



Report

Brand Awareness and Perception Study



Date: June 7, 2024
Project: 43286-001



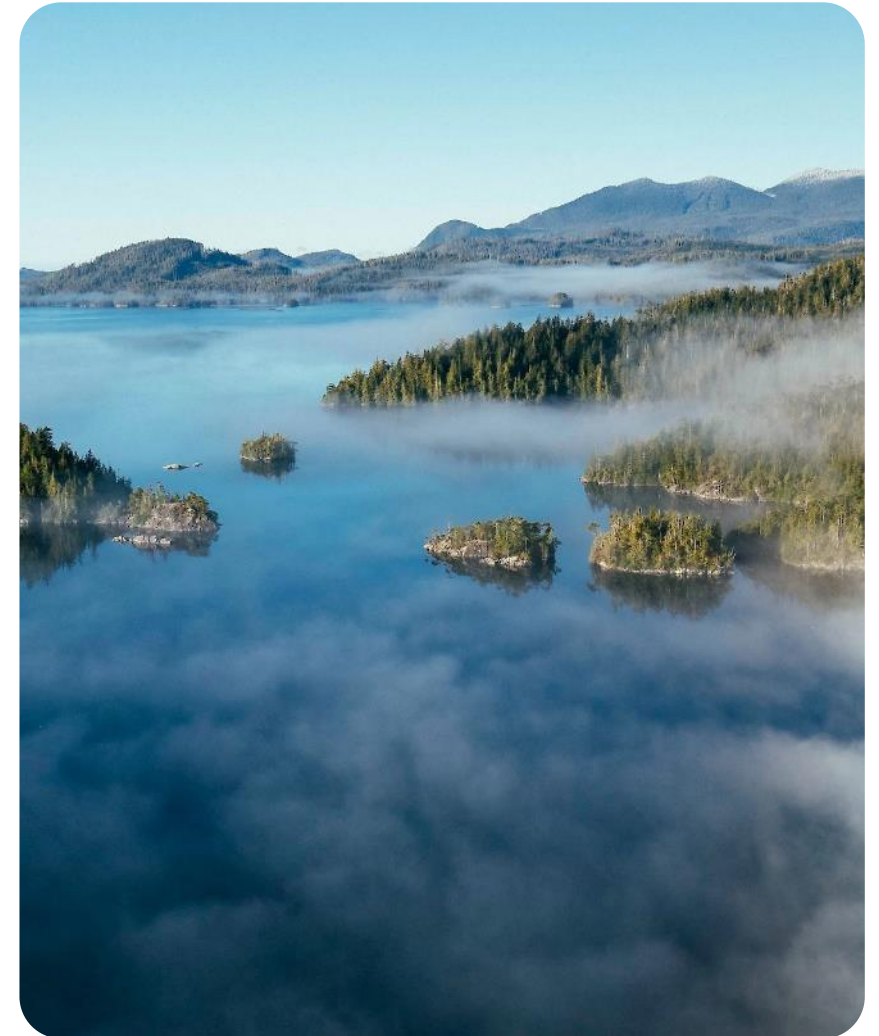
Table of Contents

1.	Introduction	3
2.	Key Findings	6
3.	Detailed Findings	13
	Awareness & Familiarity	14
	Past & Future Travel	17
	Perceptions of Tofino	22
	Motivations, Barriers, & Desired Activities	30
4.	Respondent Profile	42
5.	Value Add: Canadian Traveller Survey	44



1

Introduction



Background and Objectives

Background

Tourism Tofino was interested in better understanding BC travellers' awareness, perceptions, and preferences with the goal of increasing travel to Tofino during the non-peak season.

These research results will provide valuable insights into enhancing Tourism Tofino's offering.

Objectives

- Measure 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 1,612 BC 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

May 9 to 16, 2024



Margin of Error & Weighting

For comparison purposes, a probability sample of 1,612 BC travellers yields a margin of error no greater than $\pm 2.4\%$, 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 travellers.



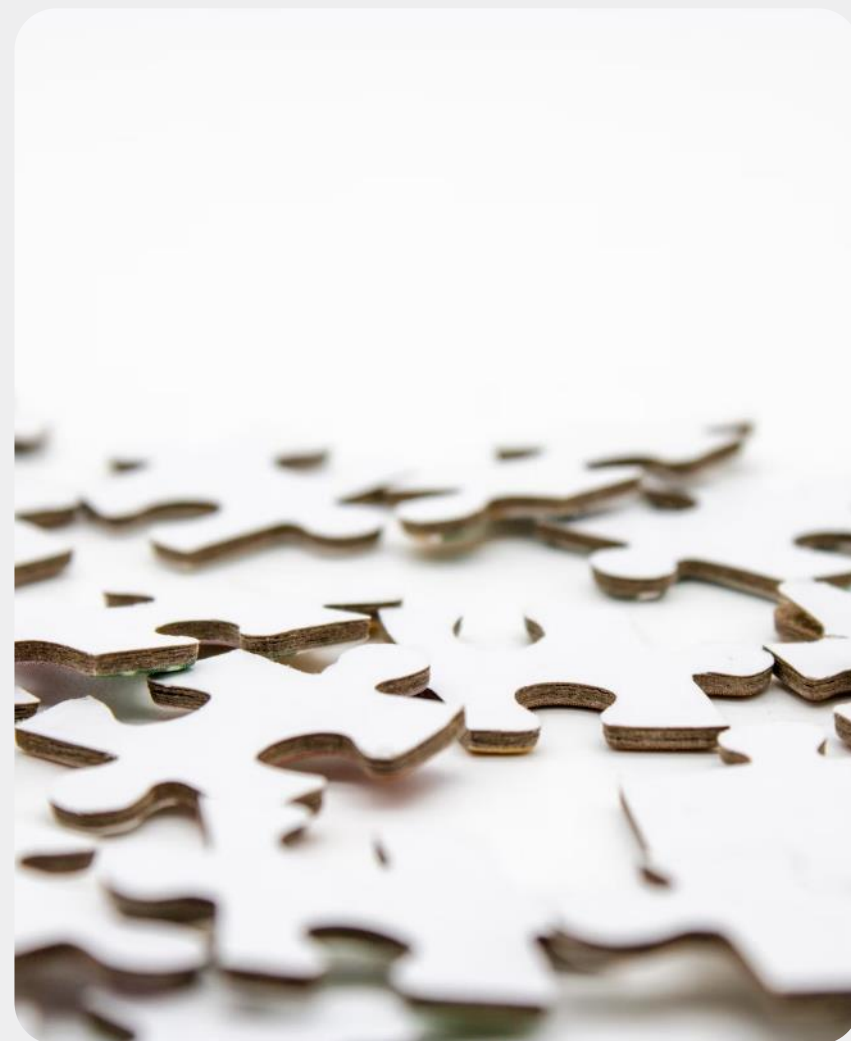
Significant Differences

Significant differences between sample subgroups are marked as follows:

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

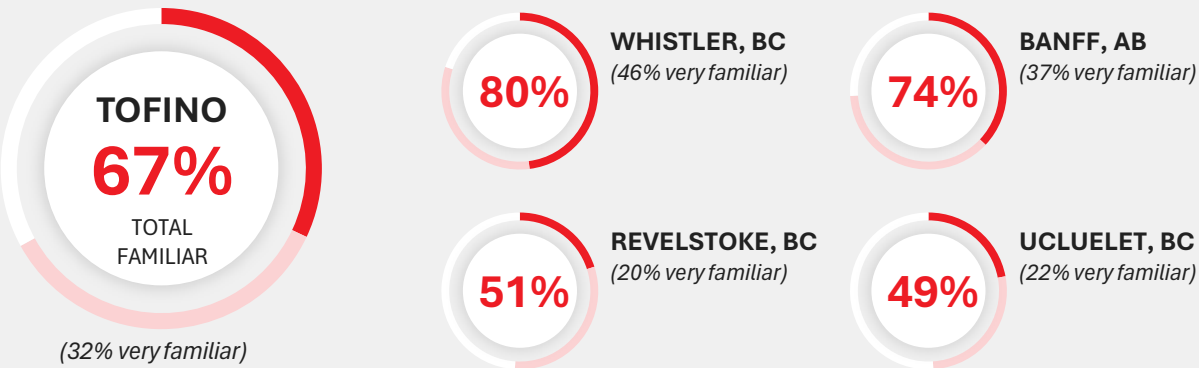
2

Key Findings

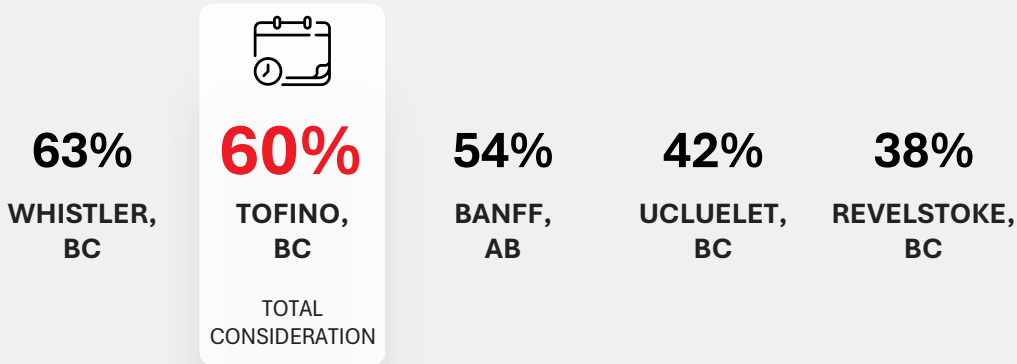


Key Findings: Awareness, Familiarity, and Future Visitation

Tofino ranks behind Whistler and Banff for familiarity but ahead of Ucluelet and Revelstoke.

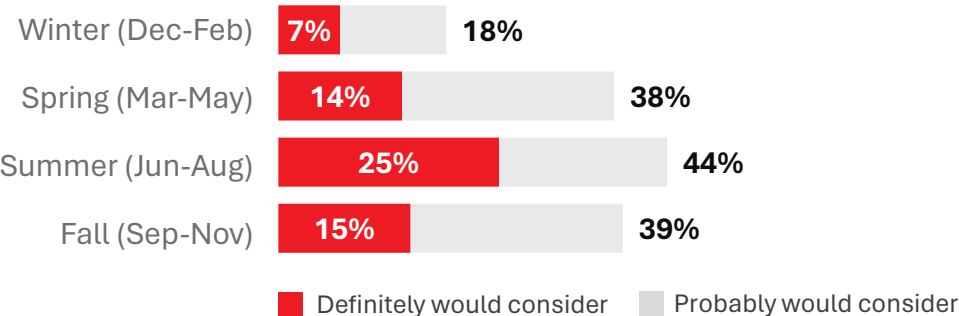


Although less familiar with Tofino than Whistler and Banff, there is strong interest in travelling to Tofino in the next 5 years.



As anticipated, travellers are more likely to consider visiting Tofino in the summer months, but overall consideration for travel to Tofino in the fall and spring is not far behind. This indicates a significant opportunity to market these shoulder seasons more effectively and boost visitation.

Seasonal Visitation Consideration

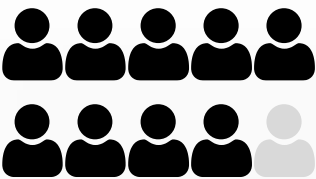


RECOMMENDATIONS:

- Develop **targeted marketing campaigns** that highlight the unique experiences and advantages of visiting Tofino in the non-peak season (e.g., lower costs, less crowding, seasonal activities like storm watching).
- Work with tourism partners to create special packages and discounts to **incentivize travellers** to choose these shoulder seasons.
- **Collaborate with travel influencers and writers** to share personal stories and experiences of off-peak travel to Tofino, showcasing the unique charm and tranquility of the area during the winter, spring and fall.

Key Findings: Overall Perceptions of Tofino and Key Strengths

BC travellers have a very favourable overall perception of Tofino, with the highest scores among its key competitors – on par with Banff, AB.



93%
TOTAL FAVOURABLE
opinion of **Tofino**
(51% very favourable)

Total Favourable		Very Favourable
92%	Banff, AB	49%
91%	Ucluelet, BC	42%
85%	Whistler, BC	43%
85%	Revelstoke, BC	25%

Tofino performs strongly in the areas that are most important to visitors.

Tofino’s **key strengths** that Tourism Tofino should continue to excel in to ensure sustained visitor satisfaction and repeat visitation are:



Being authentic



Offers rest and relaxation



Protects and cherishes its unique natural surroundings



Provides a variety of outdoor activities



Makes visitors feel connected to nature



RECOMMENDATIONS:

- Consistent positive experiences can lead to repeat visits and strong word-of-mouth recommendations.
- Since Tofino already excels at being authentic and making visitors feel connected to nature, marketing efforts should prominently feature these aspects. Use real visitor storytelling, high-quality imagery, and engaging content that highlight these experiences.
- Develop interactive and immersive activities that deepen visitors' connection to nature and local culture.
- Continue to invest in the preservation and enhancement of Tofino’s natural surroundings and cultural authenticity, which not only protects these resources but also appeals to environmentally conscious travellers.

Key Findings: Latent Strengths and Weaknesses

Environmental sustainability is the one area where Tofino is performing well on, but travellers do not currently find crucial (latent strength).



Increasing awareness and appreciation for Tofino's sustainability efforts can shift traveller perceptions, making environmental sustainability a more valued aspect of the travel experience.



RECOMMENDATIONS:

- Enhance marketing efforts to raise awareness about Tofino's strong environmental sustainability practices.
- Educate travellers on the importance and benefits of sustainable tourism and how Tofino's efforts contribute to preserving its natural beauty.

There are no critical areas for improvement (key weaknesses), indicating that Tofino is excelling in the right aspects. However, there are several lower priority areas that Tofino does not perform as strongly on (latent weaknesses), which presents potential opportunities for Tourism Tofino.

Although these are currently perceived as low priority overall, they are more **niche**, and enhancing them can **diversify** Tofino's appeal and attract new types of visitors:

- Acclaimed food scene
- Year-round activities
- Vibrant arts and culture community
- Opportunities to learn about Indigenous culture and history
- Opportunities to learn something new



RECOMMENDATIONS:

- Align prioritization of these aspects with Tofino's long-term strategic goals. Ensure these improvements contribute to sustainable tourism growth and align with Tofino's brand values.
- Some areas could be developed or repositioned to become more relevant, perhaps by integrating them into the broader experience (e.g., art displays in natural settings, cultural tours combined with outdoor activities).
- While acclaimed food scene is currently viewed as less important, linking it more explicitly to Tofino's authentic and natural image could enhance its appeal (e.g., promoting farm-to-table dining experiences or food tours that highlight local ingredients). Consider collaborating with local chefs, restaurants, etc. to elevate Tofino's culinary offerings.
- Partner with Indigenous communities to develop authentic cultural experiences (e.g., guided tours, workshops, storytelling sessions).

Key Findings: Motivators & Barriers and Desired Activities

63%

Natural Beauty

Similar to Tofino’s key strengths, the top two motivators for visiting Tofino are its **natural beauty** and **ocean and forest experiences**.

45%

Ocean and Forest experiences



RECOMMENDATIONS:

- Develop strategies that improve affordability and accommodation availability (e.g., promote off-peak travel to mitigate crowding, explore partnerships with local businesses to offer competitive packages during the shoulder seasons).
- Promote local events, festivals, and seasonal activities that can attract visitors during the non-peak season.
- Promote the various transportation options available for travel to and within Tofino.

The **main barriers to visiting Tofino** centre around affordability, accommodation availability, ease of access, and crowding.

81%

Affordability/
cost of travel

75%

Finding
accommodation

73%

Too far/
hard to get to

66%

Too busy/
crowded

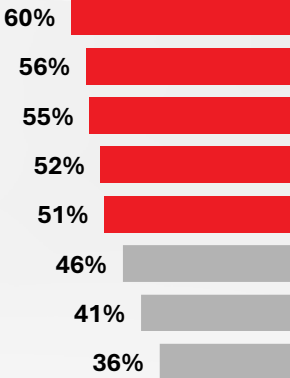
66%

Needing ferry
to get there

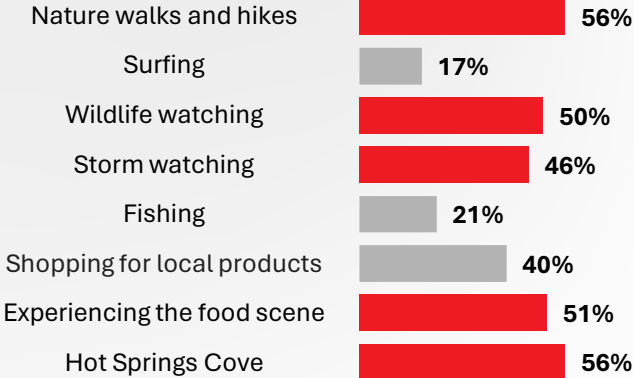
Results on awareness and interest of Tofino activities/ attractions reveal opportunities related to **Tofino’s food scene** and **Hot Springs Cove**.

- Nature walks, wildlife watching, and storm watching in Tofino have relatively strong awareness and interest.
- Although Tofino is well known for surfing and fishing, these are of lower interest overall, which suggests the importance of promoting Tofino’s wide range of activities to attract more visitors.
- Additionally, there is notable interest in Hot Springs Cove and the local food scene, but awareness is currently low. By enhancing visibility of these attractions through targeted marketing and travel influencer collaborations, Tofino can draw a larger and more varied audience.

Awareness



Interest



Key Findings: Unlocking Tofino's Potential Among Younger Travellers and Families

Younger travellers (18-34) and families show strong potential for increased visits to Tofino, especially during the off-peak seasons.

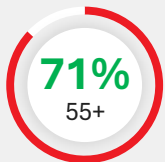
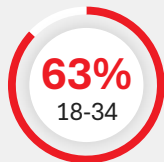


- Compared to non-visitors, past 5-year Tofino visitors are more likely to be younger and have children under 18 at home.
- Within the next 5 years, younger travellers and those with children are more likely to consider visiting Tofino in all/ most seasons.

	18-34	35-54	55+	With Children	Without Children
Winter	30%	18%	12%	27%	16%
Spring	45%	39%	32%	45%	36%
Summer	60%	43%	35%	52%	42%
Fall	45%	36%	37%	43%	37%

However, younger travellers are less familiar with Tofino.

TOTAL FAMILIAR



Younger travellers as well as those with children also have less favourable perceptions of Tofino, potentially due to lack of familiarity with the destination.

Favourable 😊

87%

18-34

93%

35-54

96%

55+



88%

With children



94%

Without children

- Younger travellers and those with children show greater interest in outdoor activities: sauna/cold plunges, sea kayaking, stand-up paddleboarding, and surfing.
- Younger travellers are also more likely to be motivated to visit Tofino for its wildlife and outdoor activities.
- However, both groups are more likely to cite a lack of activities and attractions as a barrier to visiting Tofino. As well, those with children are less likely to agree that Tofino offers a variety of outdoor activities, protects its unique natural surroundings, and provides rest and relaxation.
- Younger travellers are also more likely to cite most factors as barriers, including accessibility issues, preference for warm weather destinations, unfamiliarity with the area, safety concerns, environmental concerns, and cultural concerns.



Not enough activities/ attractions



49%
among
18-34

47%
among those
with children

Key Findings: Recommendations for Targeting Younger Travellers and Families

Recommendations:

- 1 **Increase familiarity and positive perception among younger travellers:**
 - 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.
 - Collaborate with influencers and travel bloggers who appeal to younger demographics to promote Tofino's attractions, with a focus on outdoor activities and wildlife.
- 2 **Enhance appeal to families:**
 - Highlight and expand family-friendly activities and attractions. Emphasize educational and interactive experiences that appeal to children and their parents.
 - Promote Tofino as a year-round destination with special packages and activities suitable for families.
- 3 **Enhance/promote variety of activities:**
 - Continue to promote outdoor/adventure activities, ensuring that there are ample opportunities and facilities for these activities (e.g., guided nature walks, interactive wildlife experiences, cultural workshops).
- 4 **Ensure communications related to off-peak travel promotions are targeted towards younger travellers.**



3

Detailed Findings

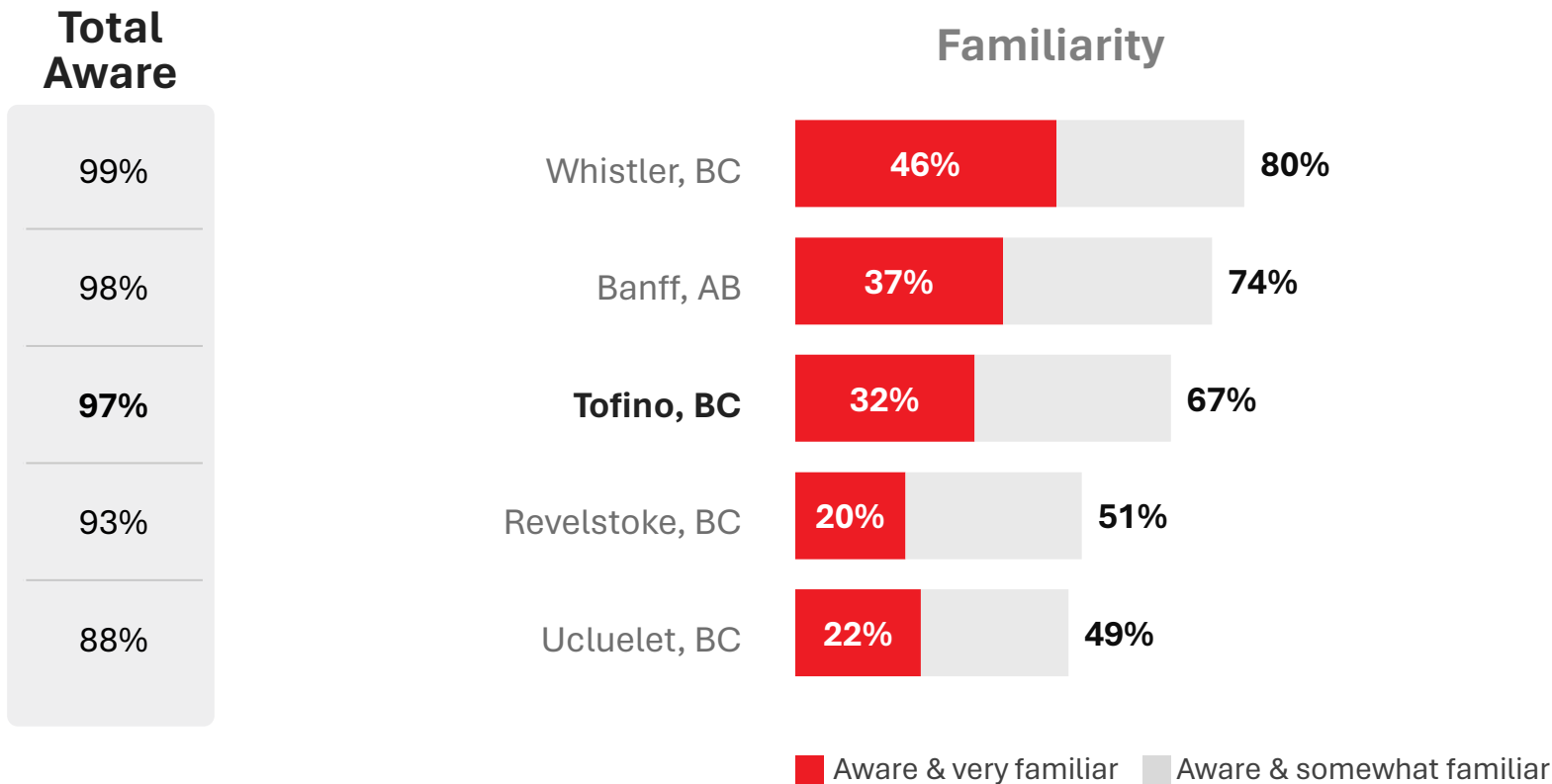




Awareness & Familiarity

Familiarity with Travel Destinations

Almost all BC travellers are aware of Tofino, which ranks alongside Whistler and Banff. Tofino lands in the middle of its key competitors (behind Whistler and Banff and ahead of Revelstoke and Ucluelet), with two-thirds who are familiar with Tofino as a travel destination. Close to one-third say they are “very familiar” with Tofino.



A1. How aware and familiar are you with each of the following travel destinations?
Base: All respondents (n=1,612)

Familiarity with Travel Destinations – By Demographics

Not surprisingly, BC travellers are more likely to be familiar with the travel destinations closest to where they live, with residents of Vancouver Island/Coast being significantly more likely to be familiar with both Tofino and Ucluelet. Younger travellers are less likely to be familiar with all travel destinations, except Whistler, which has consistent levels of familiarity regardless of age.

Familiarity (Very/Somewhat)

Destination	Total	Age			Region			
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC
n=	1,612	346	494	772	964	320	170	158
Whistler, BC	80%	83%	80%	78%	88%	73%	68%	61%
Banff, AB	74%	69%	72%	79%	74%	81%	68%	73%
Tofino, BC	67%	63%	65%	71%	65%	61%	83%	51%
Revelstoke, BC	51%	48%	48%	56%	43%	75%	46%	49%
Ucluelet, BC	49%	37%	45%	59%	46%	44%	67%	36%

A1. How aware and familiar are you with each of the following travel destinations?
Base: All respondents (n=1,612)

Significantly higher than comparison group(s)

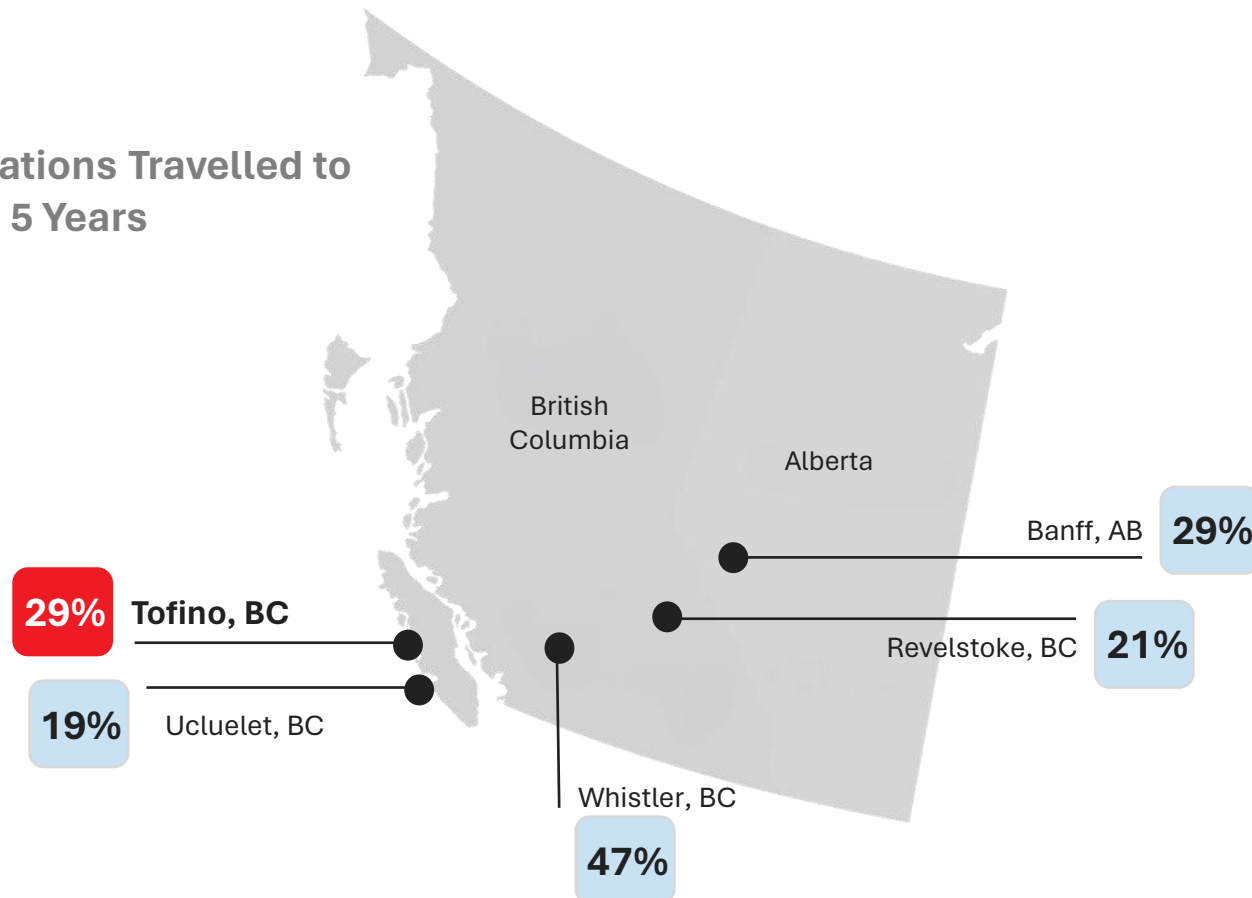


Past & Future Travel

Past Visitation

Close to 3-in-10 BC travellers have visited Tofino in the past 5 years. This is comparable to Banff but significantly lower than Whistler and higher than Revelstoke and Ucluelet.

Destinations Travelled to in Past 5 Years

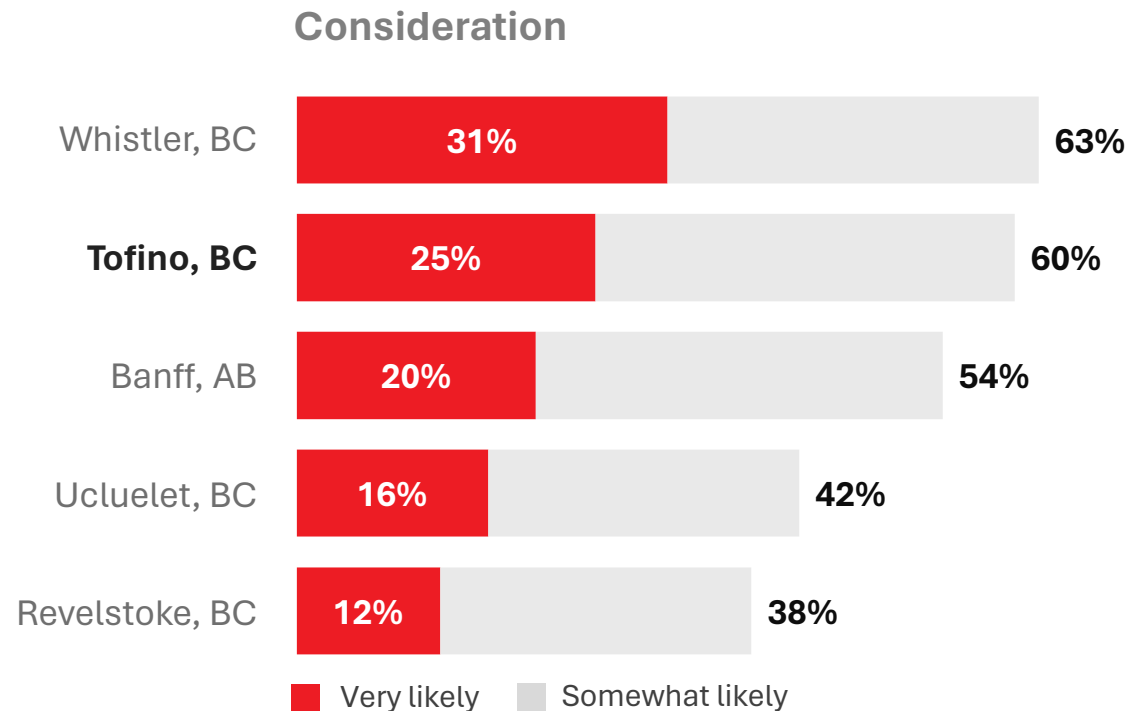


Those **more likely** to have travelled to Tofino in the **past 5 years** include:

- **Vancouver Island/Coast residents**
(52% vs. 26% Metro Vancouver, 19% Interior BC and 17% Other BC)
- Those **with children**
(37% vs. 27% no children)
- Those with **higher incomes**
(35% \$75K+ vs. 23% <\$75K)

Future Visitation to Tofino

While the overall likelihood of visiting Tofino in the next five years is similar to Whistler, more BC residents are certain about visiting Whistler (31%) than Tofino (25%).

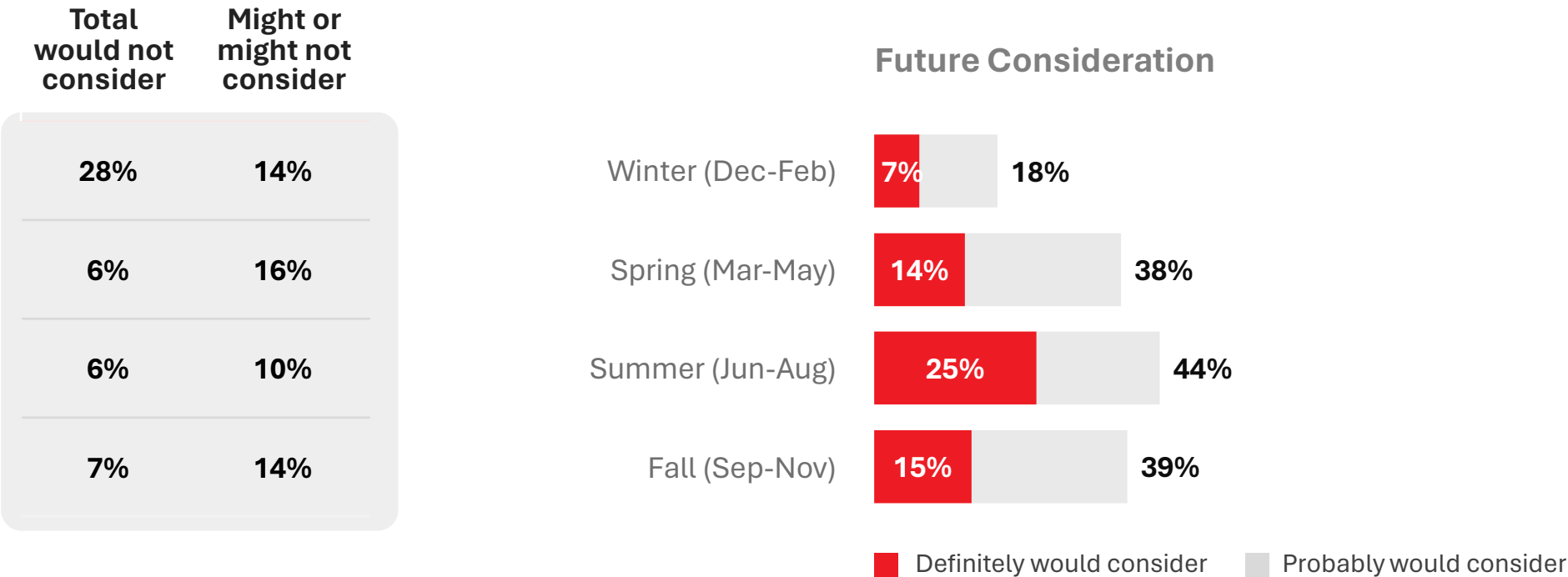


Those **more likely** to travel to Tofino in the **next 5 years** include:

- Younger **18-34-year-olds** (72% vs. 56% 35+)
- Those **with children** (68% vs. 58% no children)
- **Vancouver Island/Coast** (79%) and **Metro Vancouver** (61%) residents (vs. 47% Interior BC and 41% Other BC)
- Those with **higher incomes** (67% \$75K+ vs. 53% <\$75K)

Likelihood to Consider Visiting Tofino During Different Seasons

Unsurprisingly, travellers are more likely to consider travelling to Tofino in the summer months, with more than 2-in-5 definitely or probably considering a trip. Overall consideration for travel to Tofino in fall and spring is not far behind, with close to 2-in-5 for each season. This indicates a significant opportunity to market these shoulder seasons more effectively and boost visitation. Winter, however, will be the most challenging, with less than 2-in-10 considering a visit during the winter months.



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=1,612)

Likelihood to Consider Visiting Tofino – By Demographics

Younger travellers aged 18-34 and Vancouver Island/Coast residents are significantly more likely to consider visiting Tofino during all seasons. Those with children show a higher propensity to visit during the summer, spring, and winter.

Consideration (Definitely/Probably)

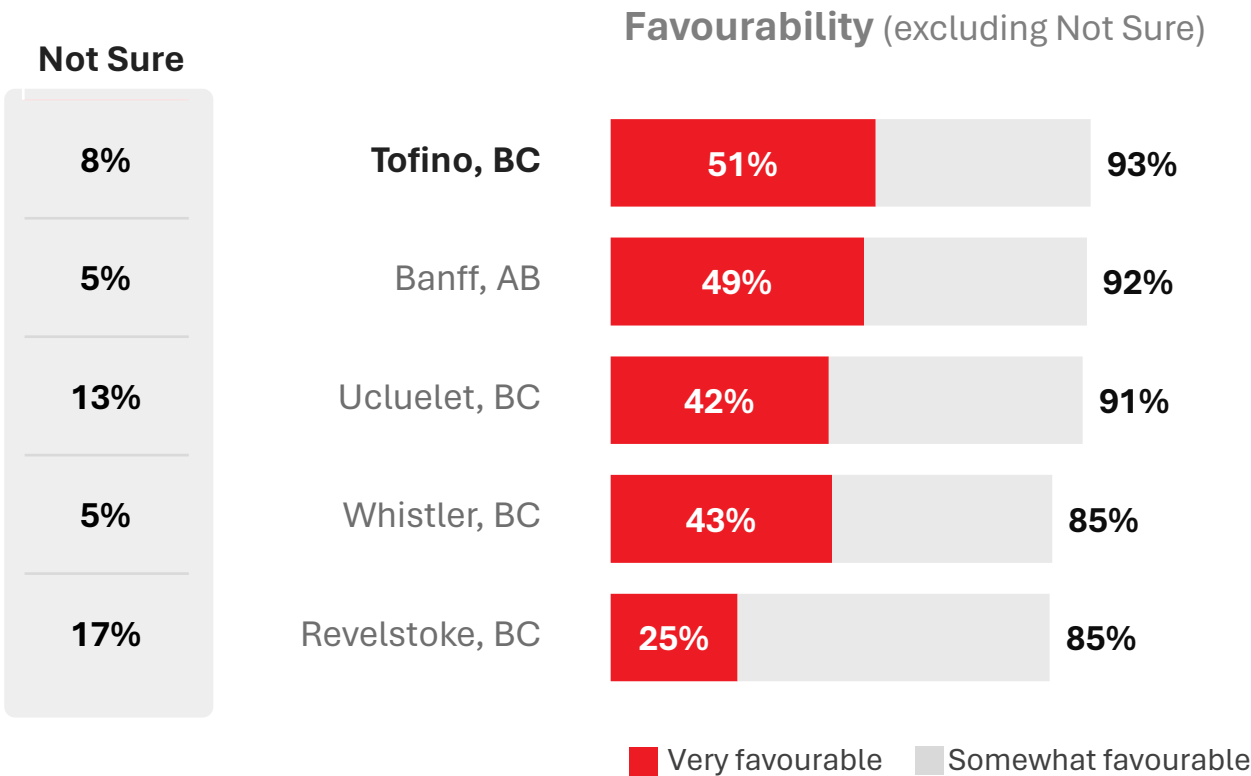
Seasons	Total	Age			Region				Children <18 in Household	
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC	With Children	Without Children
n=	1,612	346	494	772	964	320	170	158	329	1283
Winter (Dec-Feb)	18%	30%	18%	12%	18%	13%	26%	14%	27%	16%
Spring (Mar-May)	38%	45%	39%	32%	39%	26%	54%	22%	45%	36%
Summer (Jun-Aug)	44%	60%	43%	35%	47%	31%	51%	33%	52%	42%
Fall (Sep-Nov)	39%	45%	36%	37%	38%	28%	56%	29%	43%	37%



Perceptions of Tofino

Overall Opinion of Travel Destinations

BC travellers have a very positive overall opinion of Tofino, with the highest scores among its key competitors – on par with Banff, AB. Compared to their younger counterparts, older travellers have more positive perceptions of Tofino, while younger travellers view Whistler more favourably. Additionally, overall perception of Tofino is more positive among travellers without children.



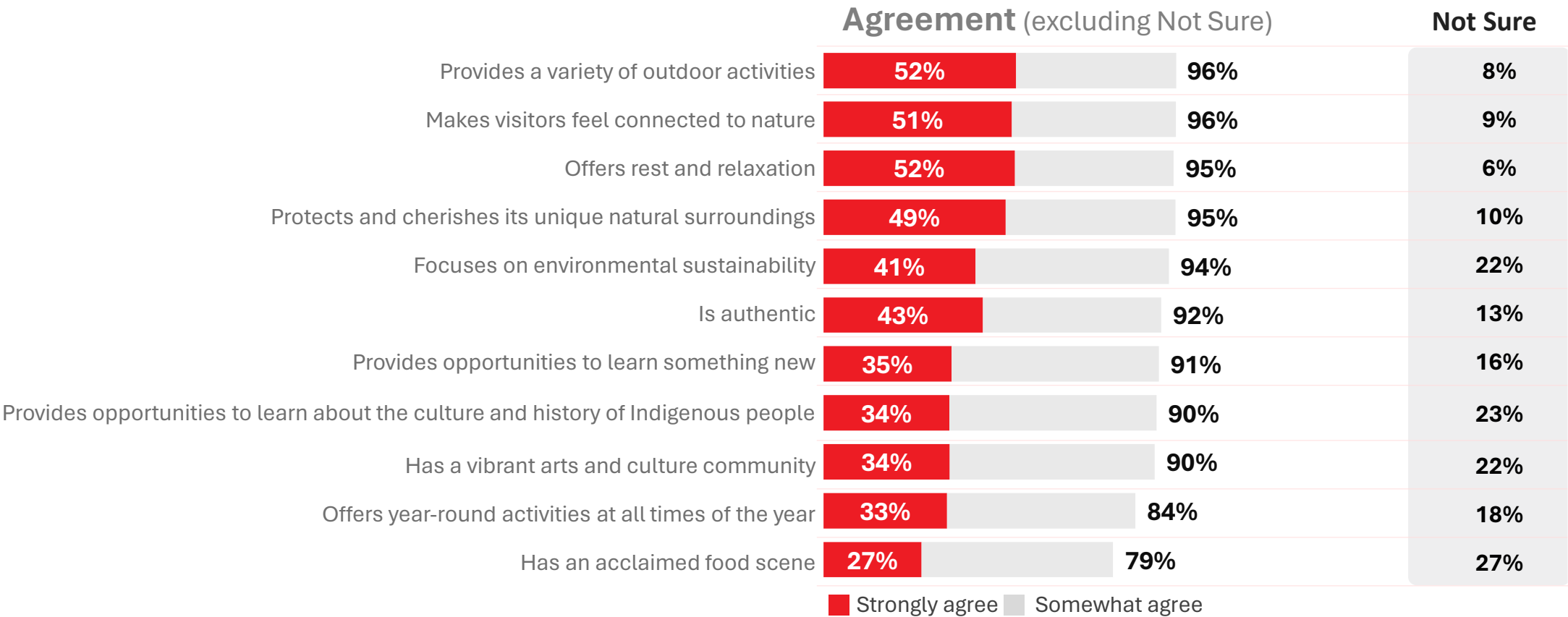
Age			Children <18 in Household	
18-34	35-54	55+	With Children	Without Children
87%	93%	96%	88%	94%
91%	93%	93%	88%	94%
82%	90%	96%	84%	93%
89%	84%	84%	89%	84%
79%	84%	89%	84%	85%

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

Significantly higher than comparison group(s)

Perceptions of Tofino

BC travellers with at least some familiarity with Tofino have very positive brand perceptions of Tofino. Travellers award the highest “strongly agree” scores (around half of BC travellers) for provides a variety of outdoor activities, offers rest and relaxation, makes visitors feel connected to nature, and protects and cherishes its unique natural surroundings. However, a notable proportion of travellers are unable to rate Tofino on having an acclaimed food scene, providing opportunities to learn about the culture and history of Indigenous people, focusing on environmental sustainability, and having a vibrant arts community. Tourism Tofino should consider greater communication and promotion of these offerings.



C2. Now we'd like you to think specifically about Tofino, BC. Based on what you know or have heard, how much do you agree or disagree that Tofino...
Base: Some familiarity with Tofino. Chart shows results excluding not sure (base varies)

Perceptions of Tofino – By Demographics

Overall, perceptions of Tofino are generally favourable, regardless of gender, age or children in the household. However, women are more likely to agree with almost all Tofino brand statements, while younger travellers (18-34) award lower ratings for most measures. Those with children at home are less likely to agree that Tofino offers a variety of outdoor activities, protects/cherishes unique natural surroundings, and offers rest and relaxation.

Agreement (Strongly/Somewhat)

Statements	Total	Gender		Age			Children <18 in Household	
		Male	Female	18 - 34	35 - 54	55+	Children	No Children
n=	1,405	625	774	289	427	689	287	1,118
Provides a variety of outdoor activities	96%	93%	98%	91%	97%	97%	92%	97%
Makes visitors feel connected to nature	96%	94%	97%	90%	97%	98%	93%	96%
Protects and cherishes unique natural surroundings	95%	93%	97%	91%	97%	97%	92%	96%
Offers rest and relaxation	95%	91%	98%	89%	96%	97%	90%	96%
Focuses on environmental sustainability	94%	92%	96%	88%	95%	96%	91%	95%
Is authentic	92%	89%	94%	89%	92%	93%	91%	92%
Provides opportunities to learn something new	91%	87%	94%	85%	91%	94%	90%	91%
Provides opportunities to learn about the culture and history of Indigenous people	90%	89%	91%	85%	90%	94%	87%	91%
Has a vibrant arts and culture community	90%	86%	93%	88%	89%	91%	91%	89%
Offers year-round activities at all times of the year	84%	82%	87%	80%	82%	89%	84%	85%
Has an acclaimed food scene	79%	72%	86%	76%	73%	84%	76%	79%

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.

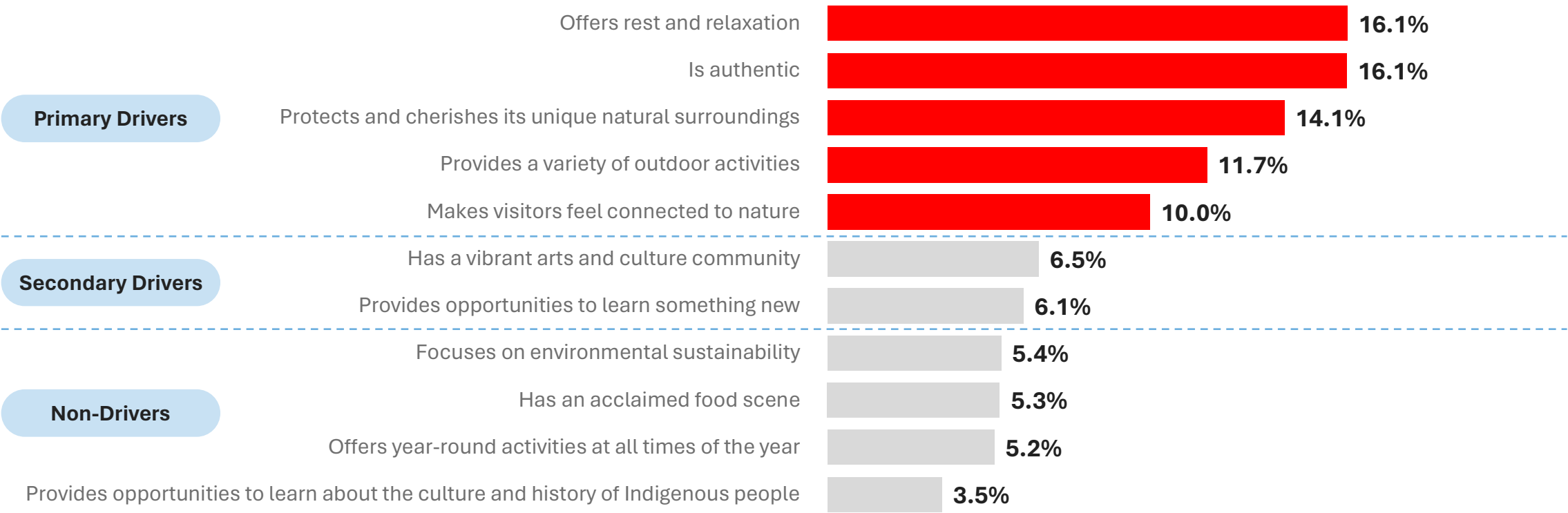
- The higher the %, the stronger that attribute is as a driver.
- The numbers are also proportionate. For example, a driver with 20% importance is twice as important as one with 10% importance.



Key Drivers of Overall Opinion of Tofino

The top three drivers driving overall perception of Tofino as a travel destination are offers rest and relaxation, is authentic, and protects and cherishes its unique natural surroundings. Additionally, variety of outdoor activities and ability to foster a connection with nature are also significant factors that enhance Tofino’s appeal. Provides opportunities to learn about the culture and history of Indigenous people is the least influential driver.

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 excels in several key areas that are highly important to BC travellers: authenticity, rest and relaxation, preservation of its unique natural surroundings, diverse outdoor activities, and deep connection to nature. Maintaining strong performance in these areas ensures sustained visitor satisfaction and fosters repeat visits and word-of-mouth recommendations. Tourism Tofino should emphasize these strengths in marketing campaigns and continue to invest in the preservation and enhancement of Tofino's natural surroundings and cultural authenticity.

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

These are no factors that emerge as critical improvement areas, which shows that Tofino is performing well on the areas that matter most.

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

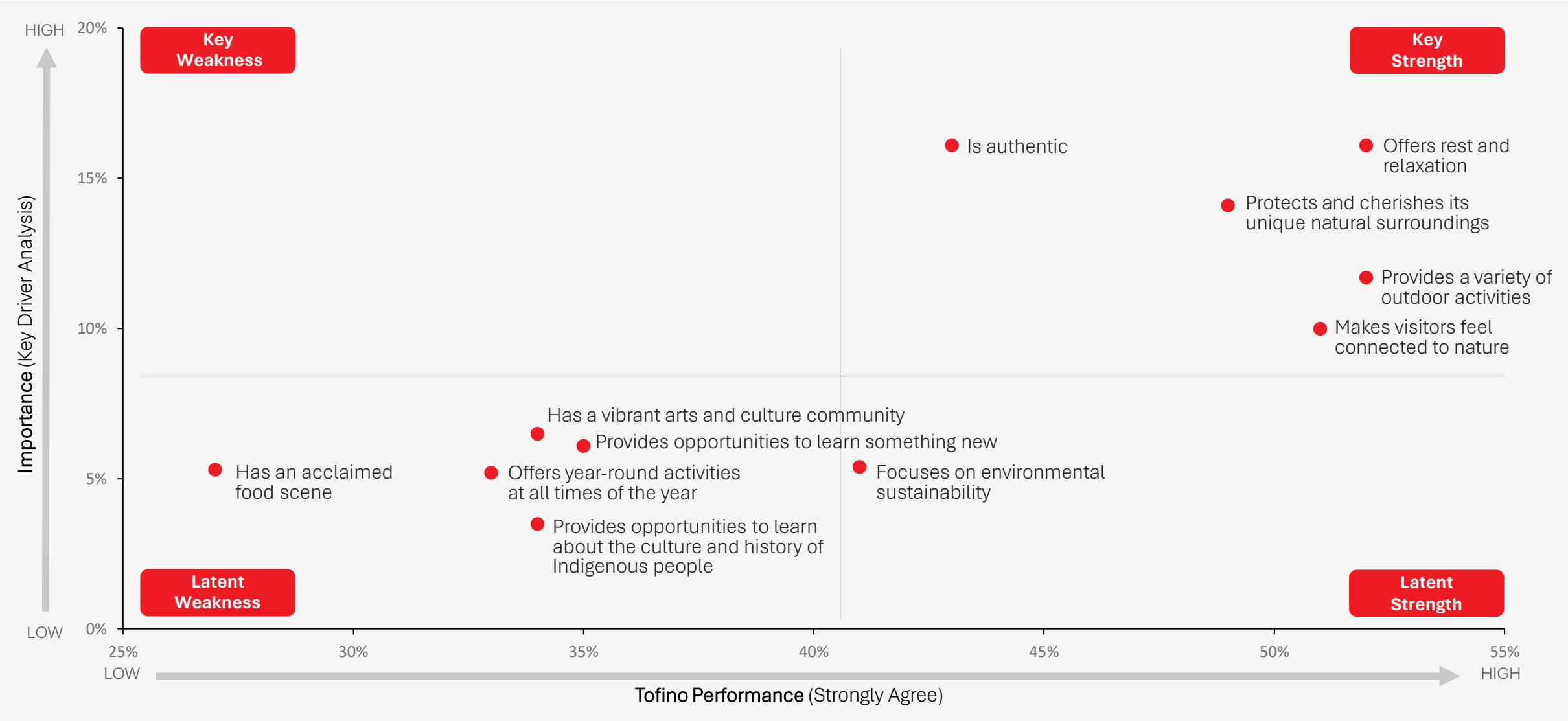
Environmental sustainability is the one area where Tofino is performing well on, but travellers do not currently find crucial. Increasing awareness of Tofino's sustainability efforts can shift traveller perceptions, making sustainability a more valued aspect of their travel experience.

Educate travellers on the benefits of sustainable tourism and Tofino's role in preserving natural beauty. This can attract eco-conscious travellers and differentiate Tofino as a responsible and forward-thinking destination.

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

The low-priority areas that Tofino does not perform strongly on are acclaimed food scene, year-round activities, vibrant arts and culture community, opportunities to learn about the culture and history of Indigenous people, and opportunities to learn something new. Though currently lower priority, enhancing these niche aspects can attract new travellers. For example, partner with Indigenous communities to develop authentic cultural experiences. Some aspects could be developed or repositioned to become more relevant by integrating them into the broader experience, such as including art displays in natural settings or providing cultural tours combined with outdoor activities. It will be important for Tourism Tofino to ensure that these improvements align with long-term goals and promote sustainable tourism.

Tourism Tofino Opportunity Grid

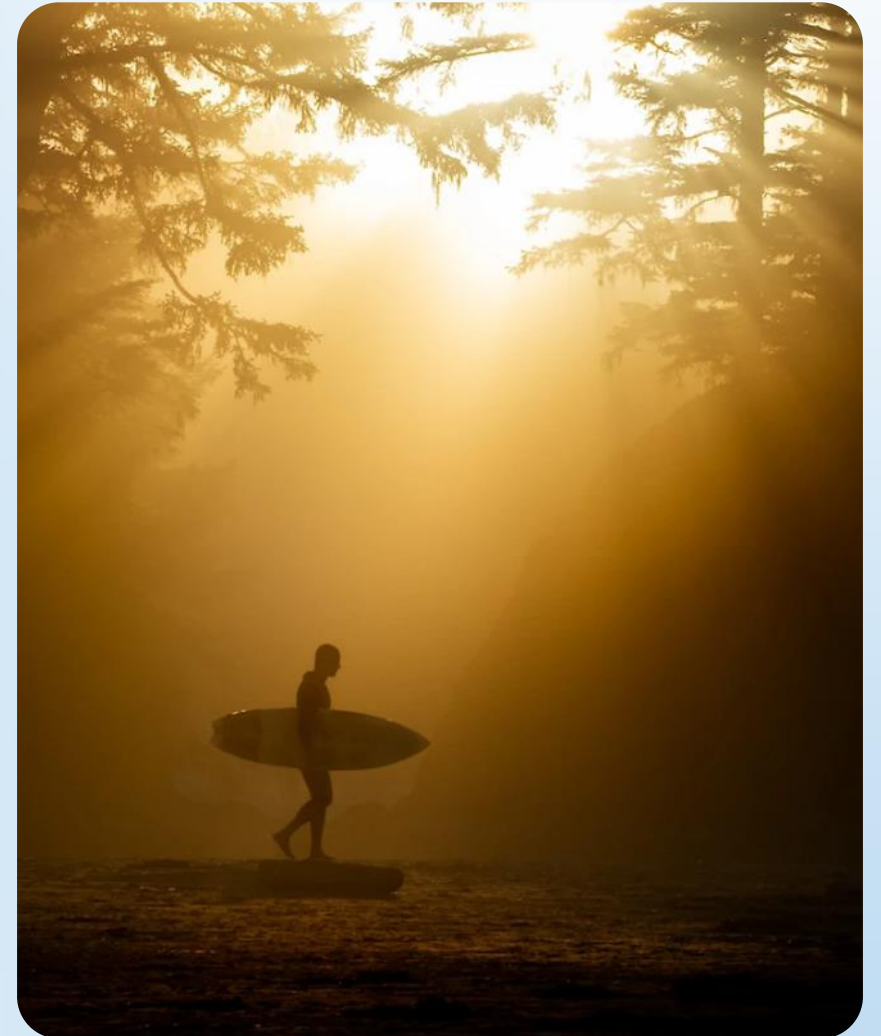




Motivations, Barriers, & Desired Activities

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

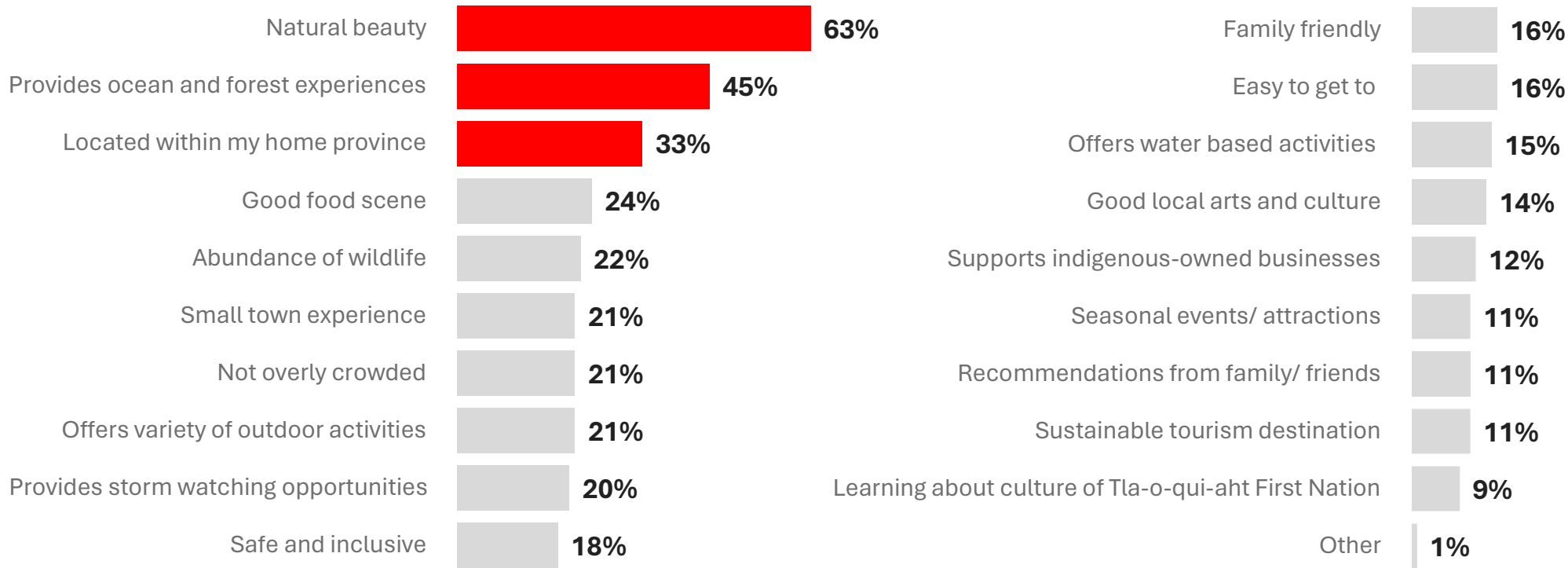
“Tofino is a destination that connects the raw beauty of the ocean and forest. Situated within the traditional territory of the Tla-o-qui-aht First Nation, Tofino is surrounded by the breathtaking expanse of the UNESCO Clayoquot Sound Biosphere Region – cherished for its profound biodiversity. Tofino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



Top Motivations for Travelling to Tofino

The #1 motivator for visiting Tofino is clearly its natural beauty, with over 3-in-5 BC travellers selecting this factor. This is followed by ocean and forest experiences and being located within their home province. While Indigenous-focused activities and sustainable tourism are important to Tourism Tofino, travellers do not list them as top motivators for travel.

Motivating Factors



D1. Which of the following factors are most motivating for you personally when considering travelling to Tofino?
Base: All respondents (n=1,612)

Motivations for Travelling to Tofino – By Demographics

Natural beauty and ocean and forest experiences are the primary motivators across all demographics, especially older travellers. Compared to their older counterparts, younger travellers (18-34) are more motivated by Tofino’s wildlife and outdoor activities. Those likely to travel to Tofino in the next 5 years are more likely to be attracted to Tofino’s ocean and forest experiences, food scene, outdoor activities, and storm watching opportunities.

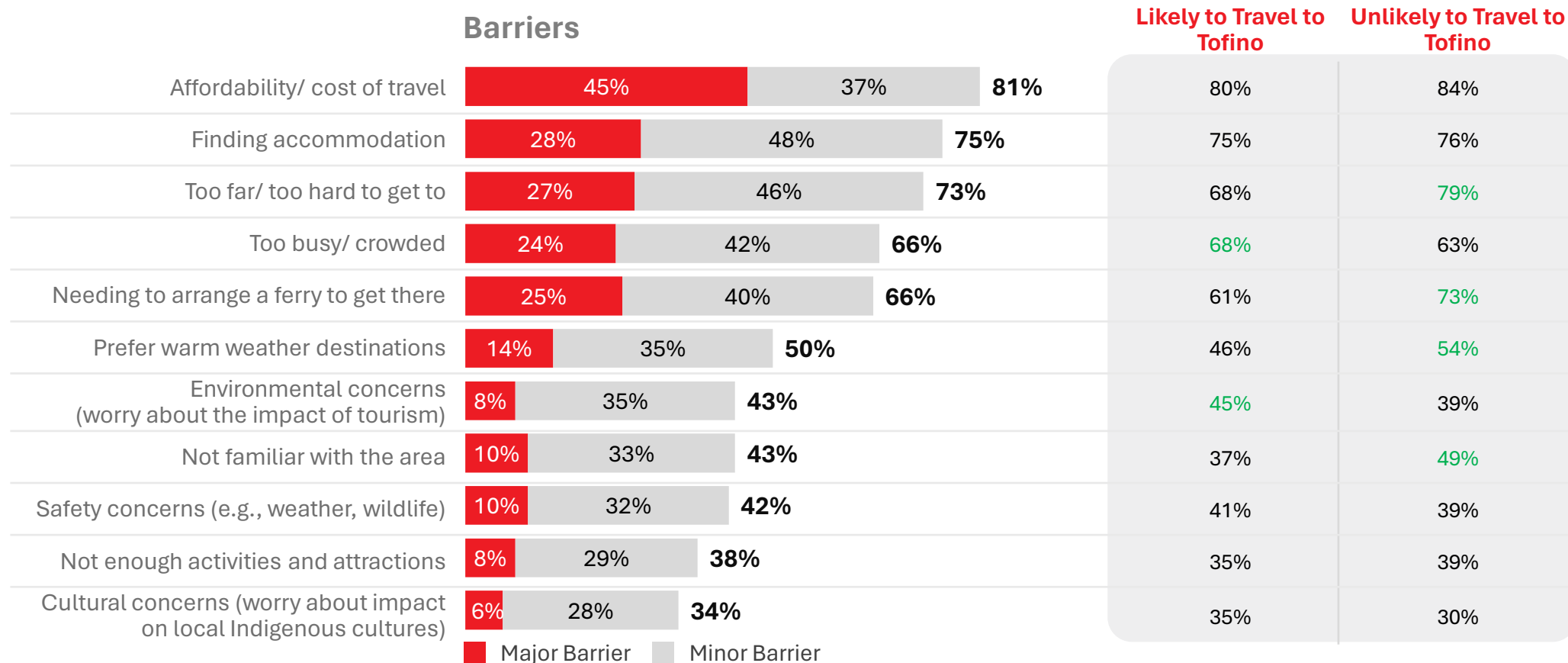
Motivating Factors	Total	Age			Region				Likelihood to Visit Tofino in Next 5 Years	
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC	Likely to Travel to Tofino	Unlikely to Travel to Tofino
n=	1,612	346	494	772	964	320	170	158	914	649
Natural beauty	63%	54%	61%	69%	62%	66%	61%	61%	64%	62%
Provides ocean and forest experiences	45%	37%	43%	50%	41%	46%	51%	50%	49%	39%
Located within my home province	33%	25%	25%	43%	32%	32%	36%	29%	34%	32%
Good food scene	24%	24%	24%	24%	26%	22%	21%	19%	26%	21%
Abundance of wildlife	22%	27%	20%	21%	19%	26%	25%	30%	23%	21%
Small town experience	21%	22%	23%	20%	23%	21%	16%	26%	20%	24%
Not overly crowded	21%	15%	25%	22%	24%	21%	14%	21%	19%	24%
Offers variety of outdoor activities	21%	27%	19%	18%	21%	22%	19%	22%	24%	17%
Storm watching opportunities	20%	12%	19%	27%	17%	17%	34%	17%	24%	16%
Safe and inclusive	18%	20%	16%	18%	20%	12%	17%	17%	19%	16%

Motivations for Travelling to Tofino – By Demographics *Continued*

Motivating Factors	Total	Age			Region				Likelihood to Visit Tofino in Next 5 Years	
		18-34	35-54	55+	Metro Vancouver	Interior BC	Vancouver Isl./Coast	Other BC	Likely to Travel to Tofino	Unlikely to Travel to Tofino
n=	1,612	346	494	772	964	320	170	158	914	649
Family friendly	16%	20%	22%	9%	18%	16%	10%	17%	17%	15%
Easy to get to	16%	18%	16%	15%	16%	13%	22%	8%	16%	14%
Offer water-based activities	15%	20%	17%	11%	15%	17%	12%	17%	18%	12%
Good local arts and culture	14%	14%	11%	16%	13%	12%	18%	15%	14%	12%
Supports indigenous businesses	12%	11%	10%	14%	11%	14%	13%	13%	12%	12%
Seasonal events/ attractions	11%	16%	11%	9%	12%	11%	9%	12%	12%	10%
Recommendations from friends/ family	11%	15%	11%	9%	12%	11%	9%	8%	12%	9%
Sustainable tourism	11%	13%	8%	11%	12%	9%	11%	8%	13%	7%
Learning about culture of Tla-o-qui-aht First Nation	9%	9%	9%	10%	8%	11%	11%	12%	10%	9%

Barriers to Visiting Tofino

Over 8-in-10 travellers cite affordability/ cost of travelling to Tofino as the main barrier to visiting Tofino, with over 4-in-10 finding it a major barrier. About three-quarters of BC travellers also struggle with accommodation availability and distance/ effort required to get to Tofino. For those unlikely to visit Tofino in the next 5 years, difficulty accessing Tofino, preference for warm destinations, and unfamiliarity with the area are greater barriers.



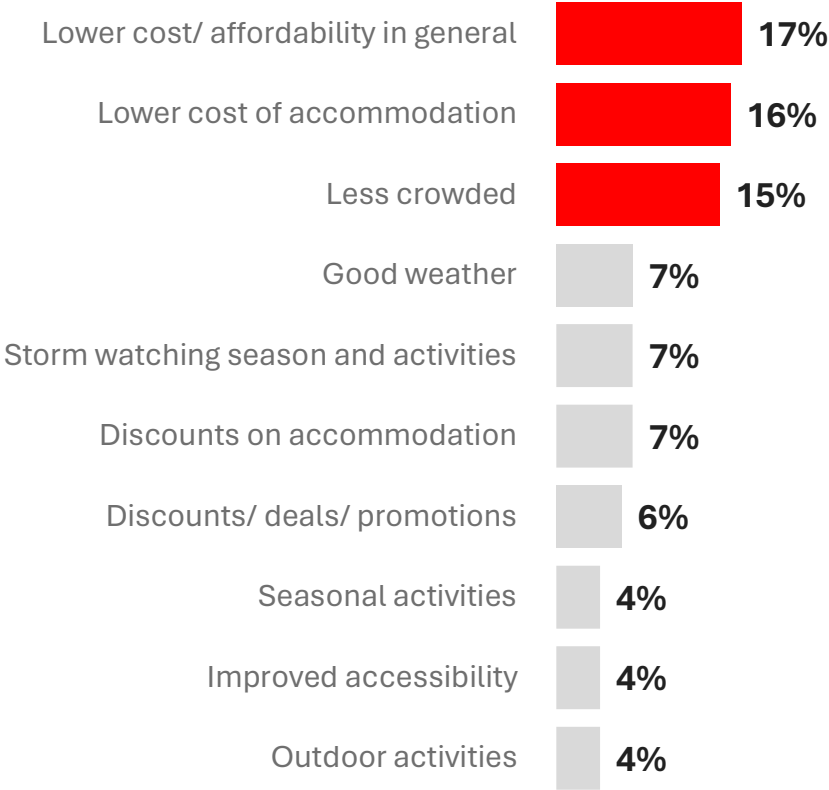
Barriers to Visiting Tofino – By Demographics

Affordability and finding accommodation are key barriers across all age groups and most regions. Accessibility issues, preference for warm weather destinations, environmental concerns, unfamiliarity with the area, safety concerns, insufficient activities, and cultural concerns are more pronounced among younger travellers (18-34). Those with children are more likely to indicate lack of activities and attractions as a barrier.

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=	1,612	346	494	772	964	320	170	158	329	1283
Affordability/ cost of travel	81%	84%	83%	78%	82%	85%	72%	88%	83%	81%
Finding accommodation	75%	78%	76%	74%	77%	73%	76%	66%	77%	75%
Too far/ too hard to get to	73%	80%	74%	68%	77%	76%	55%	76%	75%	72%
Too busy/ crowded	66%	68%	68%	64%	69%	62%	65%	62%	69%	66%
Need to arrange a ferry to get there	66%	73%	67%	60%	75%	76%	24%	69%	70%	65%
Prefer warm weather destinations	50%	58%	47%	46%	54%	45%	44%	50%	51%	49%
Environmental concerns	43%	51%	40%	41%	46%	36%	46%	38%	42%	44%
Not familiar with the area	43%	58%	42%	34%	49%	40%	26%	46%	46%	42%
Safety concerns	42%	54%	38%	36%	48%	34%	33%	39%	45%	41%
Not enough activities & attractions	38%	49%	45%	26%	45%	32%	24%	34%	47%	35%
Cultural concerns	34%	49%	31%	27%	37%	31%	27%	37%	36%	34%

Encouraging Off-Season Visitation to Tofino (Unaided)

When asked about what would encourage visitation during the non-peak season, BC travellers most commonly mention affordability, reduced accommodation costs, and a less crowded destination. These factors align with the main barriers preventing BC travellers from visiting Tofino.



*My husband and I have been going to Tofino for the last 20 years to celebrate my birthday in April. This was the first year we did not, as all the **hotels have overpriced themselves** way beyond reason. I believe they are all trying to recoup after their losses during Covid, but we're not willing to do it on our dime. **Would not go back unless the prices were significantly reduced.***

– Past Tofino traveller

*Travelling at non-peak times **would not be so crowded**, and the **weather** in off season **is still okay in certain months.***

– Non-Tofino 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, three-quarters of respondents indicated that lower prices would be a major incentive. Promotional offers and seasonal nature-based activities also rank among the top factors encouraging off-peak visits to Tofino. 3-in-10 travellers cite that additional relaxation activities, increased opportunities for wildlife viewing, and special events would also be motivating factors for visiting.



Encouraging Off-Season Visitation – By Demographics

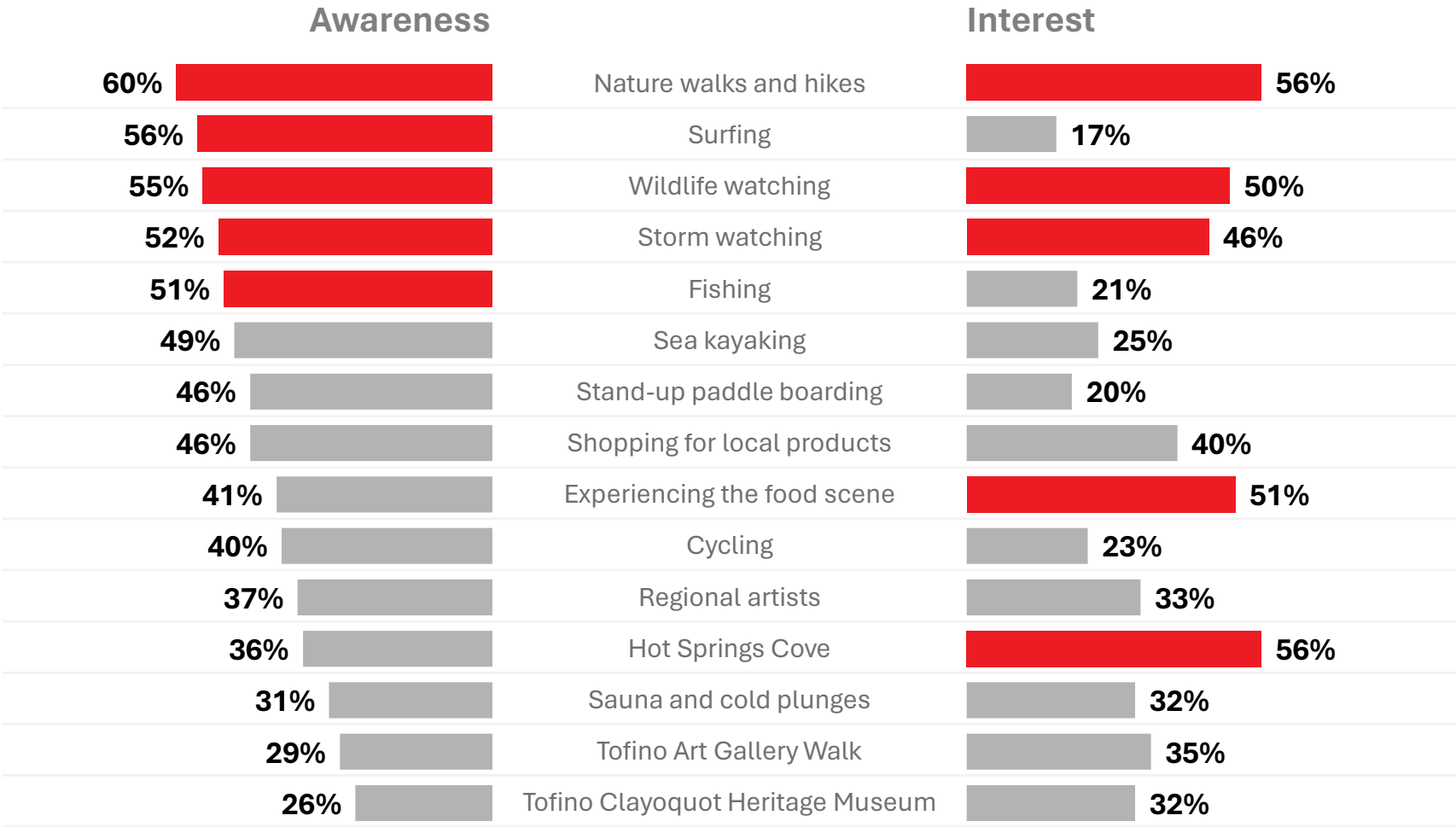
Compared to their older counterparts, younger travellers are more likely to be encouraged to visit Tofino if more relaxation/wellness, culinary classes and volunteer opportunities are offered. Older travellers show more interest in seeing lower prices, promotional offers, and seasonal nature-based activities. Additionally, those in higher income brackets are more likely to be interested in promotional offers and wine/beer tasting sessions.

Off-Peak Travel Incentives/Activities	Total	Age			Income		
		18-34	35-54	55+	<\$75K	\$75K-\$150K	\$150K
n=	1,612	346	494	772	667	592	212
Lower prices	75%	69%	77%	76%	74%	76%	77%
Promotional offers	59%	48%	60%	65%	54%	64%	63%
Seasonal nature-based activities	40%	37%	36%	45%	39%	42%	44%
More relaxation/ wellness activities	31%	37%	37%	24%	32%	33%	29%
More wildlife viewing opportunities	30%	28%	31%	30%	31%	31%	28%
Special events	30%	33%	30%	28%	31%	30%	26%
Traditional Indigenous food experiences	23%	24%	21%	24%	27%	21%	22%
Wine/ beer tasting sessions	23%	28%	23%	21%	20%	26%	28%
Indigenous arts and cultural activities	19%	19%	16%	22%	24%	16%	13%
Culinary classes	12%	18%	11%	10%	13%	12%	12%
Opportunity to volunteer while visiting	6%	12%	5%	3%	9%	5%	2%

Awareness & Interest in Tofino Activities

Nature walks and hikes, wildlife watching, and storm watching have relatively high levels of awareness and interest. Although Tofino is well known for surfing and fishing, these activities are of less interest to BC travellers overall. This suggests the importance of promoting Tofino’s wide range of activities to appeal to a wider variety of traveller types.

Over half of BC travellers are interested in visiting Hot Springs Cove and experiencing the food scene, but awareness is significantly lower. By enhancing the visibility of these activities (e.g., targeted marketing, travel influencer collaborations), Tofino can attract a broader audience 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?
Base: All respondents (n=1,612)

Interest in Tofino Activities – By Demographics

Younger travellers and those with children are more likely to be interested in active pursuits, such as sauna/cold plunges, sea kayaking, stand-up paddleboarding, and surfing. In contrast, older residents show greater interest in storm watching, regional artists, and the heritage museum.

Activities Interested In	Total	Age			Children <18 in Household	
		18-34	35-54	55+	With Children	Without children
n=	1,612	346	494	772	329	1283
Nature walks and hikes	56%	52%	62%	55%	57%	56%
Hot Springs Cove	56%	53%	61%	55%	57%	56%
Experiencing the food scene	51%	49%	52%	51%	52%	50%
Wildlife watching	50%	48%	51%	49%	55%	48%
Storm watching	46%	39%	48%	50%	47%	46%
Shopping for local products	40%	41%	39%	42%	39%	41%
Tofino Art Gallery Walk	35%	35%	30%	40%	30%	37%
Regional artists	33%	29%	28%	40%	24%	36%
Sauna and cold plunges	32%	44%	38%	21%	41%	30%
Tofino Clayoquot Heritage Museum	32%	26%	28%	39%	28%	33%
Sea kayaking	25%	41%	27%	14%	33%	23%
Cycling	23%	30%	22%	19%	23%	23%
Fishing	21%	23%	22%	18%	26%	19%
Stand-up paddle boarding	20%	32%	22%	10%	25%	18%
Surfing	17%	29%	19%	7%	23%	15%

Significantly higher than comparison group(s)

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: All respondents (n=1,612)

4

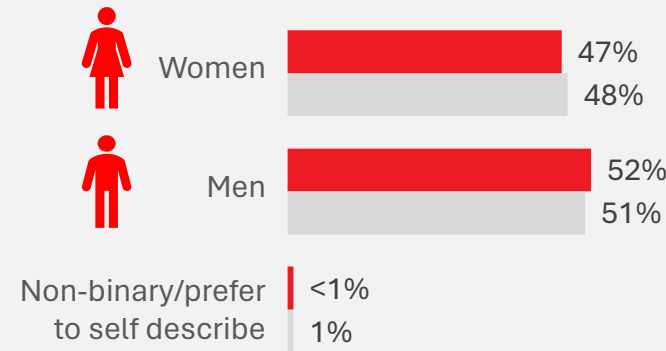
Respondent Profile



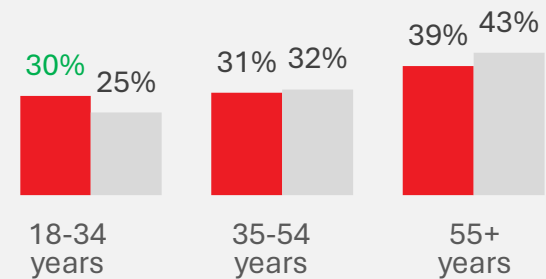
Tofino Visitor Profile

Past Tofino Visitor (n=422)
Non-Past Tofino Visitor (n=1,190)

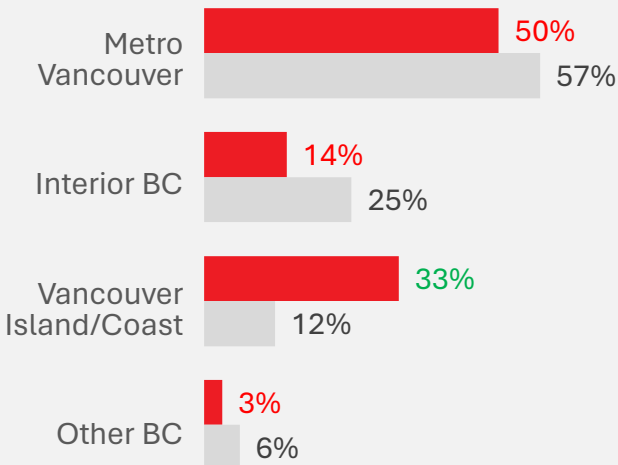
GENDER



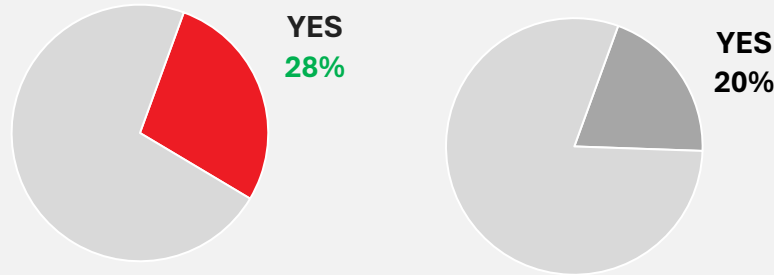
AGE



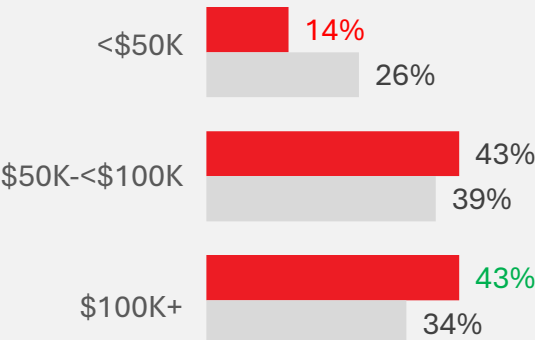
REGION



CHILDREN <18 IN HOUSEHOLD



HOUSEHOLD INCOME



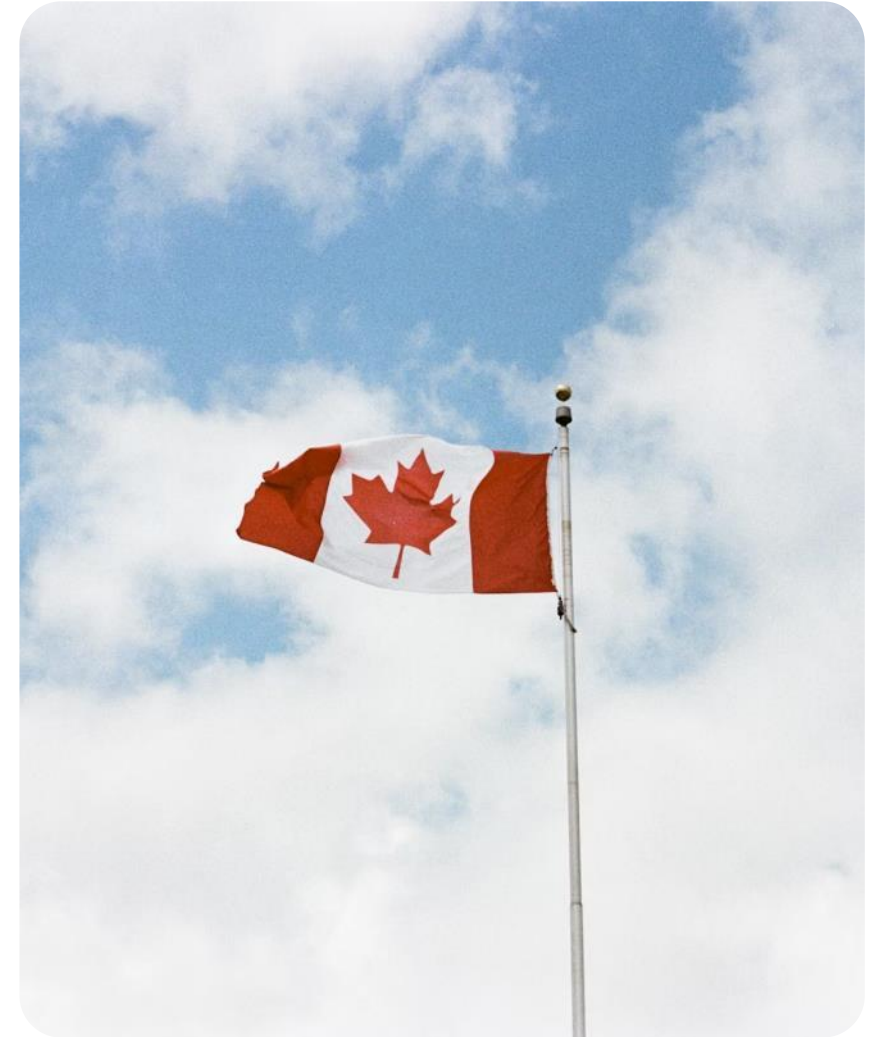
Conclusion

Compared to non-visitors, past 5-year Tofino visitors are more likely to be younger, higher income, have children less than 18 years, and reside on Vancouver Island/Coast.

Significantly higher than non-past Tofino visitors
Significantly lower than non-past Tofino visitors

5

Value Add: Canadian Traveller Survey



Methodology



Methodology

To provide additional context to the BC traveller results, an online survey was also conducted with 1,403 Canadian travellers using Leger's Canadian Omnibus.

Consistent with the BC traveller survey, 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

May 31 to June 3, 2024



Margin of Error & Weighting

For comparison purposes, a probability sample of 1,403 Canadian travellers yields a margin of error no greater than $\pm 2.6\%$, 19 times out of 20.

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



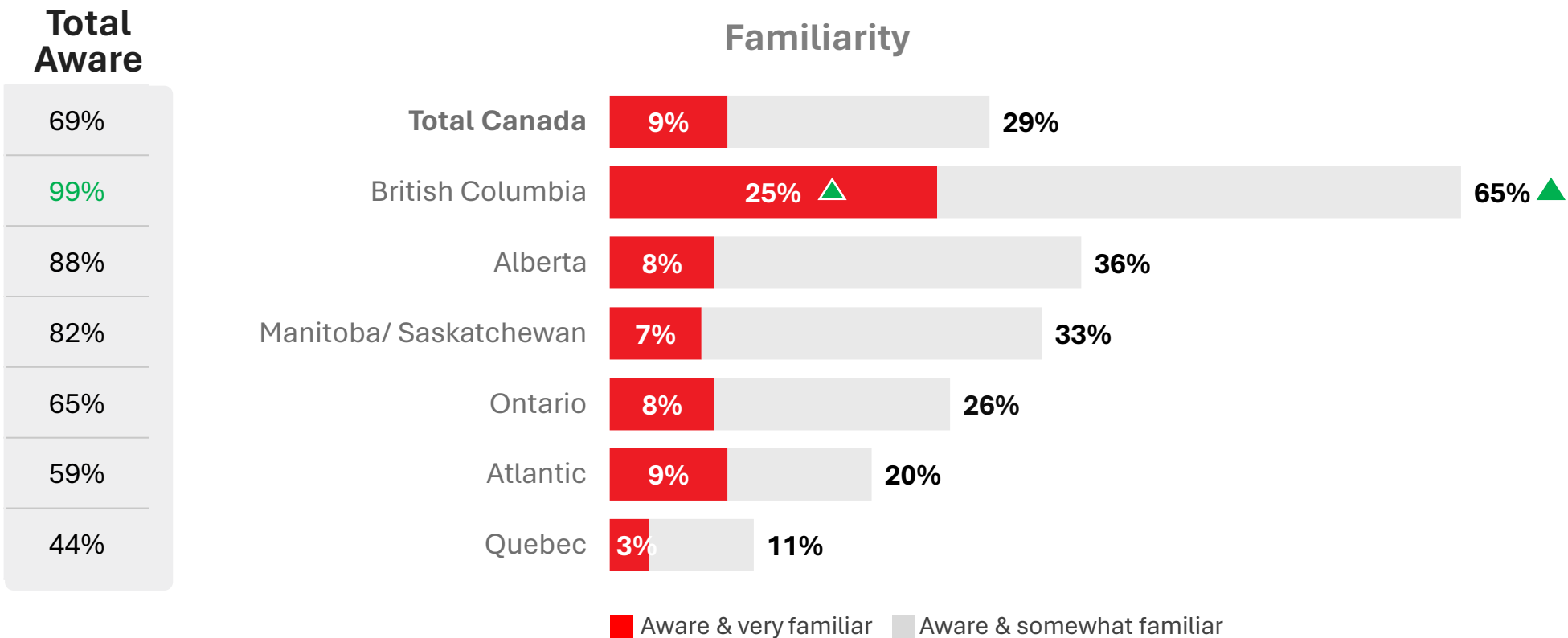
Significant Differences

Significant differences between sample subgroups are marked as follows:

- ▲ Significantly higher than comparison group(s)
- ▼ Significantly lower than comparison group(s)

Familiarity with Tofino: Canadian Travellers

As expected, awareness and familiarity with Tofino is highest in BC, followed by Alberta and Manitoba/ Saskatchewan. Although Alberta is a primary market and Ontario a secondary one, there is a significant gap between awareness and familiarity in these provinces. To address this, Tourism Tofino should launch marketing campaigns to build familiarity and showcase Tofino’s unique experiences in Alberta and Ontario. Insights and recommendations from the BC traveller survey can be applied to these markets, where appropriate.

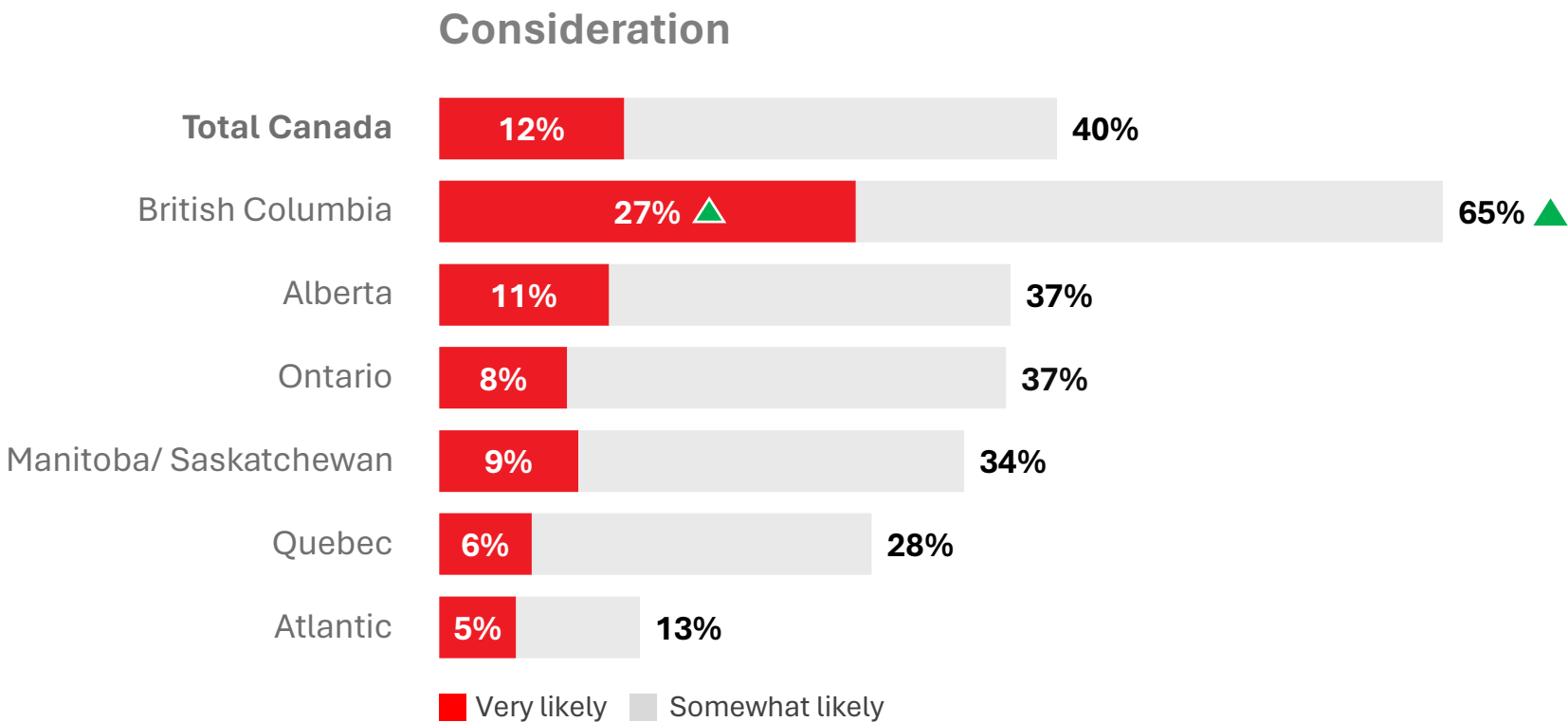


A1. How aware and familiar are you with Tofino, British Columbia?
Base: Canadian travellers (n=1,403)

▲ Significantly higher than comparison group(s)

Likelihood to Consider Visiting Tofino: Canadian Travellers

2-in-5 Canadian travellers are very or somewhat likely to visit Tofino in the next 5 years. Likelihood to visit is highest among BC residents, followed by those in Alberta, Ontario, and Manitoba/Saskatchewan.



B2. How likely are you to travel to Tofino, BC in the next 5 years?
Base: Canadian travellers aware of Tofino (n=960)

▲ Significantly higher than comparison group(s)

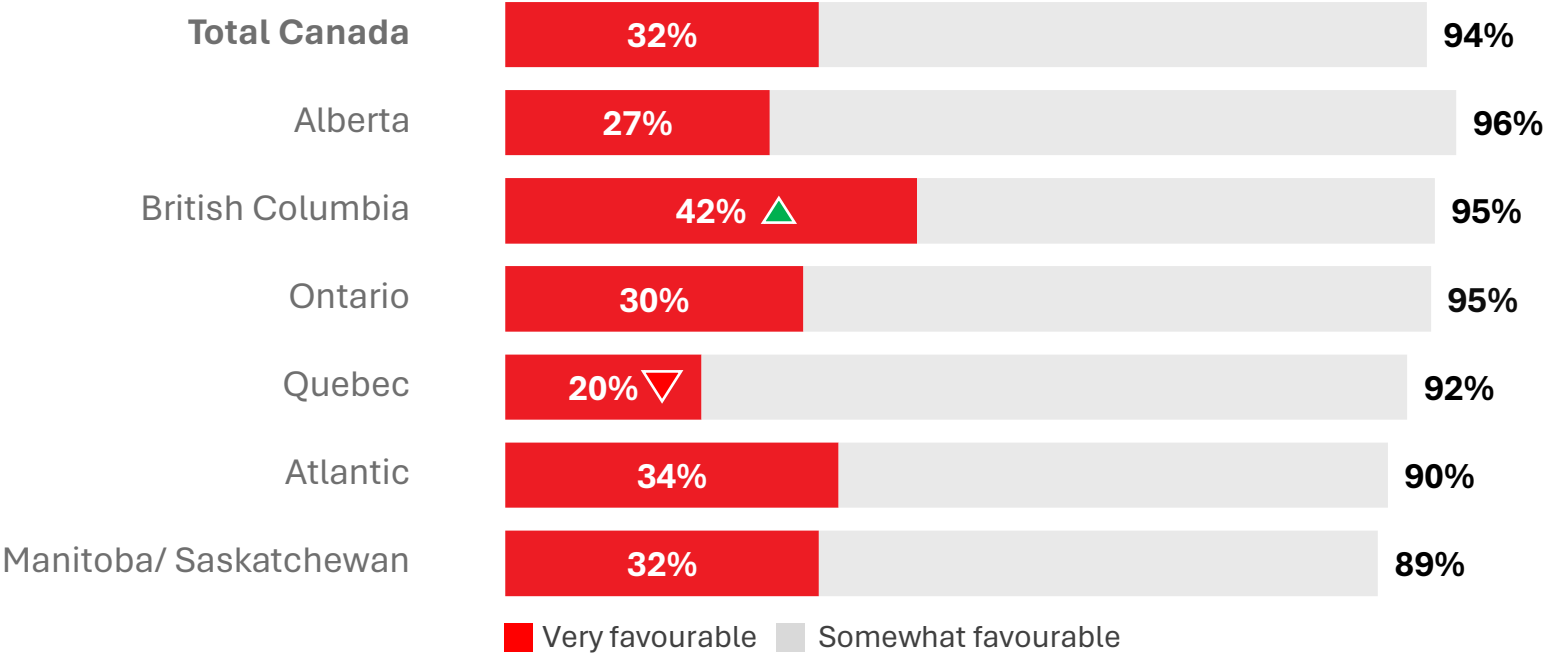
Overall Opinion of Tofino: Canadian Travellers

Overall opinion of Tofino among Canadian travellers in all provinces/regions is very positive. British Columbians award the highest “very favourable” scores, while Quebec residents award the lowest.

Not Sure

18%
17%
12%
19%
20%
36%
23%

Overall Opinion (excluding not sure)



Contact Us

For more information on this study, please contact our experts:



Jane Ha-Trapp

Senior Vice-President
jhatrapp@leger360.com
403-209-4110



Cayla Albrecht

Senior Research Analyst
calbrecht@leger360.com
604-424-1017

Our Services

Market Research

End-to-end research solutions

Customer Experience (CX)

Strategic and operational customer experience consulting services

Leger Analytics (LEA)

Data modelling and analysis

Leger Opinion (LEO)

Panel management

Leger Communities

Online community management

Leger Digital

Digital strategy and user experience

Products

Solutions that integrate AI, innovation, and the latest technologies

International Research

Worldwide Independent Network (WIN)

600
employees

185
consultants

8
offices

MONTREAL | QUEBEC CITY |
TORONTO | WINNIPEG
EDMONTON | CALGARY |
VANCOUVER | NEW YORK



Data-driven intelligence for a changing world.