55+	With Children	Without Children
n=	1,503	701	796	252	308	340	58*	91*	153	355	1,148
Whistler, BC	64%	64%	64%	85%	84%	70%	65%	63%	25%	79%	59%
Tofino, BC	61%	58%	64%	64%	65%	53%	64%	64%	44%	73%	57%
Banff, AB	57%	58%	56%	70%	60%	49%	74%	70%	50%	68%	53%
Ucluelet, BC	46%	44%	47%	43%	48%	36%	42%	42%	33%	52%	44%
Revelstoke, BC	41%	43%	40%	42%	38%	31%	64%	69%	55%	48%	39%

B2. How likely are you to travel to each of the following destinations in the next 5 years?
Base: All BC respondents (n=1,503) *Small base size, interpret with caution.

Significantly higher than comparison group(s)

Future Visitation to Tofino – By AB Demographics

Future visitation to Tofino among AB travellers is strongest among younger adults, particularly those aged 18 to 34 in Calgary (51%). Likelihood to visit Tofino is also significantly higher among those with children and slightly higher than Whistler intent among those with children. These findings reinforce families as a key segment in the AB market and suggest that Tofino could hold stronger appeal than Whistler for family travel. Note that there are no significant differences in likelihood to visit Tofino based on the age of children in the travel party.

Future Visitation (Very/Somewhat Likely)

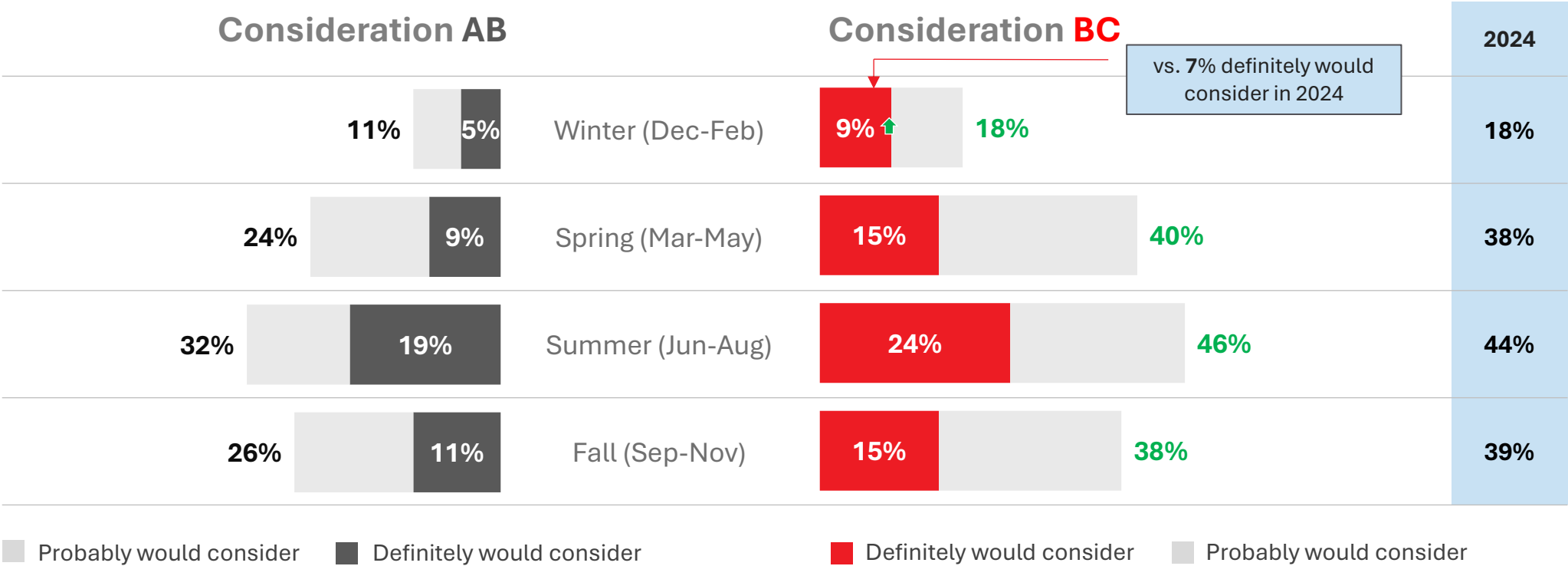
Destinations	Total	Gender		Calgary CMA			Edmonton CMA			Children <18 in Household	
		Male	Female	18-34	35-54	55+	18-34	35-54	55+	With Children	Without Children
n=	602	291	307	85*	113	103	92*	105	104	175	427
Banff, AB	85%	87%	84%	94%	92%	86%	85%	81%	73%	91%	83%
Revelstoke, BC	47%	48%	45%	62%	54%	48%	43%	41%	31%	52%	45%
Whistler, BC	38%	38%	39%	62%	39%	22%	52%	36%	21%	46%	35%
Tofino, BC	38%	37%	39%	51%	34%	34%	43%	43%	26%	48%	34%
Ucluelet, BC	24%	24%	23%	33%	23%	21%	29%	19%	18%	29%	22%

B2. How likely are you to travel to each of the following destinations in the next 5 years?
Base: All AB respondents (n=602)
*Small base size, interpret with caution.

Significantly higher than comparison group(s)

Likelihood to Consider Visiting Tofino During Different Seasons

Travellers remain most open to visiting Tofino during the summer. Consideration for spring and fall travel remains not far behind, highlighting ongoing opportunity to grow shoulder season travel. While winter remains the most challenging season for attracting visitors, definite consideration for visiting Tofino has increased significantly among BC travellers this year (9% vs. 7% in 2024). This suggests early signs of shifting perceptions around winter travel.



B3a. Now thinking about Tofino, BC specifically, in the next 5 years, how likely are you to consider visiting Tofino during the following times?
Base: Total AB 2025 (n=602); Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Likelihood to Consider Visiting Tofino – By BC Demographics

Among BC travellers, those aged 18 to 54 are the most likely to consider visiting Tofino across most seasons, with spring being the most appealing non-peak season. Men are more likely than women to consider visiting in the winter (22% vs. 15% women). Consistent with last year, Vancouver Island/Coast residents are significantly more likely to consider visiting Tofino during all seasons and are the group with highest consideration for non-peak season travel. Families with children are also more likely to consider Tofino across most seasons, particularly in summer. Interestingly, those with children aged 5 or under are more likely to consider visiting Tofino in the winter (41%) compared to those with children aged 6 to 12 (30%) or 13 to 17 (25%).

Consideration (Definitely/Probably)

Seasons	Total	Age			Region				Children <18 in Household	
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC	With Children	Without Children
	n= 1,503	376	489	638	900	302	151	150	355	1,148
Winter (Dec-Feb)	18%	26%	20%	13%	18%	13%	27%	18%	24%	17%
Spring (Mar-May)	40%	46%	43%	32%	39%	30%	54%	31%	48%	37%
Summer (Jun-Aug)	46%	53%	52%	37%	46%	41%	53%	38%	60%	42%
Fall (Sep-Nov)	38%	40%	39%	37%	37%	30%	53%	36%	42%	37%

B3a. Now thinking about Tofino, BC specifically, in the next 5 years, how likely are you to consider visiting Tofino during the following times?
Base: All respondents (n=1,503)

Statistically significantly higher than comparison group(s).

Likelihood to Consider Visiting Tofino – By AB Demographics

Among AB travellers, seasonal consideration for visiting Tofino is highest among younger adults aged 18 to 34 and those with children. Seasonal likelihood to visit Tofino does not differ significantly based on the age of children in the travel party.

Consideration (Definitely/Probably)

Seasons	Total	Age			Region		Children <18 in Household	
		18-34	35-54	55+	Calgary CMA	Edmonton CMA	With Children	Without Children
	n= 602	177	218	207	301	301	175	427
Winter (Dec-Feb)	11%	23%	7%	5%	11%	12%	16%	9%
Spring (Mar-May)	24%	35%	21%	16%	25%	23%	32%	20%
Summer (Jun-Aug)	32%	40%	33%	23%	32%	31%	42%	27%
Fall (Sep-Nov)	26%	35%	26%	18%	26%	26%	34%	23%

B3a. Now thinking about Tofino, BC specifically, in the next 5 years, how likely are you to consider visiting Tofino during the following times?
Base: All respondents (n=602)

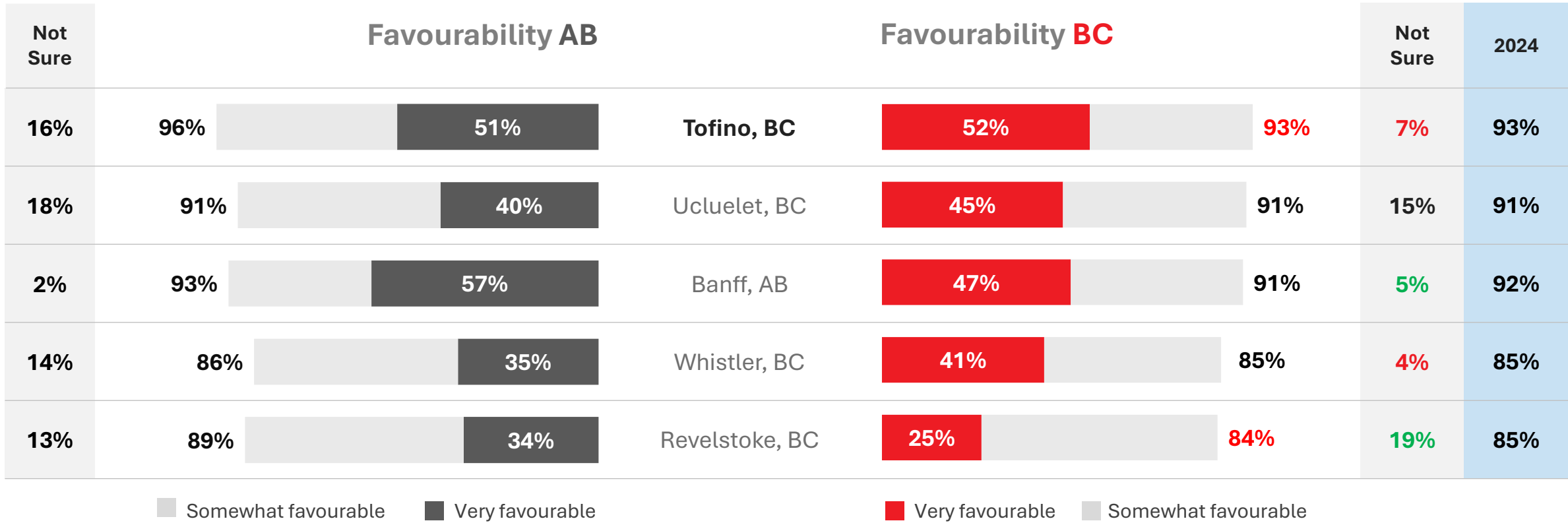
Significantly higher than comparison group(s)



Perceptions of Tofino

Overall Opinion of Travel Destinations

Tofino continues to enjoy strong favourability among BC travellers, consistent with 2024. It ranks highest among all destinations tested for both BC and AB audiences. Notably, AB travellers rate Tofino even more favourably than Banff and more positively than BC travellers themselves. While perceptions are consistent across age, gender, and region compared to last year, favourability has increased significantly among BC families with children (94% vs. 88% in 2024), indicating that efforts to highlight Tofino’s appeal among families is having a positive impact.

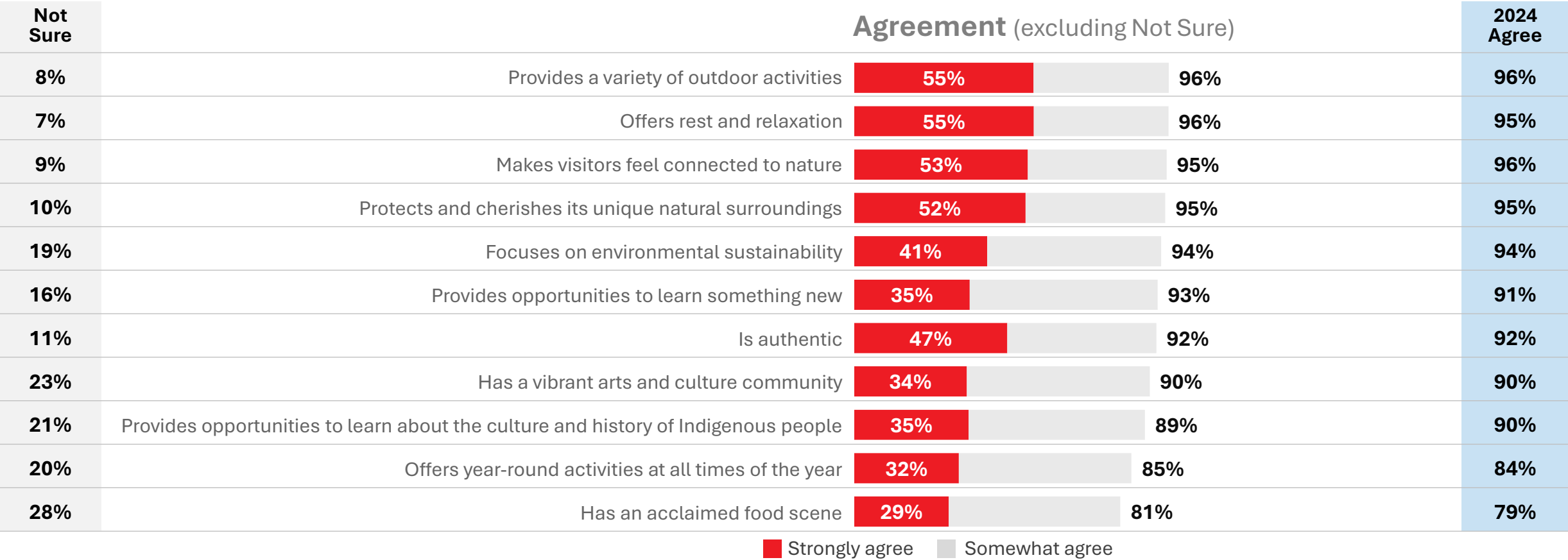


C1. How would you rate your overall opinion of each of the following travel destinations?
Base: AB/BC travellers with some familiarity with destination, excluding Not sure (n varies)

↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

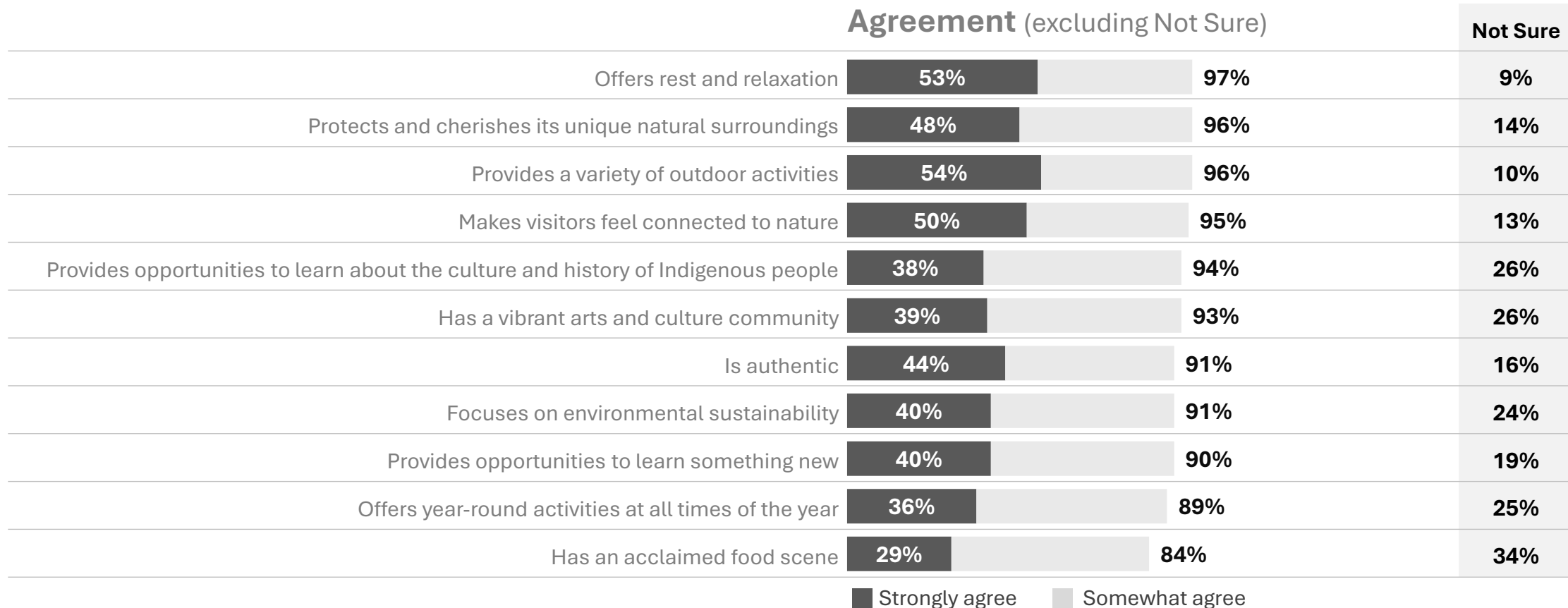
Perceptions of Tofino – BC Travellers

BC travellers with at least some familiarity with Tofino continue to hold very positive brand perceptions. The highest levels of “strongly agree” are for a variety of outdoor activities, rest and relaxation, making visitors feel connected to nature, and protects and cherishes its natural surroundings. However, a notable proportion of travellers remain unsure about Tofino’s food scene, its cultural and Indigenous offerings, and year-round activities. These areas continue to represent potential opportunities for Tourism Tofino to increase awareness and improve perceptions through targeted communication and promotion.



Perceptions of Tofino – AB Travellers

AB travellers familiar with Tofino also hold generally positive brand perceptions, with the highest levels of “strongly agree” for variety of outdoor activities, offers rest and relaxation, and connection to nature. Similar to BC travellers, high proportions of AB travellers are unsure about several attributes, in particular those related to Tofino’s acclaimed food scene, opportunities to learn about Indigenous culture, arts and culture community, year-round activities, and environmental sustainability.



Key Driver Analysis

The following slide shows the outcome of key driver analysis to better understand what factors are most important when choosing a travel destination.

Surveys often ask respondents to rate the importance of a series of attributes. While valuable information, it is often difficult for people to accurately rate how important something is. In addition, importance ratings do not necessarily tell us what is impacting people's opinions in a meaningful way.

Therefore, we use driver analysis to determine the extent to which specific attributes drive overall brand perception.

The subsequent slide shows the % share of importance for each attribute – how important each attribute is among the total of all attributes.

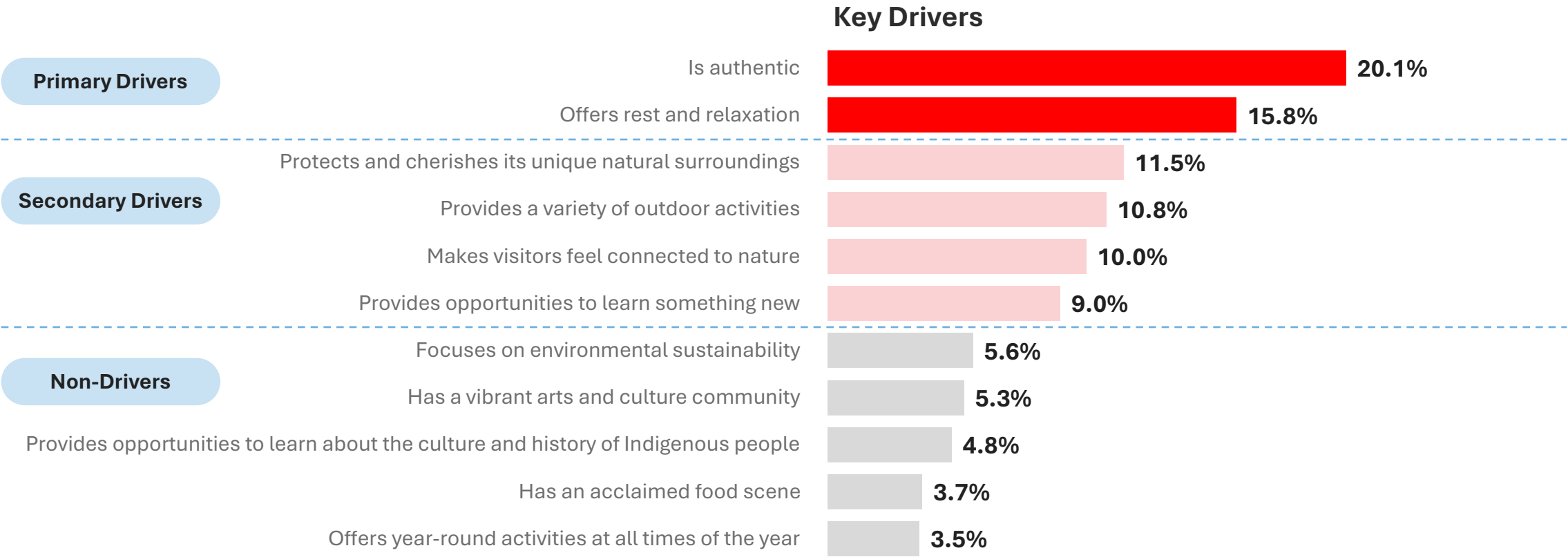
- The higher the %, the stronger that attribute is as a driver.
- The numbers are also proportionate. For example, a driver with 20% importance is twice as important as one with 10% importance.



Key Drivers of Overall Opinion of Tofino

Consistent with 2024, the top two drivers shaping perceptions of Tofino remain authenticity and offering rest and relaxation, with authenticity now the single most influential (20.1%). Efforts to reinforce these core features should remain central to marketing strategies. At the same time, supporting messages that highlight Tofino’s environmental preservation, diverse outdoor activities, and nature-based experiences can further strengthen Tofino’s appeal. “Provides opportunities to learn something new” has gained slightly in importance. Year-round activities, the food scene, and Indigenous learning opportunities remain less influential in shaping overall perceptions.

Key Drivers



Opportunity Grid

An opportunity grid (or performance grid) is a strategic tool used to depict key strengths and weaknesses by comparing brand perceptions against the most important factors driving overall perception. The following slide presents the opportunity grid for Tourism Tofino.

- **KEY STRENGTHS (High Importance, Strong Performance)**

Tofino continues to excel in several key areas that are important to BC travellers: authenticity, rest and relaxation, preservation of its unique natural surroundings, diverse outdoor activities, and deep connection to nature. These strengths have remained consistent year over year, reinforcing their role as foundational elements of Tofino's brand. This consistent performance points to a visitor experience that is both memorable and meaningful, one that continues to encourage repeat visitation and positive word-of-mouth.

- **KEY WEAKNESSES (High Importance, Weak Performance)**

Once again, no factors emerge as critical improvement areas, which shows that Tofino is continuing to deliver on the areas that matter most to travellers.

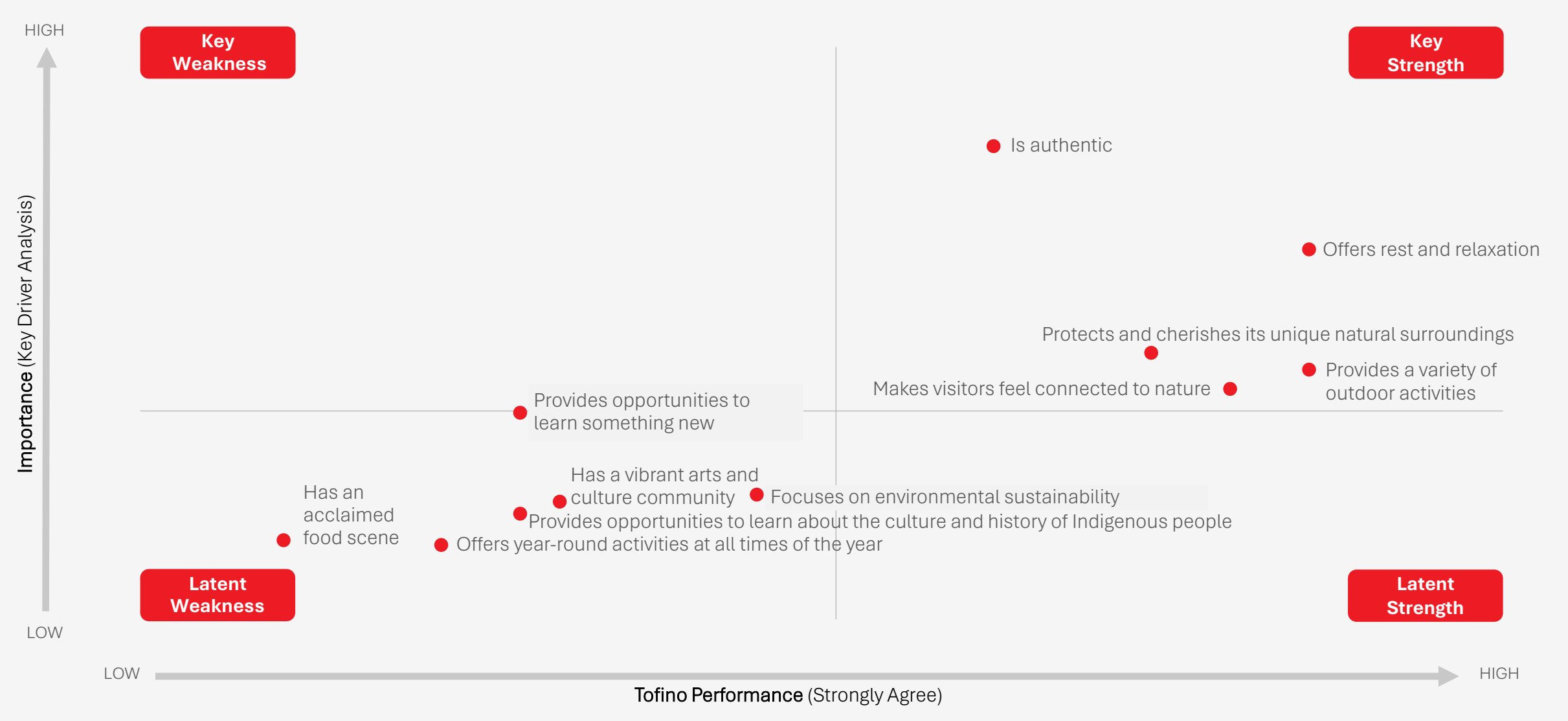
- **LATENT STRENGTHS (Low Importance, Strong Performance)**

No attributes fall into the Latent Strength quadrant in 2025 – a shift from 2024 when environmental sustainability was included here.

- **LATENT WEAKNESSES (Low Importance, Weak Performance)**

Tofino's food scene, year-round activity offerings, arts and culture community, and opportunities to learn (both in general and about Indigenous history and culture) fall into this quadrant. While not currently top priorities for travellers, these areas continue to represent untapped potential. Enhancing or repositioning them could broaden Tofino's appeal. For example, integrating local art into natural settings or pairing outdoor excursions with cultural education could enrich the overall visitor experience while remaining aligned with Tofino's brand and long-term sustainability goals.

Tourism Tofino Opportunity Grid

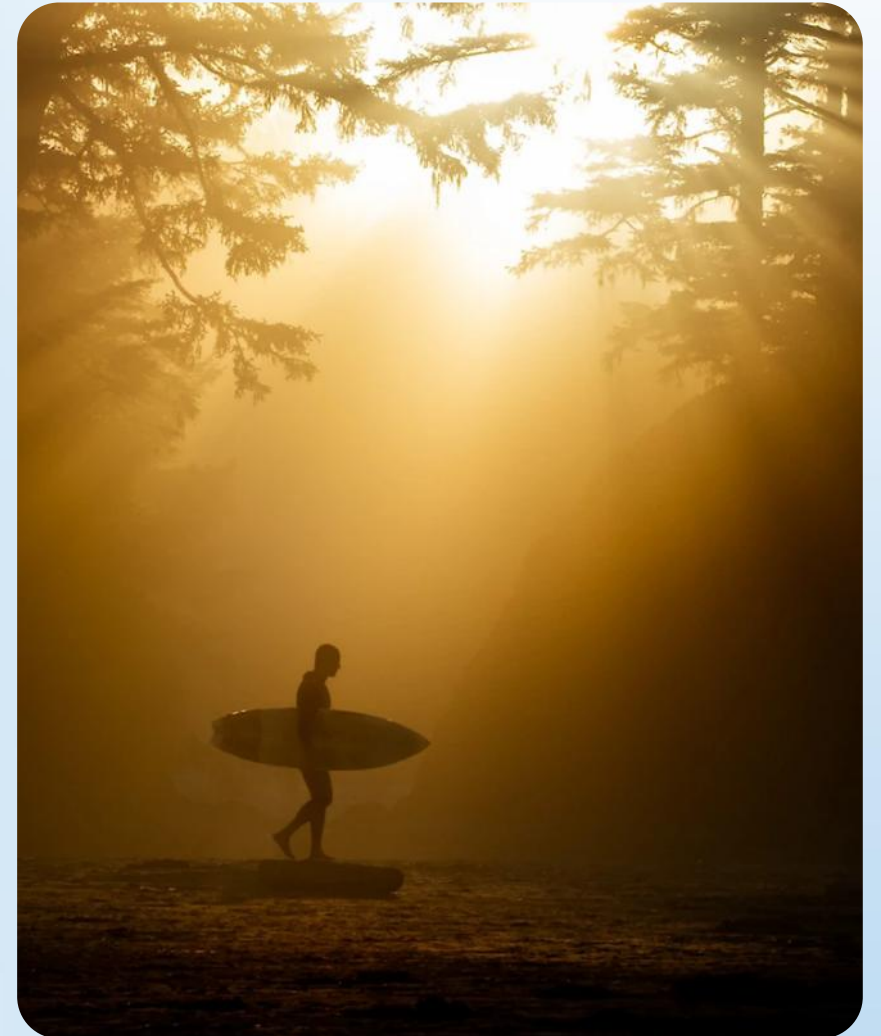




Motivations, Barriers, & Desired Activities

Survey participants were provided with the following description of Tofino before being asked about their travel motivations, barriers, and desired activities.

“Tofino is a destination that connects the raw beauty of the ocean and forest. Situated within the traditional territory of the Tla-o-qui-aht First Nation, Tofino is surrounded by the breathtaking expanse of the UNESCO Clayoquot Sound Biosphere Region – cherished for its profound biodiversity. Tofino also offers a celebrated food scene, a vibrant arts culture, and focuses on environmental sustainability and regenerative tourism.”



Top Motivations for Travelling to Tofino

Natural beauty remains the top motivator for visiting Tofino, with 3-in-5 BC and AB travellers selecting it. Ocean and forest experiences also rank highly, motivating around 4-in-10 in both markets. Among BC travellers, located within home province has increased in 2025 (36%, up from 33% in 2024). Compared to AB travellers, BC travellers show greater interest in storm watching, likely due to familiarity and access. Interestingly, several factors resonate more with AB travellers, such as Tofino’s food scene, low crowds, safety and inclusivity, and outdoor activities, which highlights the potential to tailor messaging by market.

Motivating Factors AB		Motivating Factors BC		2024
60%		Natural beauty	60%	63%
40%		Provides ocean and forest experiences	43%	45%
N/A		Located within my home province	36% ↑	33%
22%		Small town experience	23%	21%
9%		Provides storm watching opportunities	23%	20%
29%		Good food scene	22%	24%
26%		Not overly crowded	21%	21%
25%		Offers variety of outdoor activities	20%	21%
26%		Safe and inclusive	19%	18%
17%		Offers water-based activities	17%	15%

D1. Which of the following factors are most motivating for you personally when considering travelling to Tofino?
Base: Total AB 2025 (n=602; Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Top Motivations for Travelling to Tofino *(Continued)*

Abundance of wildlife is less motivating for BC travellers compared to 2024. Motivations related to Indigenous experiences and sustainability continue to rank lower on the list of motivations for visiting Tofino.

Motivating Factors AB		Motivating Factors BC		2024
22%	<div></div>	Abundance of wildlife	<div></div> 17% ↓	22%
20%	<div></div>	Family friendly	<div></div> 16%	16%
17%	<div></div>	Easy to get to	<div></div> 16%	16%
17%	<div></div>	Good local arts and culture	<div></div> 13%	14%
11%	<div></div>	Seasonal events/attractions	<div></div> 12%	11%
13%	<div></div>	Recommendations from family/friends	<div></div> 12%	11%
12%	<div></div>	Supports Indigenous-owned businesses and tourism operators	<div></div> 11%	12%
12%	<div></div>	Sustainable tourism destination	<div></div> 10%	11%
9%	<div></div>	Learning about the culture of the Tla-o-qui-aht First Nation	<div></div> 9%	9%

D1. Which of the following factors are most motivating for you personally when considering travelling to Tofino?
Base: Total AB 2025 (n=602; Total BC 2024 (n=1,612), 2025 (n=1,503)

↑↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Motivations for Travelling to Tofino – By BC Demographics

Natural beauty and ocean/forest experiences remain the top motivators across all BC age groups, with interest increasing significantly among travellers age 35+.

Proximity is a strong draw for residents age 55+. Older travellers are also more likely to value Tofino’s small-town experience and storm watching opportunities.

Compared to older travellers, those aged 18 to 34 are more motivated by water-based activities, safety and inclusivity, family friendly, and sustainable tourism, suggesting greater openness to experience-based and values-driven travel.

Motivating Factors		Total	Age		
			18-34	35-54	55+
	n=	1,503	376	489	638
Natural beauty		60%	50%	59%	68%
Provides ocean and forest experiences		43%	33%	41%	51%
Located within my home province		36%	25%	31%	48%
Small-town experience		23%	19%	24%	25%
Provides storm watching opportunities		23%	14%	20%	30%
Good food scene		22%	24%	23%	20%
Not overly crowded		21%	20%	25%	18%
Offers variety of outdoor activities		20%	24%	18%	19%
Safe and inclusive		19%	23%	19%	16%
Offers water-based activities		17%	23%	18%	13%
Abundance of wildlife		17%	15%	21%	15%
Family friendly		16%	19%	23%	9%
Recommendations from family/friends		12%	16%	11%	10%
Sustainable tourism destination		10%	13%	9%	8%

Motivations for Travelling to Tofino – By AB Demographics

Motivations are more mixed across age groups among AB travellers, but some clear patterns emerge.

Older travellers (55+) are most likely to be drawn by natural beauty, ocean and forest experiences, fewer crowds, and a small-town experience.

In contrast, younger travellers aged 18 to 34 show greater interest in wildlife, ease of access, family friendly, as well as values-based motivations such as sustainability and support for Indigenous-owned businesses.

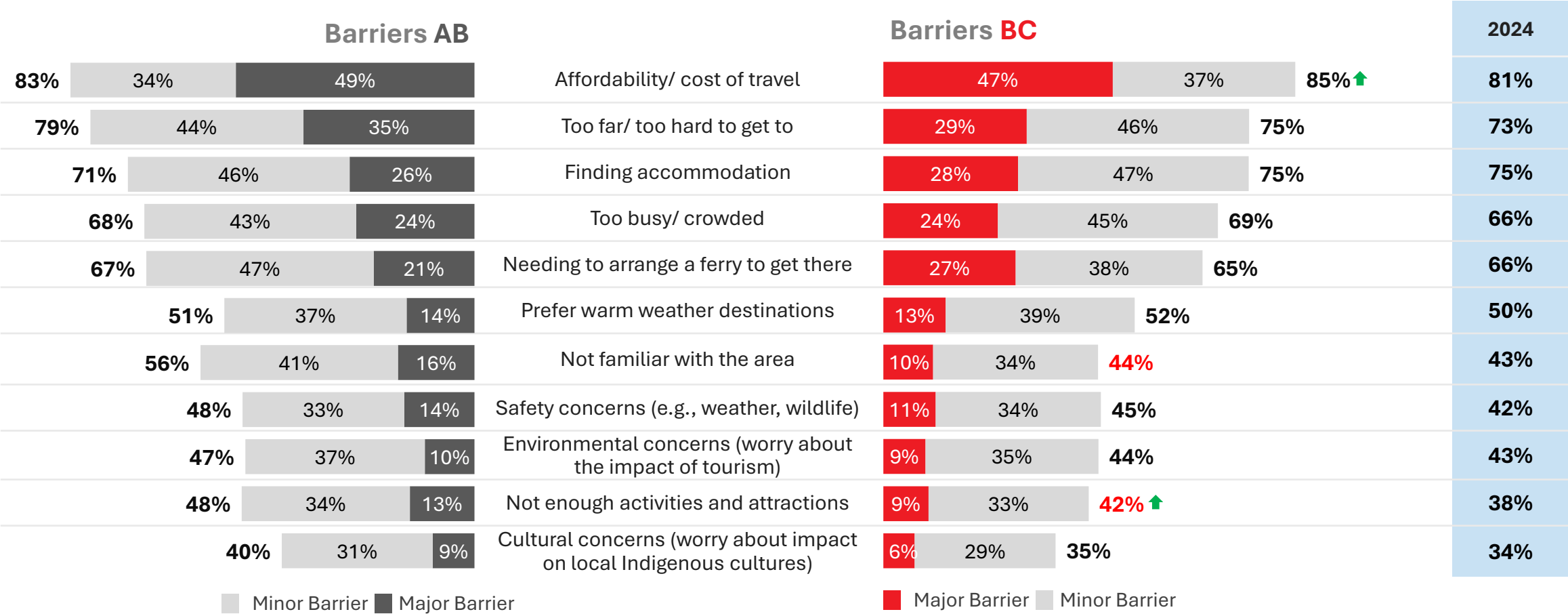
Motivating Factors	Total	Age		
		18-34	35-54	55+
	n= 602	177	218	207
Natural beauty	60%	50%	61%	68%
Provides ocean and forest experiences	40%	30%	40%	49%
Not overly crowded	26%	23%	22%	33%
Offers variety of outdoor activities	25%	24%	30%	21%
Abundance of wildlife	22%	27%	22%	17%
Small-town experience	22%	18%	19%	29%
Family friendly	20%	22%	26%	11%
Easy to get to	17%	24%	17%	10%
Recommendations from family/friends	13%	10%	17%	13%
Supports Indigenous-owned businesses and tourism operators	12%	15%	8%	14%
Sustainable tourism destination	12%	21%	8%	8%
Seasonal events/attractions	11%	16%	10%	6%
Provides storm watching opportunities	9%	7%	7%	13%

D1. Which of the following factors are most motivating for you personally when considering travelling to Tofino?
Base: Total AB 2025 (n=602) Note: Table shows only motivators with significant differences

Statistically significantly higher than comparison group(s).

Barriers to Visiting Tofino

The top five barriers to visiting Tofino are consistent among both BC and AB travellers. Affordability remains the most common concern, with over 8-in-10 travellers citing it as a barrier and nearly half identifying it as a major barrier. Among BC travellers, affordability increased as a barrier since 2024. Other key barriers include too hard to get to and finding accommodation, with more than 7-in-10 in both markets affected. Notably, concern about a lack of activities and attractions has risen among BC travellers compared to last year.



D2. How much of barrier, if at all, is each of the following for you personally when considering travelling to Tofino?
Base: Total AB 2025 (n=602; Total BC 2024 (n=1,612), 2025 (n=1,503)

↑↓ Statistically significantly higher/lower than 2024.
Statistically significantly higher/lower than AB.

Barriers to Visiting Tofino – By BC Demographics

Affordability, too far/hard to get to, and finding accommodation are key barriers across all BC age groups and most regions. Younger travellers aged 18 to 34 report significantly more barriers across nearly all categories. Those with children are more likely to see a lack of activities and attractions and limited familiarity with the area as barriers. This highlights an opportunity to better promote family-friendly experiences and increase awareness among families.

Barriers	Total	Age			Region				Children <18 in Household	
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC	With Children	Without children
n=	1,503	376	489	638	900	302	151	150	355	1,148
Affordability/ cost of travel	85%	87%	87%	81%	84%	85%	86%	81%	88%	83%
Too far/ too hard to get to	75%	81%	78%	70%	76%	78%	70%	78%	78%	74%
Finding accommodation	75%	77%	74%	75%	74%	74%	79%	74%	78%	74%
Too busy/ crowded	69%	76%	66%	66%	69%	66%	73%	62%	73%	67%
Need to arrange a ferry to get there	65%	69%	69%	61%	73%	77%	28%	71%	67%	65%
Prefer warm weather destinations	52%	56%	51%	49%	55%	52%	43%	43%	57%	50%
Safety concerns	45%	59%	41%	38%	50%	39%	40%	31%	48%	44%
Environmental concerns	44%	55%	41%	39%	47%	44%	37%	37%	46%	43%
Not familiar with the area	44%	60%	44%	34%	49%	43%	31%	43%	50%	42%
Not enough activities & attractions	42%	58%	46%	29%	48%	37%	35%	33%	54%	38%
Cultural concerns	35%	52%	34%	26%	37%	33%	34%	28%	39%	34%

Barriers to Visiting Tofino – By AB Demographics

Distance, finding accommodation, and crowds are more of a barrier for Calgary residents than Edmonton residents. Similar to BC travellers, younger AB travellers aged 18 to 34 report significantly higher levels of concern across a wide range of barriers, including finding accommodation, unfamiliarity, lack of activities, and safety, environmental and cultural concerns.

Barriers	Total	Age			Region	
		18-34	35-54	55+	Calgary CMA	Edmonton CMA
n=	602	177	218	207	301	301
Affordability / cost of travel	83%	83%	83%	83%	85%	80%
Too far / too hard to get to	79%	78%	77%	82%	82%	75%
Finding accommodation	71%	75%	65%	75%	76%	66%
Too busy / crowded	68%	71%	67%	65%	72%	64%
Needing to arrange a ferry to get there	67%	72%	66%	66%	70%	64%
Not familiar with the area	56%	66%	52%	53%	58%	55%
Prefer warm weather destinations	51%	55%	47%	53%	54%	49%
Not enough activities and attractions	48%	66%	42%	38%	51%	45%
Safety concerns	48%	64%	39%	42%	49%	47%
Environmental concerns	47%	58%	43%	41%	45%	49%
Cultural concerns	40%	52%	33%	36%	41%	38%

Encouraging Off-Season Visitation to Tofino (Unaided)

When asked about what would encourage visitation during the non-peak season, the top responses from both BC and AB travellers was related to affordability. BC travellers are more likely to say reduced accommodation costs would encourage visitation, as well as storm watching and activities.

Encouraging Factors AB		Encouraging Factors BC		2024
18%	<div></div>	Lower cost/ affordability in general	<div></div> 17%	17%
10%	<div></div>	Lower cost of accommodation	<div></div> 16%	16%
14%	<div></div>	Less crowded	<div></div> 14%	15%
1%	<div></div>	Storm watching season and activities	<div></div> 9%	7%
8%	<div></div>	Good weather	<div></div> 8%	7%
6%	<div></div>	Discounts/ deals/ promotions	<div></div> 6%	6%
6%	<div></div>	Beautiful scenery/ wildlife/ nature	<div></div> 4%	3%
7%	<div></div>	Seasonal activities	<div></div> 4%	4%
4%	<div></div>	Discounts on accommodations	<div></div> 4% ↓	7%
5%	<div></div>	Lower cost of travel	<div></div> 2%	1%

Reduced rates, information on the expected frequency of storms, subsidized transport there from the ferries.

– BC traveller

Cheaper flights or arranged trips from Calgary as well as affordable hotels/accommodations.

– AB traveller

Encouraging Off-Season Visitation to Tofino (Aided)

When provided with a list of factors that may encourage visitation to Tofino during the off-season, lower prices remains the most effective incentive, cited by nearly three-quarters of BC travellers and two-thirds of AB travellers. Promotional offers also rank highly across both markets. Seasonal nature-based activities remains a strong motivator BC travellers, while relaxation is among the top three for AB travellers.

Encouraging Factors AB		Encouraging Factors BC		2024
68%		Lower prices	73%	75%
58%		Promotional offers	57%	59%
29%		Seasonal nature based activities	41%	40%
35%		More relaxation/wellness activities	32%	31%
32%		Special events	31%	30%
33%		More wildlife viewing activities	29%	30%
22%		Wine/ beer-tasting sessions	22%	23%
20%		Traditional indigenous food experiences	20%	23%
17%		Indigenous arts and cultural activities	17%	19%
12%		Culinary classes	11%	12%
7%		Opportunity to volunteer while visiting	7%	6%

Encouraging Off-Season Visitation – By BC Demographics

Women are more likely than men to be interested in nearly all off-season travel incentives tested in the survey. Younger travellers are more likely to be encouraged by relaxation activities, wine/beer tasting, and Indigenous food experiences. Older travellers prioritize lower prices, promotional offers, and seasonal nature-based activities, but also show interest in Indigenous food and cultural experiences.

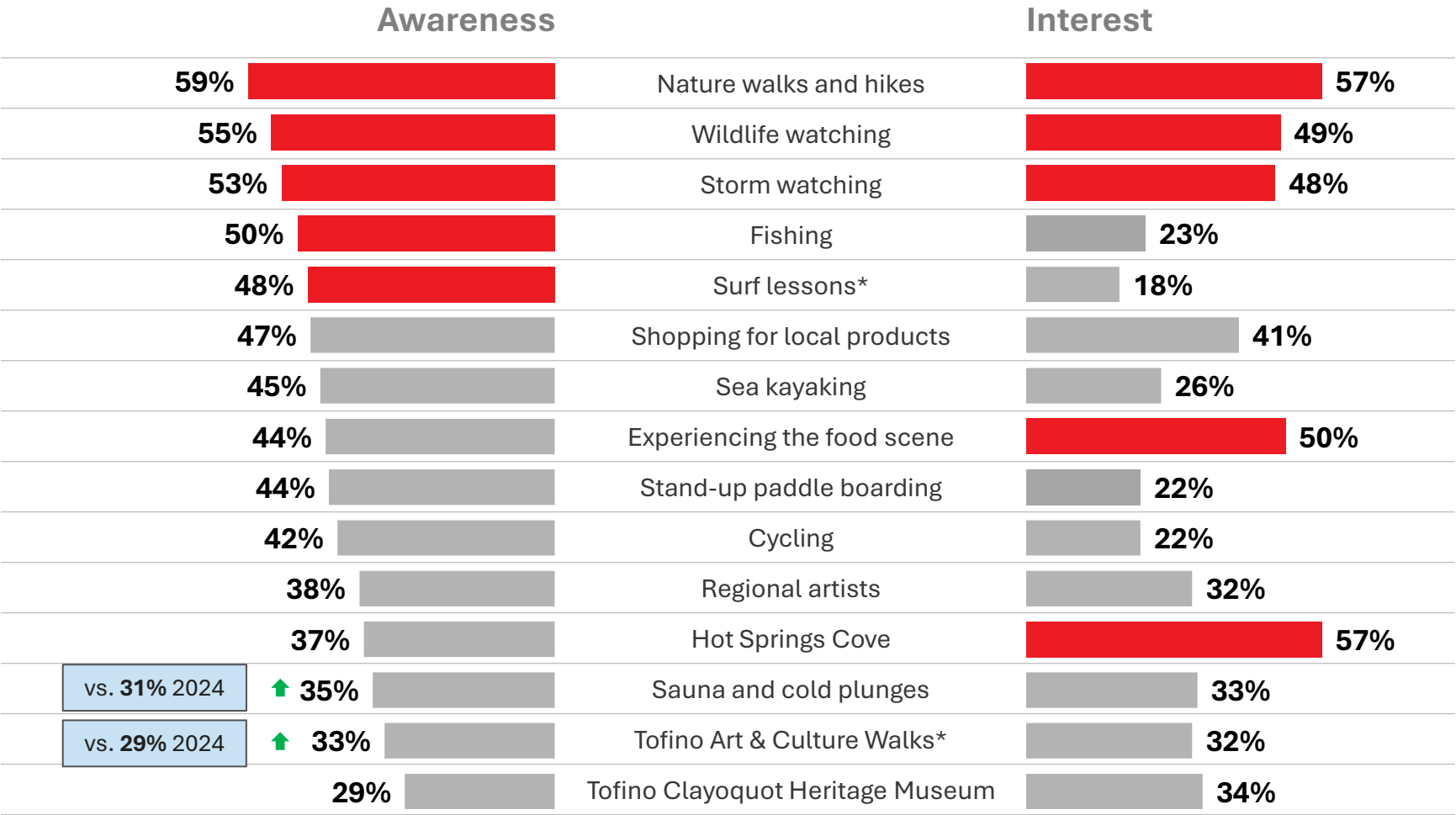
Off-Peak Travel Incentives/Activities		Gender		Age		
		Men	Women	18-34	35-54	55+
	n= 1,503	701	796	376	489	638
Lower prices	73%	69%	77%	64%	76%	77%
Promotional offers	57%	49%	65%	46%	60%	62%
Seasonal nature-based activities	41%	39%	43%	36%	39%	46%
More relaxation/ wellness activities	32%	25%	37%	38%	35%	25%
Special events	31%	27%	34%	33%	32%	28%
More wildlife viewing opportunities	29%	29%	30%	30%	27%	30%
Wine/ beer-tasting sessions	22%	22%	21%	25%	22%	19%
Traditional Indigenous food experiences	20%	17%	24%	24%	16%	21%
Indigenous arts and cultural activities	17%	14%	21%	15%	16%	21%
Culinary classes	11%	9%	14%	11%	11%	12%
Opportunity to volunteer while visiting	7%	8%	6%	12%	6%	4%

Awareness & Interest in Tofino Activities - BC

Nature walks, wildlife watching, and storm watching continue to lead in both awareness and interest among BC travellers, reaffirming their strength as core off-season activities. Although awareness of fishing and surf lessons is high, interest is lower.

Encouragingly, awareness of sauna and cold plunges and Tofino Art & Culture Walks has improved since 2024.

Hot Springs Cove and the local food scene generate high interest, but lower awareness levels continue to suggest an opportunity to boost visibility and capitalize on these interests.



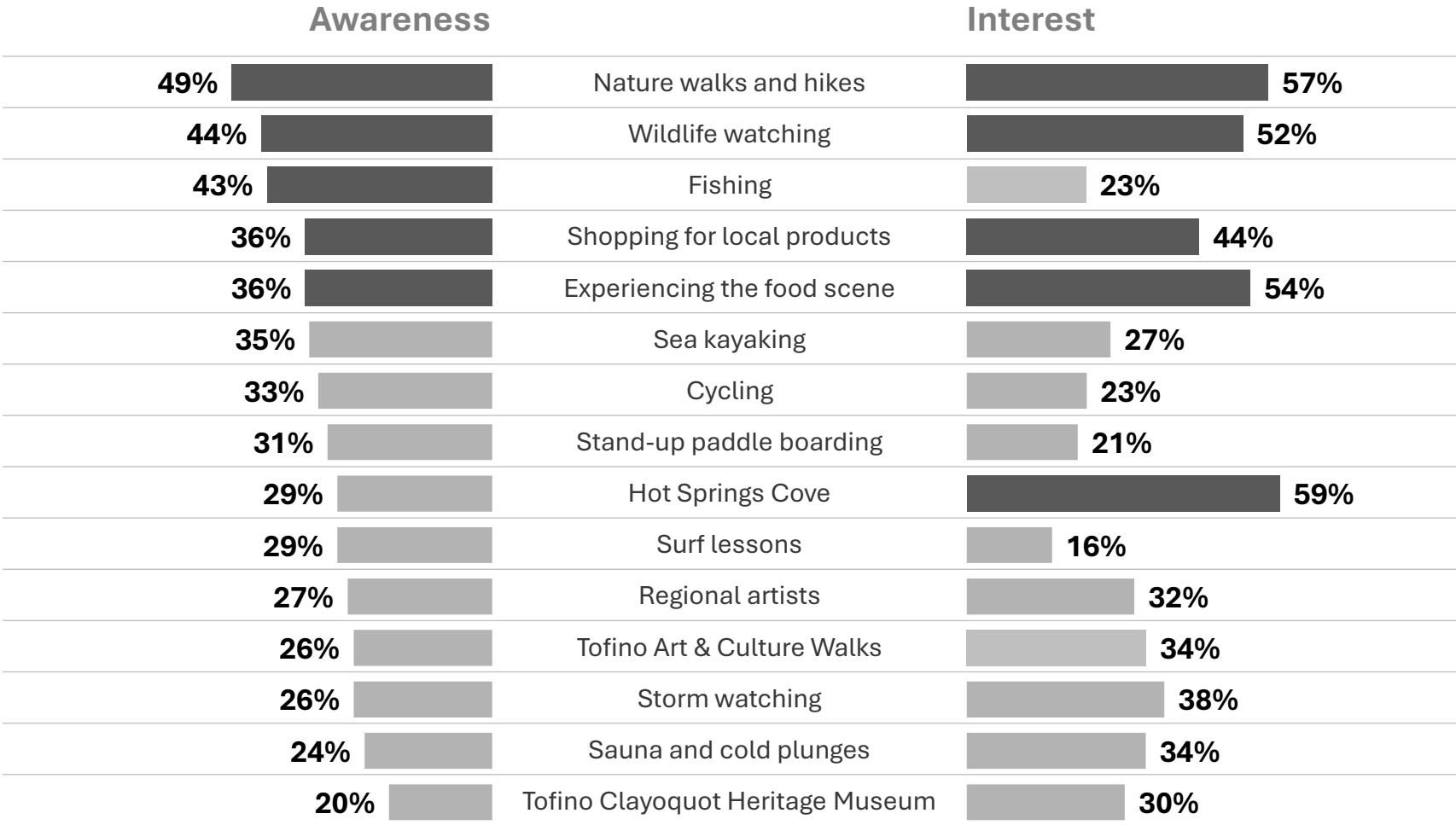
D3. Following are activities, events, and offerings in Tofino during the off-peak season (October to April). Which of these, if any, were you aware of before now and which, if any, would you be interested in doing or experiencing? *Note: wording changed from ‘surfing’ to ‘surf lessons’ and ‘Tofino Art Gallery Walk’ to ‘Tofino Art & Culture Walks’ in 2025.
Base: Total BC 2024 (n=1,612), 2025 (n=1,503)

↑ ↓ Statistically significantly higher/lower than 2024.

Awareness & Interest in Tofino Activities - AB

Compared to BC travellers, Alberta visitors tend to have lower awareness of most Tofino activities, but interest remains strong for several key experiences.

Hot Springs Cove stands out as the top area of interest but remains under the radar in terms of awareness. Similarly, Tofino’s food scene and shopping for local products generate high interest with relatively low awareness. These results highlight a strong opportunity for targeted promotions.



Awareness & Interest in Tofino Activities 2025 - BC vs. AB

Across both markets, nature-based activities lead in both awareness and interest, with nature walks and wildlife watching ranking in the top two. The local food scene is also a strong draw, though lower awareness suggests an opportunity to boost visibility.

Hot Springs Cove is the most compelling experience overall, topping the list for interest in both provinces.

While BC travellers are more familiar with a broader range of Tofino activities, AB travellers express equal or higher interest in several offerings, highlighting an opportunity to close the awareness gap.

Top Activities **AWARE OF**

#	BC	%
1	Nature walks and hikes	59%
2	Wildlife watching	55%
3	Storm watching	53%
4	Fishing	50%
5	Surf Lessons	48%

#	AB	%
1	Nature walks and hikes	49%
2	Wildlife watching	44%
3	Fishing	43%
4	Shopping for local products	36%
5	Experiencing the local food scene	36%

Top Activities **INTERESTED IN**

#	BC	%
1	Hot Springs Cove	57%
2	Nature walks and hikes	57%
3	Experiencing the local food scene	50%
4	Wildlife watching	49%
5	Storm watching	48%

#	AB	%
1	Hot Springs Cove	59%
2	Nature walks and hikes	57%
3	Experiencing the local food scene	54%
4	Wildlife watching	52%
5	Shopping for local products	44%

D3. Following are activities, events, and offerings in Tofino during the off-peak season (October to April). Which of these, if any, were you aware of before now and which, if any, would you be interested in doing or experiencing?
Base: Total AB 2025 (n=602); Total BC 2025 (n=1,503)

Interest in Tofino Activities – By BC Demographics

Women are more likely to be interested in relaxation, nature-based, and cultural activities, while men gravitate toward physical pursuits like kayaking, fishing, cycling, and surf lessons. Younger travellers and those with children prefer active experiences such as sauna/cold plunges kayaking, paddleboarding, cycling, and surf lessons. Older travellers show more interest in reflective/cultural activities like storm watching, regional art, and the heritage museum.

Activities Interested In	Total	Gender		Age			Children <18 in Household	
		Men	Women	18-34	35-54	55+	With Children	Without children
n=	1,503	701	796	376	489	638	355	1148
Hot Springs Cove	57%	53%	61%	57%	60%	55%	55%	58%
Nature walks and hikes	57%	51%	62%	54%	60%	56%	60%	56%
Experiencing the food scene	50%	44%	54%	49%	51%	48%	50%	49%
Wildlife watching	49%	46%	52%	46%	53%	48%	51%	49%
Storm watching	48%	46%	49%	39%	50%	52%	46%	48%
Shopping for local products	41%	31%	50%	44%	40%	40%	42%	41%
Tofino Clayoquot Heritage Museum	34%	29%	38%	29%	29%	40%	27%	36%
Sauna and cold plunges	33%	31%	34%	42%	39%	22%	39%	31%
Tofino Art & Culture Walks	32%	28%	36%	31%	28%	36%	28%	34%
Regional artists	32%	26%	38%	28%	30%	37%	29%	33%
Sea kayaking	26%	29%	23%	36%	31%	15%	33%	23%
Fishing	23%	27%	19%	26%	21%	22%	25%	22%
Stand-up paddle boarding	22%	21%	23%	32%	28%	10%	32%	19%
Cycling	22%	25%	18%	27%	23%	17%	26%	20%
Surf lessons	18%	21%	16%	29%	21%	9%	25%	16%

Interest in Tofino Activities – By AB Demographics

Patterns in Alberta largely mirror those seen in BC. Women show greater interest in wellness, nature, and cultural activities. Younger travellers are more drawn to active experiences, while older travellers are more interested in regional art.

Activities Interested In	Total	Gender		Age			Children <18 in Household	
		Men	Women	18-34	35-54	55+	With Children	Without children
n=	602	291	307	177	218	207	175	427
Hot Springs Cove	59%	51%	68%	52%	65%	60%	58%	60%
Nature walks and hikes	57%	51%	63%	55%	59%	58%	55%	58%
Experiencing the food scene	54%	50%	58%	52%	55%	54%	48%	56%
Wildlife watching	52%	46%	59%	56%	52%	50%	50%	53%
Shopping for local products	44%	34%	54%	45%	46%	41%	41%	45%
Storm watching	38%	35%	40%	34%	39%	40%	31%	40%
Tofino Art & Culture Walks	34%	29%	39%	36%	29%	38%	28%	37%
Sauna and cold plunges	34%	30%	38%	39%	42%	21%	35%	34%
Regional artists	32%	28%	36%	28%	28%	39%	24%	35%
Tofino Clayoquot Heritage Museum	30%	26%	34%	29%	27%	34%	27%	31%
Sea kayaking	27%	26%	29%	32%	32%	17%	34%	24%
Cycling	23%	24%	22%	33%	21%	16%	25%	22%
Fishing	23%	27%	18%	27%	25%	16%	29%	20%
Stand-up paddle boarding	21%	19%	24%	25%	24%	13%	24%	20%
Surf lessons	16%	16%	17%	25%	15%	9%	21%	14%

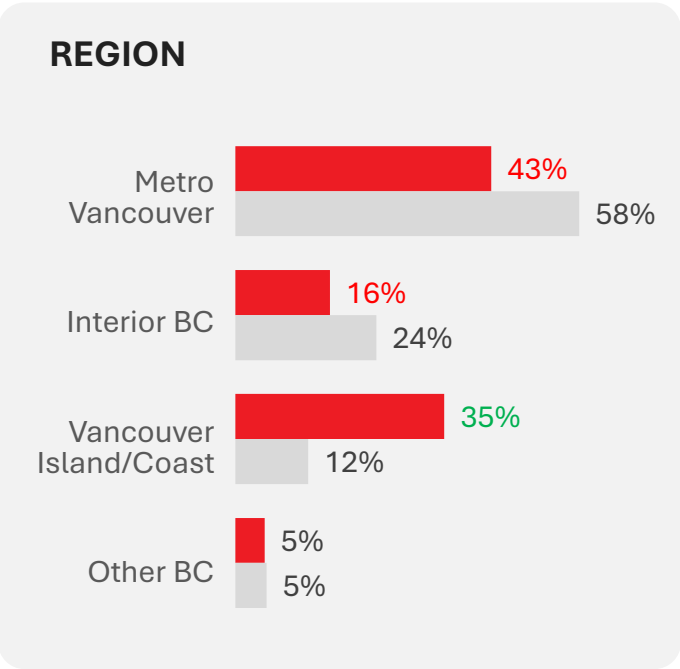
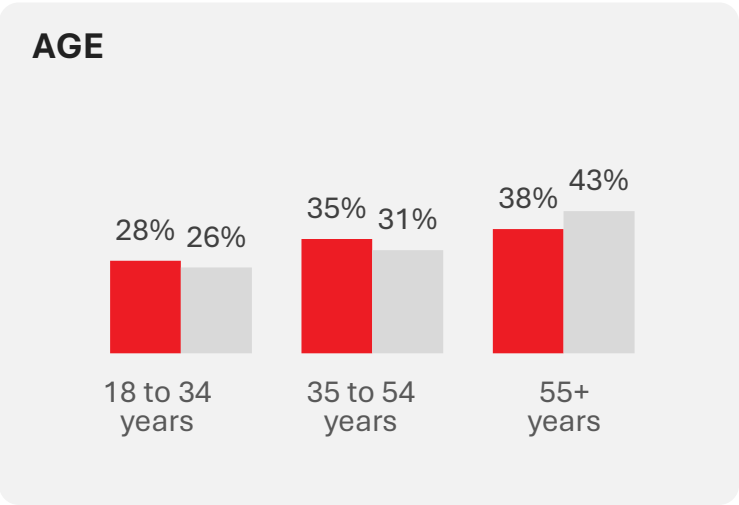
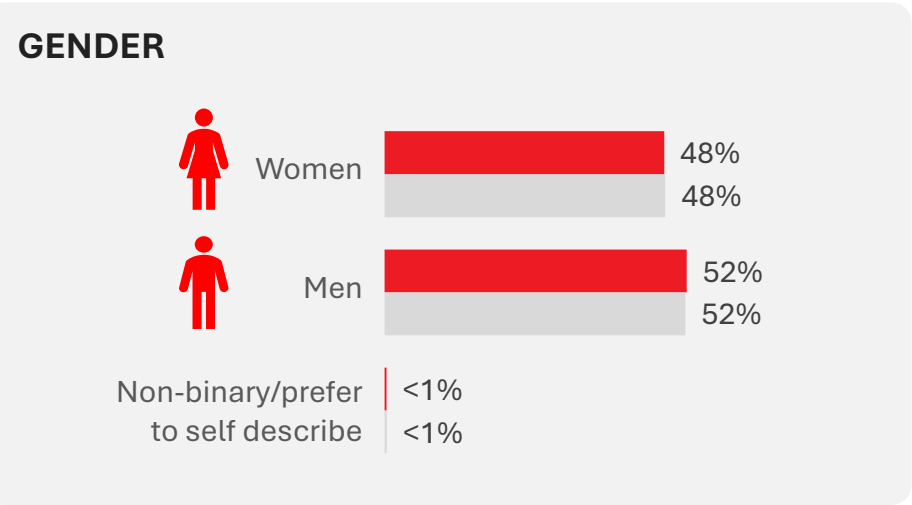
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Respondent Profile



Tofino Visitor Profile - BC

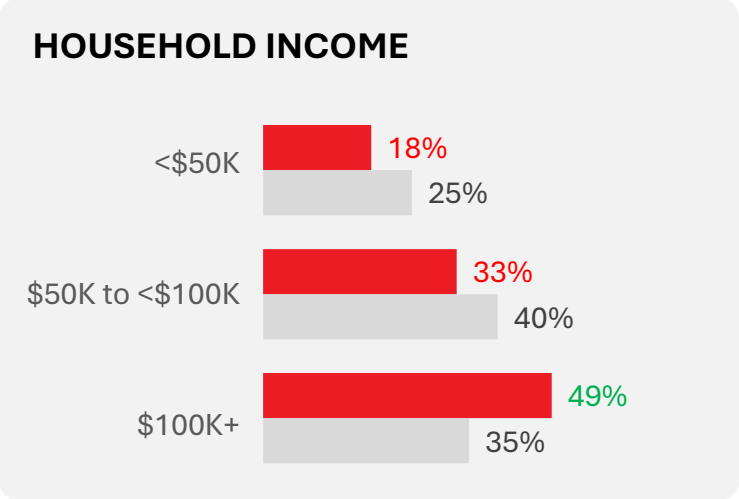
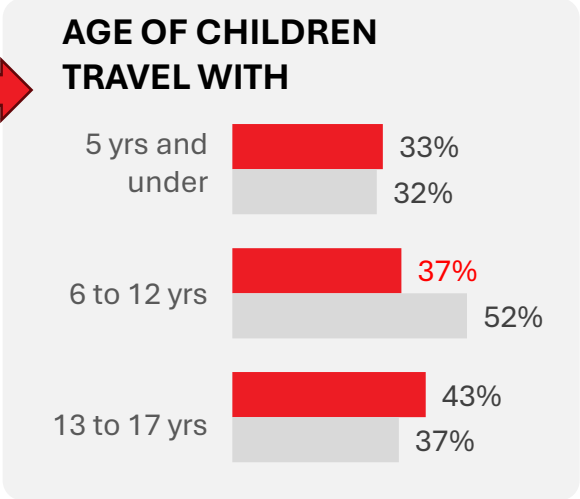
Past Tofino Visitor (n=387)
Non-Past Tofino Visitor (n=1,116)



CHILDREN <18 IN HOUSEHOLD

Past Visitor
26% YES

Non-Past Visitor
23% YES



Conclusion

Compared to non-visitors, past 5-year Tofino visitors are **more** likely to reside on Vancouver Island/Coast, have higher incomes, and are **less** likely to travel with children aged 6 to 12 years old.

Contact Us

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