

Economic Impact of Tourism in Tofino

FINAL DRAFT REPORT

Prepared for Tourism Tofino

Prepared by InterVISTAS Consulting Inc.

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Executive Summary

Tourists visiting Tofino, in Tla-o-qui-aht territory, and the surrounding area support economic growth and development. Through the operations and activities of various businesses that provide goods and services to out-of-town visitors, tourism contributes directly to local employment and the regional economy. The Tofino area provides visitors with a rich variety of outdoor adventures, stunning natural landscapes, and cultural experiences year-round. Its thriving tourism industry plays a vital role in supporting the local economy and the Province of British Columbia as well.

This study evaluates the economic impact of tourism in the Tofino area in 2024, based on estimates of visitor volumes and visitor spending. The analysis focuses on the District of Tofino, measuring the contributions of tourism through various indicators, including jobs supported by the tourism industry and the sector's contribution to Gross Domestic Product (GDP). This study builds upon a visitor intercept survey conducted from October 2023 to September 2024, which captures results across all four seasons, as well as an employment survey of tourism related businesses carried out from February to September 2024.¹

What Is Economic Impact?

Economic impact is a measure of the spending and employment associated with a sector of the economy (e.g., tourism), a specific project, or a change in government policy or regulation. In this case, economic impact refers to the economic contribution associated with the activities of Tofino's tourism sector, which includes accommodations, food/beverage and retail, local attractions, and local transportation providers.



*The economic impact of
tourism in the Tofino area in 2024
includes 3,190 direct jobs,
generating \$183 million in direct GDP.
Visitors spent a total of \$430 million.*

Source: Tourism Tofino/Jeremy Koreski

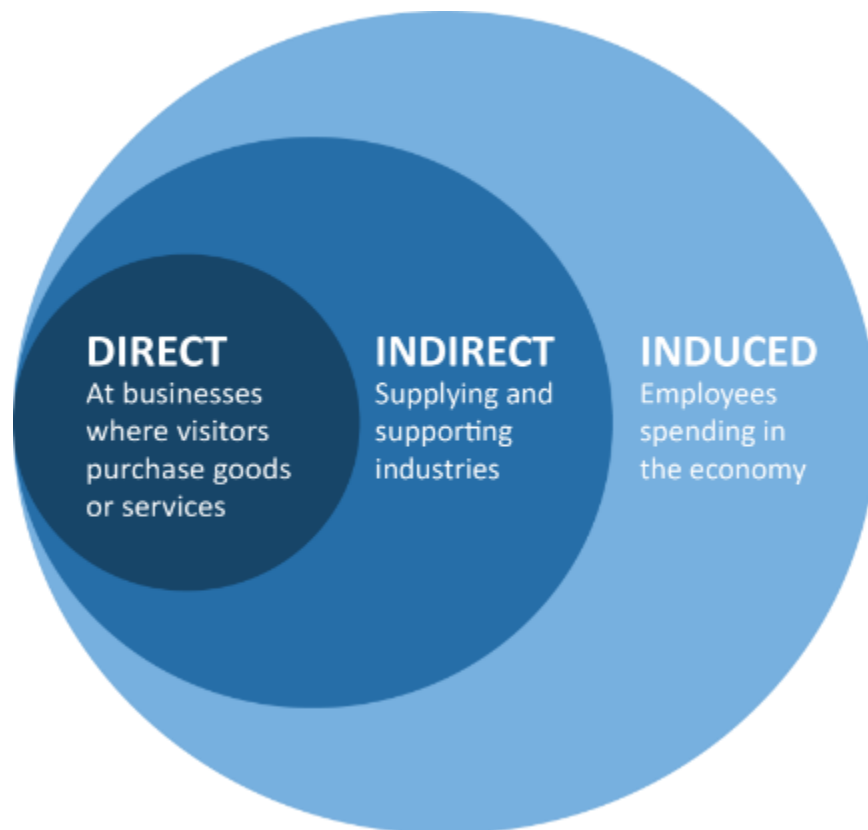
¹ This study is not directly comparable to the previous 2019 study, which was based on a visitor intercept survey conducted from June to September 2018, whereas the current study encompasses visitors across all four seasons. As with any study reliant on survey data, results should be interpreted with caution, considering potential limitations in response accuracy and representation.

Economic impact can be measured in several ways:

- Employment (Jobs);
- Wages;
- Gross Domestic Product (GDP); and
- Economic output.

The three major components of economic impact are classified as *direct, indirect, and induced impacts* – which capture how the economic impact of Tofino’s tourism industry cascades throughout the entire local and provincial economy. **Figure ES-1** illustrates the various elements that account for the economic impact of Tofino’s tourism industry.

Figure ES-1: Economic Impact Overview of Tofino’s Tourism Industry



2024 Tofino Visitor Profile and Spending

In 2024, Tofino welcomed approximately 78,800 same day visitors and over 632,400 overnight guests.² During the year, total visitor spending in the region reached an estimated \$430 million, covering accommodations, local attractions, food/beverage, and retail purchases.³

Figure ES-2: Estimated Visitor Volumes and Visitor Spending in Tofino, 2024



Source: Estimated visitors and visitor spending is based on InterVISTAS analysis of the visitor intercept survey undertaken and other data sources related to accommodations expenditures.

The visitor survey undertaken collected information on visitor characteristics, needs and preferences, satisfaction and average expenditures, while in Tofino.⁴ A total of 3,047 intercept surveys, covering all four seasons, were considered for the analysis. Key insights from the visitor survey include:

- **Purpose of Trip:** The majority (88.9%) of visitors to Tofino in 2024 were visiting for the purpose of leisure/vacation. The most popular reason for visiting Tofino in 2024 was for a family vacation (64.3%).
- **Area of Origin:** Most of Tofino's visitors come from the domestic market (85%), while the U.S. and international markets contribute nearly equally, accounting for 8% and 7% of visitors, respectively.
- **Length of Trip and Travel Party Size:** Mini vacations of 3-4 nights were the most common trip length to Tofino. The average party size was 3.4 people.
- **Type of Activities:** The top activities for visitors in 2024 were visiting beaches, parks and trails, restaurants/food trucks/coffee shops, local shops/boutiques and hiking.
- **Visitor Satisfaction:** Visitors were likely to refer others to Tofino as a place to visit, with a Net Promoter Score of +77.6 in 2024.

² Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey. These figures represent total visitor trips and do not account for unique visitors, as individuals may visit Tofino multiple times throughout the year. Details are provided in **Appendix A**.

³ Total tourism expenditures are based on visitor spending averages from the visitor intercept survey.

⁴ Details on the visitor intercept survey results are provided in **Appendix B**.

2024 Economic Impact

The *direct* economic impact driven by visitor activities in the Tofino area includes employment across sectors such as accommodations, restaurants, retail, local transportation (e.g., taxis, shuttles, car rentals), and other industries where visitors spend money. These direct impacts further stimulate the economy, creating indirect and induced effects. *Indirect* impacts arise from industries that supply goods and services to tourism-related businesses, such as maintenance companies servicing hotels and vacation rentals. *Induced* impacts result from the spending of individuals employed directly or indirectly by the tourism sector. The total economic impact is calculated by combining direct, indirect, and induced effects.

Direct Economic Impact

In 2024, visitor activities in Tofino directly supported approximately 3,190 jobs,⁵ generating \$131 million in wages and salaries, with an average annual wage of \$41,100 per job. This direct employment contributed approximately \$183 million to the province's GDP and \$383 million in direct economic output. Accommodations providers, offering over 1,890 rentable units, accounted for 36% of all direct tourism-related employment in Tofino, representing approximately 1,140 jobs. Other tourism-related sectors, including outdoor attractions, arts, culture, entertainment, and local transportation, made up 13% of direct employment, totaling around 430 jobs. In addition, tourists spent an estimated \$144 million on food, beverages, and retail shopping in 2024, supporting nearly 1,620 jobs.⁶

A diverse range of businesses supports Tofino's tourism industry, with the largest sectors in 2024 being food and beverage, followed by accommodations. **Figure ES-3**

2024 Economic Impact of Tourism in Tofino

Direct Impacts:

- \$430 million in visitor spending
- 3,190 jobs
- \$131 million in wages
- \$183 million in gross domestic product (GDP)
- \$383 million in economic output

Source: Tourism Tofino/Emily Baxter

⁵ Jobs include those who are employed on a full-time, part-time and seasonal basis.

⁶ According to the visitor intercept survey, the average estimated visitor expenditure in Tofino is \$149 per person per trip on food and beverage, and an average of \$53 per person per trip on retail purchases. The visitor spending analysis in this report does not include amounts spent on accommodation, attractions, and outdoor recreation as the economic impact of those industries were analyzed based on the employment survey.

provides a detailed breakdown of direct tourism-related employment by business type.

Figure ES-3: 2024 Tourism Related Direct Employment in Tofino by Business Type
(Based on 3,190 Direct Jobs of Employment)



Note: Figures may not sum to totals due to rounding.







Source: Tourism Tofino/Celina Frisson

Total Economic Impact of Tourism in Tofino

Including indirect and induced multiplier impacts, the economic impact of tourism in Tofino in the Province of British Columbia was estimated to be a total of approximately 4,440 jobs in 2024. The total earnings of all employment amounted to \$211 million in wages. Furthermore, visitor activities in the region contributed an estimated \$345 million and \$657 million in total GDP and total economic output to the provincial economy, respectively. The total economic impacts of Tofino's tourism sector in 2024 are summarized in **Figure ES-4**.

Figure ES-4: Total Economic Impact of Tourism in Tofino, 2024

				
Component	Employment Jobs	Wages (\$ Millions)	Value-Added GDP (\$ Millions)	Economic Output (\$ Millions)
Accommodations	1,140	50	95	191
Other Tourism Related*	430	23	23	48
Visitor Spending**	1,620	58	65	144
Total Direct	3,190	131	183	383
Indirect	740	49	84	154
Induced	510	31	77	120
Grand Total --	4,440	211	345	657

Notes:

* Other tourism industries impact reflects employment in activities, attractions, and other supporting businesses and organizations of the tourism sector in the region.

** An estimated 1,620 jobs are associated with visitor spending that takes place in the Tofino area. The level of visitor spending is based on the 2023/2024 visitor intercept survey, and includes expenditures on food/beverage, and retail purchases.

-- Figures may not sum to totals due to rounding.

Tax Impacts of Tourism in Tofino

Tourism in Tofino is also an important source of tax revenues for all levels of government. Total taxes paid by tourists, employers, and employees in Tofino's tourism industry in 2024 are estimated at \$108 million.

In 2024, tourism related employees and employers contributed a total of \$66 million in government revenues, accounting for 61% of total tax contributions. The remaining 39% of taxation revenues (equal to \$42 million) was generated by sales taxes and other local taxes levied on tourist expenditures on accommodations, retail, food and beverage, entertainment, and local transportation. **Figure ES-5** provides a summary of 2024 tax contributions by taxpayer.

The majority of taxes collected (61%) accrued to the federal government at \$66 million. The provincial government received an estimated \$36 million in tax revenues (33% of total). Municipal governments also benefit from Tofino's tourism industry through the collection of business and residential property taxes and the Municipal and Regional District Tax (MRDT), estimated at approximately \$6 million, in total as shown in **Figure ES-4**.

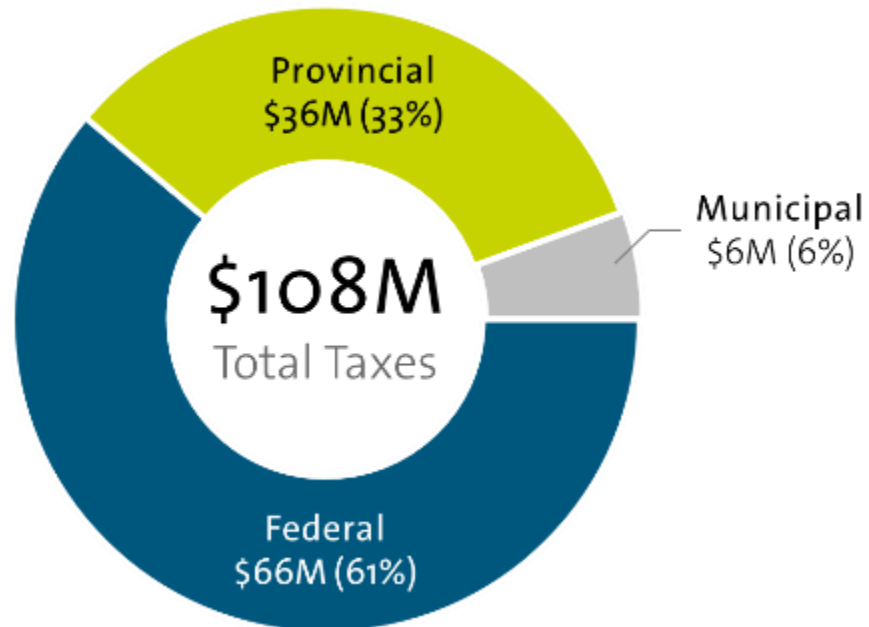


Figure ES-5: 2024 Tax Contributions of Tourism in Tofino, by Taxpayer

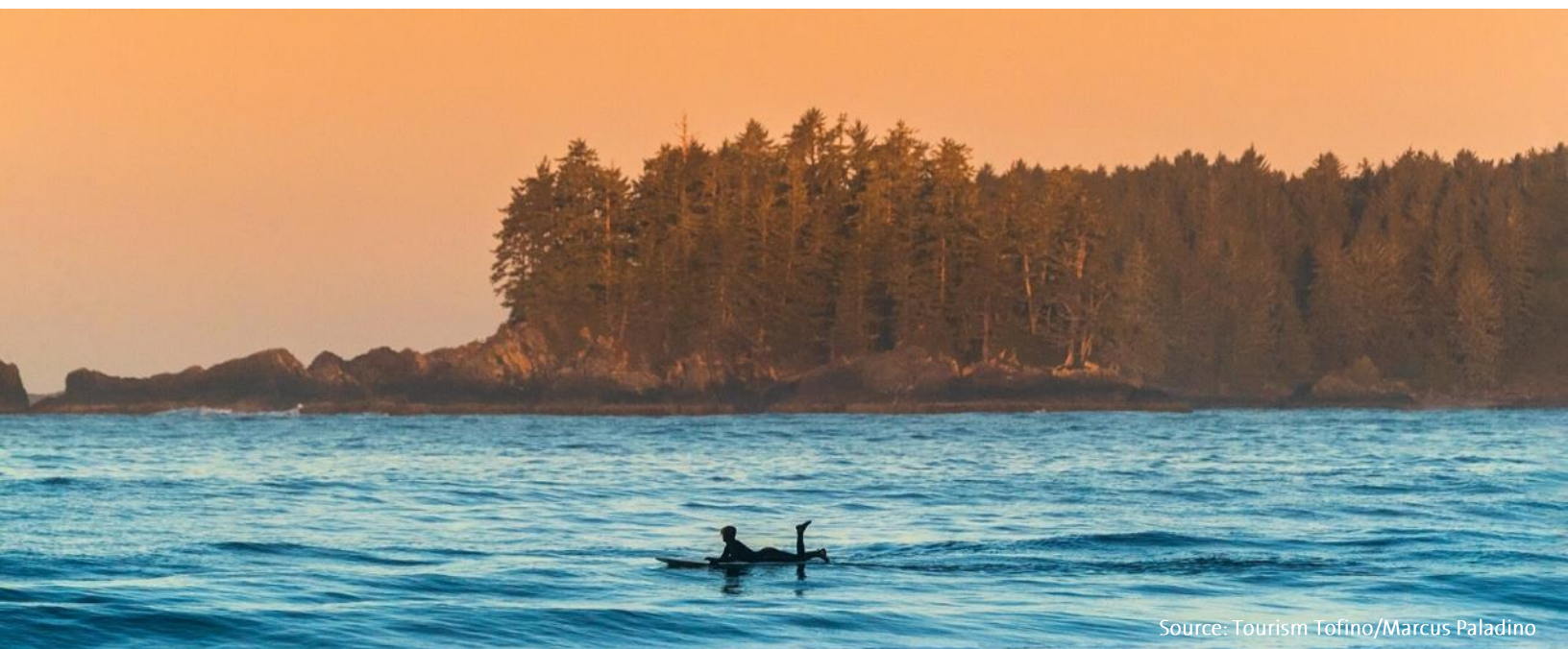
Taxpayer	Federal (\$ Millions)	Provincial (\$ Millions)	Municipal (\$ Millions)	Total (\$ Millions)
Tourism Related Businesses	\$47	\$16	\$3	\$66
Employees and Employers				
Tourists	\$20	\$20	\$3	\$42
Total	\$66	\$36	\$6	\$108

Note: Figures may not sum to totals due to rounding.

Figure ES-56: Estimated Tax Revenues of Tofino's Tourism Industry, by Level of Government, 2024



Note: Figures may not sum to totals due to rounding.



Source: Tourism Tofino/Marcus Paladino

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1 Introduction

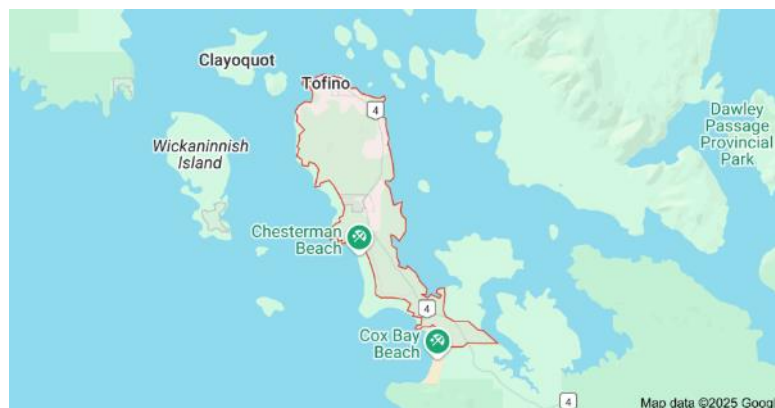
Tourism Tofino commissioned InterVISTAS Consulting Inc (InterVISTAS) to undertake an economic impact assessment of Tofino’s tourism industry in 2024. This study updates the prior analysis that was completed in 2019. The current study builds upon the visitor intercept survey executed between October 2023 and September 2024, which is reflective of all four seasons.⁷

The study highlights the significant economic impact of tourism in Tofino. Tourism directly supports employment and drives economic growth in the region through the activities of various businesses meeting the needs of tourists. It serves as a major economic engine for the local economy, the Province of British Columbia, and beyond.

1.1 The Tofino Area

Tofino, a picturesque coastal town on the west coast of Vancouver Island, is renowned for its stunning natural landscapes, including expansive beaches, lush rainforests, and dramatic ocean views. Situated within the traditional territory of Tla-o-qui-aht First Nation, Tofino has its roots in Indigenous culture and history, which continue to shape the area’s identity. The town of Tofino started as a small fishing and logging community, it has since transformed into a premier destination for eco-tourism and outdoor adventure. Today, it attracts visitors from around the world, drawn to its designation as a UNESCO Biosphere Region, proximity to the Pacific Rim National Park Reserve, world-class surfing, wildlife viewing, and access to the pristine land and waters of Clayoquot Sound. As depicted in **Figure 1-1**, the focus of this study is on the tourism sector and related businesses in Tofino.

Figure 1-1: Map of the Tofino Area



Source: Google Maps

⁷ This study is not directly comparable to the previous 2019 study, which was based on a visitor intercept survey conducted from June to September 2018, whereas the current study encompasses visitors across all four seasons. As with any study reliant on survey data, results should be interpreted with caution, considering potential limitations in response accuracy and representation.

Tofino's population is just over 2,500 as of Census 2021. Although Tofino is small, its population surges dramatically during the tourist season in the summer due to tourists and seasonal workers. While renowned for its natural beauty, Tofino has also emerged as a hub for sustainable tourism and eco-conscious businesses. The town serves as a base for local enterprises specializing in outdoor recreation, sustainable hospitality and artisan crafts, drawing inspiration from the surrounding environment. Tofino's economy is supported by a strong commitment to preserving its ecosystems, with local organizations and businesses prioritizing environmental stewardship and community well-being.

In addition to its thriving tourism sector, visitors can explore Tofino's rich cultural heritage through art galleries, cultural tours, and community events that celebrate Indigenous culture. Beyond its cultural and economic contributions, Tofino's natural attractions, including Pacific Rim National Park Reserve and Long Beach, offer year-round opportunities for outdoor adventures, from hiking to storm-watching. Together, these elements make Tofino a sought-after destination for travellers, nature enthusiasts, and those seeking a deeper connection to the environment and its history.

1.2 What is Economic Impact?

Economic impact measures the spending and employment linked to a specific economic sector (like tourism), a particular project (such as building a new facility), an economic activity, or changes in government policy or regulation. In this context, economic impact refers to the economic contributions from Tofino's tourism sector, encompassing accommodations, food and beverage services, retail, local attractions, and transportation providers.

Economic impact can be assessed through various metrics, including employment, income, Gross Domestic Product (GDP), and economic output, as illustrated in **Figure 1-2**. The significance of Tofino's tourism industry is underscored by these four measures, which collectively express the overall level of activity or expenditure generated by this sector. Although they are not "net" measures that weigh benefits against costs, they can be useful in developing an appreciation of projects, investments, and economic sectors.



Source: Tourism Tofino/Kyler Vos

Figure 1-2: Measures of Economic Impact

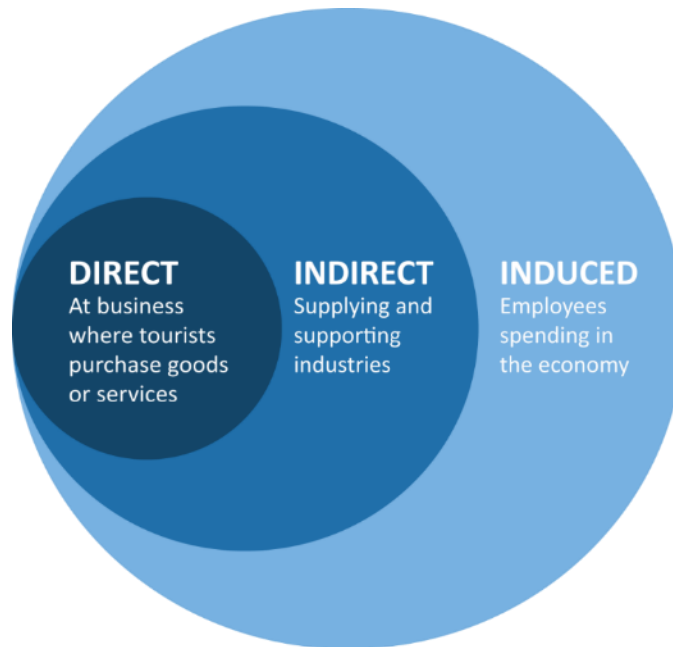
Employment	Wages	Gross Domestic Product (GDP)	Economic Output
<ul style="list-style-type: none"> • The number of jobs businesses employ directly or indirectly linked to activities and operations in Tofino's businesses that serve non-local visitors to the region. • The employment figure includes full-time, part-time and seasonal employment. 	<ul style="list-style-type: none"> • The wages, salaries, bonuses, benefits, and other remuneration earned by people linked to activities and operations of Tofino's tourism sector. 	<ul style="list-style-type: none"> • The value of the operating surpluses (i.e. the "value-add") of businesses linked to activities and operations serving Tofino's visitors, plus the remuneration and net indirect taxes paid to government. 	<ul style="list-style-type: none"> • The total gross spending (i.e., capital improvement plus revenue) by firms, organizations and individuals involved in activities linked to operations at Tofino's tourism-related firms, including intermediate consumption.

1.3 Categories of Economic Impact

The three major components of economic impact in this study are classified as *direct*, *indirect*, and *induced* impacts, which collectively capture the economic benefits of Tofino's tourism industry to the local and provincial economy. Figure 1-3 illustrates the various elements that account for the economic impact of Tofino's tourism industry.

- **Direct** impacts account for the economic activity of the target sector itself. Direct employment impacts are measured by counting the number of individuals who work in a particular sector of the economy. In the tourism sector, this includes all those people who provide services to non-local visitors (e.g., a hotel housekeeping staff, a Tourism Tofino employee who works at the Visitor Centre, a local tour guide, etc.).
- **Indirect** impacts are those that are generated from the activities of the direct impacts. This involves employment, wages, GDP, and economic output generated by industries that arise from the presence of the tourism industry. For example, indirect employment could include local equipment suppliers providing kayaks, surfboards, or hiking gear to tour operators in Tofino (i.e., any businesses that supply or provide services to those firms directly serving Tofino's tourism sector).
- **Induced** impacts are economic impacts created by the spending of wages, salaries, and profits earned by those working in direct and indirect economic activities related to Tofino's tourism industry. For example, induced impacts would include a restaurant employee's purchases of consumer goods such as food, clothing, electronics, etc. Induced impact is often referred to as the "household-spending effect".
- **Total** impacts are the sum of direct, indirect, and induced effects.

Figure 1-3: Economic Impact Overview of the Tourism Industry



1.4 Scope of the Study

Tofino's tourism industry generates employment for individuals with jobs in the accommodations industry, attractions, and other support organizations that serve non-local visitors. These visitors also spend money on local ground transportation, food and beverage, retail, etc. This study estimates the economic impacts and tax impacts generated by Tofino's tourism sector as follows:

- **Employment Impacts:** Economic impacts associated with employment in Tofino's tourism sector in the following industries: accommodations, outdoor recreation, guided tours, arts/cultural entertainment, and transportation services.
- **Visitor Spending Impacts:** Economic impacts generated by visitor spending in Tofino related to food/beverage and retail.
- **Tax Impacts:** Estimated tax revenues generated by the employment and visitor spending impacts of Tofino's tourism sector were assessed.
- **Visitor Intercept Survey:** Visitors to Tofino were surveyed from October 2023 to September 2024 to develop an understanding of their profile and behaviour of visitors, including participation in tours, activities, and trip expenditures.

- **Annual Visitor Traffic to Tofino:** Drawing on data available on Tofino's paid accommodation industry, findings from the visitor intercept survey, and other relevant data, the total number of visitors to Tofino was estimated for 2024. This included consideration of seasonal changes in visitor volumes, accommodation choices, party sizes and lengths of stay.

The associated economic impacts of tourism are measured in several ways, including visitor spending in the local economy, employment (jobs) supported by Tofino's tourism industry, and the sector's contribution to GDP.



2 Tofino's Tourism Industry Snapshot

2.1 Introduction

Tofino thrives with a vibrant cultural and natural scene, offering a unique blend of Indigenous heritage, outdoor adventure, and modern amenities that captivate visitors. The town boasts a diverse accommodation sector, with options ranging from boutique lodges and beachfront resorts to cozy cabins and eco-friendly retreats, ensuring a memorable stay for every traveller. The thriving culinary scene allows visitors to enjoy a variety of dining options, from freshly caught seafood and locally sourced ingredients to globally inspired dishes with a West Coast twist. Tofino is also home to iconic natural attractions, such as the Pacific Rim National Park Reserve, Long Beach, and Clayoquot Sound, a designated UNESCO Biosphere Region. These natural wonders, along with the town's commitment to sustainability and eco-tourism, make Tofino a sought-after destination for nature enthusiasts, surfers, and cultural explorers alike.

2.2 Accommodations Industry

Tofino's paid accommodations industry is a vital component of its tourism sector, offering a diverse range of options to suit various preferences and budgets. Tofino has a broad mix of paid accommodations available for visitors to the region, including hotels/motels/resorts/lodges, bed & breakfast, hostels, campground/RV, and short-term rentals. This broad offering can cater to different types of travellers, from budget conscious families to luxury vacationers.

Figure 2-1: Tofino's Accommodations Profile, 2024



Source: InterVISTAS Consulting survey of tourism related businesses.

2.3 Visitors to Tofino and Visitor Spending

In 2024, Tofino attracted approximately 78,800 same day visitors and more than 632,400 overnight guests.⁸ Visitor spending throughout the year totalled an estimated \$430 million, encompassing accommodations, local attractions, dining, and retail purchases.⁹

Figure 2-2: Estimated Visitor Volumes and Visitor Spending in Tofino, 2024



Source: Estimated visitors and visitor spending is based on InterVISTAS analysis of the visitor intercept survey undertaken and other data sources related to accommodations expenditures.

The visitor survey undertaken collected information on visitor characteristics, needs and preferences, satisfaction and average expenditures, while in Tofino.¹⁰ A total of 3,047 intercept surveys, covering all four seasons, were considered for the analysis. Key insights from the visitor survey include:

- **Purpose of Trip:** The majority (88.9%) of visitors to Tofino in 2024 were visiting for the purpose of leisure/vacation. The most popular reason for visiting Tofino in 2024 was for a family vacation (64.3%).
- **Area of Origin:** Most of Tofino's visitors come from the domestic market (85%), while the U.S. and international markets contribute nearly equally, accounting for 8% and 7% of visitors, respectively.
- **Length of Trip and Travel Party Size:** Mini vacations of 3-4 nights were the most common trip length to Tofino. The average party size was 3.4 people.
- **Type of Activities:** The top activities for visitors in 2024 were visiting beaches, parks and trails, restaurants/food trucks/coffee shops, local shops/boutiques and hiking.
- **Visitor Satisfaction:** Visitors were likely to refer others to Tofino as a place to visit, with a Net Promoter Score of +77.6 in 2024.

⁸ Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey. These figures represent total visitor trips and do not account for unique visitors, as individuals may visit Tofino multiple times throughout the year. Details are provided in **Appendix A**.

⁹ Total tourism expenditures are based on visitor spending averages from the visitor intercept survey.

¹⁰ Details on the visitor intercept survey results are provided in **Appendix B**.

2.3.1 Visitor Volume

The total number of visitors is estimated based on data available on total accommodations providers, average monthly occupancy rates, and visitor profile information collected by the intercept survey of Tofino visitors.¹¹

Figure 2-3 below summarizes the estimated annual visitor numbers to Tofino by accommodation type, totalling 711,200 individual visitors. Most visitors stay in hotels, motels, resorts, lodges, and inns, followed closely by those staying in paid campgrounds/RV parks and short term rentals. The estimated visitor volume aligns closely with the overall accommodation profile captured by the visitor intercept survey.¹²

Figure 2-3: Estimated Annual Visitor Volume to Tofino, 2024

Accommodation Category	Total Annual Individual Visitor Volume	
	Number	%
Hotel / Motel / Resort / Lodge / Inn	384,100	54.3%
Campground / RV Park	101,000	12.9%
Short Term Rental	75,100	11.5%
Day Visitors	78,800	11.1%
Home of a Friend or Family Member	26,600	3.7%
Non-paying Campers	26,600	3.4%
Hostel	2,900	1.1%
Bed & Breakfast	8,700	0.9%
Second Home	3,100	0.4%
Other	4,400	0.6%
Total	711,200	100.0%

Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey. Visitor volumes represent the total number of visitor trips and do not account for unique visitors, as individuals may visit Tofino multiple times within the year.

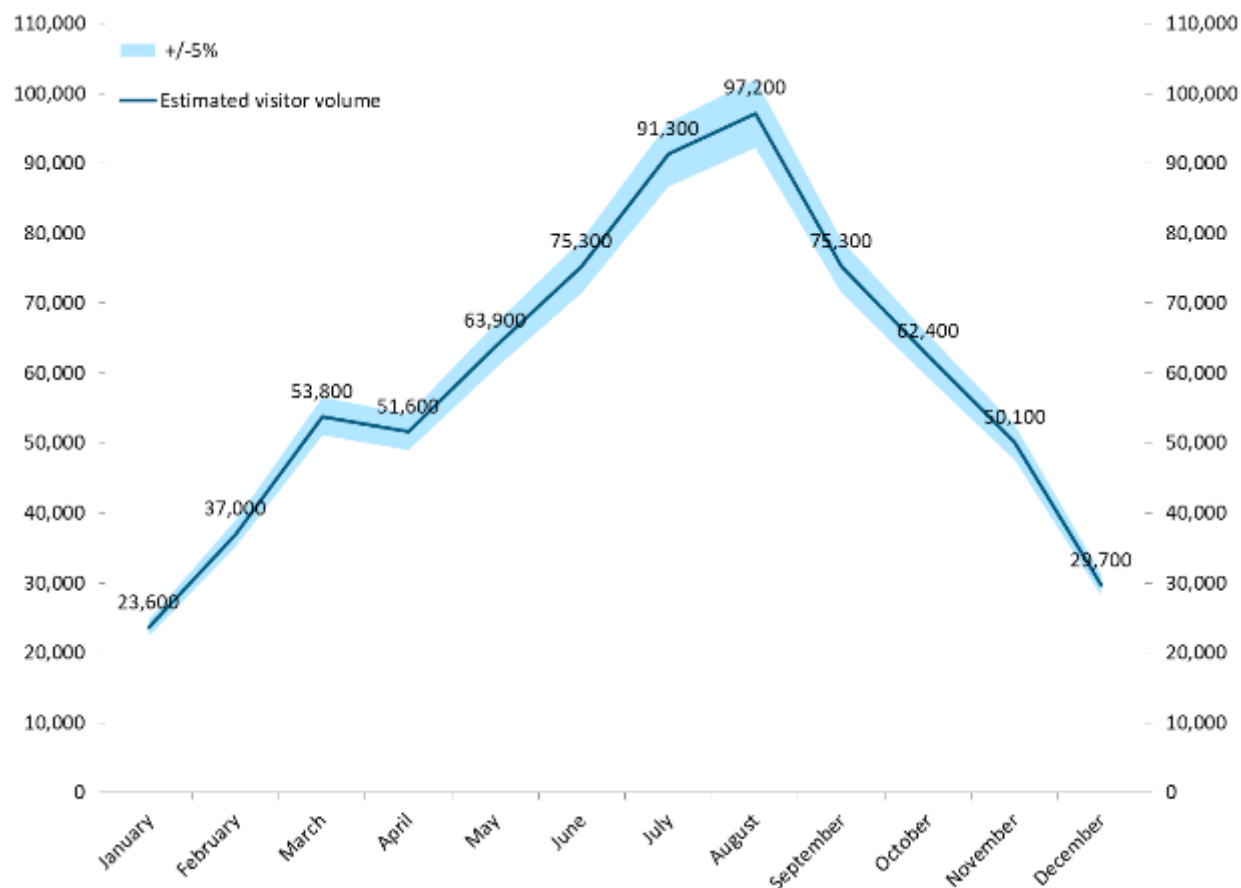
Note: Figures may not sum to totals due to rounding.

¹¹ Visitor volumes represent the total number of visitor trips and do not account for unique visitors, as individuals may visit Tofino multiple times within the year. Detailed methodological approach for this estimation is set out in **Appendix A**.

¹² The percentages from the visitor volumes model are considered more accurate than the visitor intercept survey results, as they incorporate a broader range of data, such as accommodation count, capacity, length of stay, and occupancy, and are refined through further analysis.

The model incorporates seasonal variations in average length of stay and occupancy rates across different types of paid accommodation. The resulting seasonal fluctuations in visitor volume to Tofino, shown in **Figure 2-4**, include a 5% upper and lower bound. The model estimates a peak of 97,200 individual visitors in August, compared to a monthly low of 23,600 visitors in January.

Figure 2-4: Estimated Annual Same Day & Overnight Visitor Volume to Tofino by Month, 2024



Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey.

Note: Figures may not sum to totals due to rounding.

The methodology behind the visitor volumes in **Figure 2-3** and **Figure 2-4** estimates the number of individual visitors to Tofino, factoring in average lengths of stay, rather than the total number of visitor nights. To estimate total visitor nights, the model was adjusted to account for maximum theoretical occupancy and average occupancy levels, while factoring in average length of stay. This estimate reflects the physical number of visitors in Tofino throughout the year, whether staying in paid or non-paid

accommodation, rather than the count of individual visitors. For clarity, the visitor nights estimate would count a party of two staying for three nights as six visitor nights, while the individual visitors estimate would count them as two visitors.

Figure 2-5 summarizes the annual estimate of visitor nights in Tofino, showing that 89% of visitor nights are spent in paid accommodations, while 11% are in non-paid accommodations.¹³ Excluding day visitors, a total of 1,920,900 visitor nights were spent in Tofino. This estimate reflects the total number of beds occupied by visitors across both paid and non-paid accommodation types throughout the year.

Figure 2-5: Estimated Annual Visitor Nights in Tofino, 2024

Accommodation Category	Annual Total Visitor Nights	
	Number	%
Hotel / Motel / Resort / Lodge / Inn	930,300	48%
Campground / RV Park	434,100	23%
Vacation Rental Home / Condo (Airbnb, VRBO, Private Rental, etc.)	311,000	16%
Bed & Breakfast	17,900	1%
Hostel	10,100	1%
Total visitor nights in paid accommodation	1,703,400	89%
Non-paying Campers	114,100	6%
Home of a Friend or Family Member	80,700	4%
Second Home	9,300	0.5%
Other	13,400	1%
Total visitor nights in non-paid accommodation	217,500	11%
Total visitor nights	1,920,900	100%

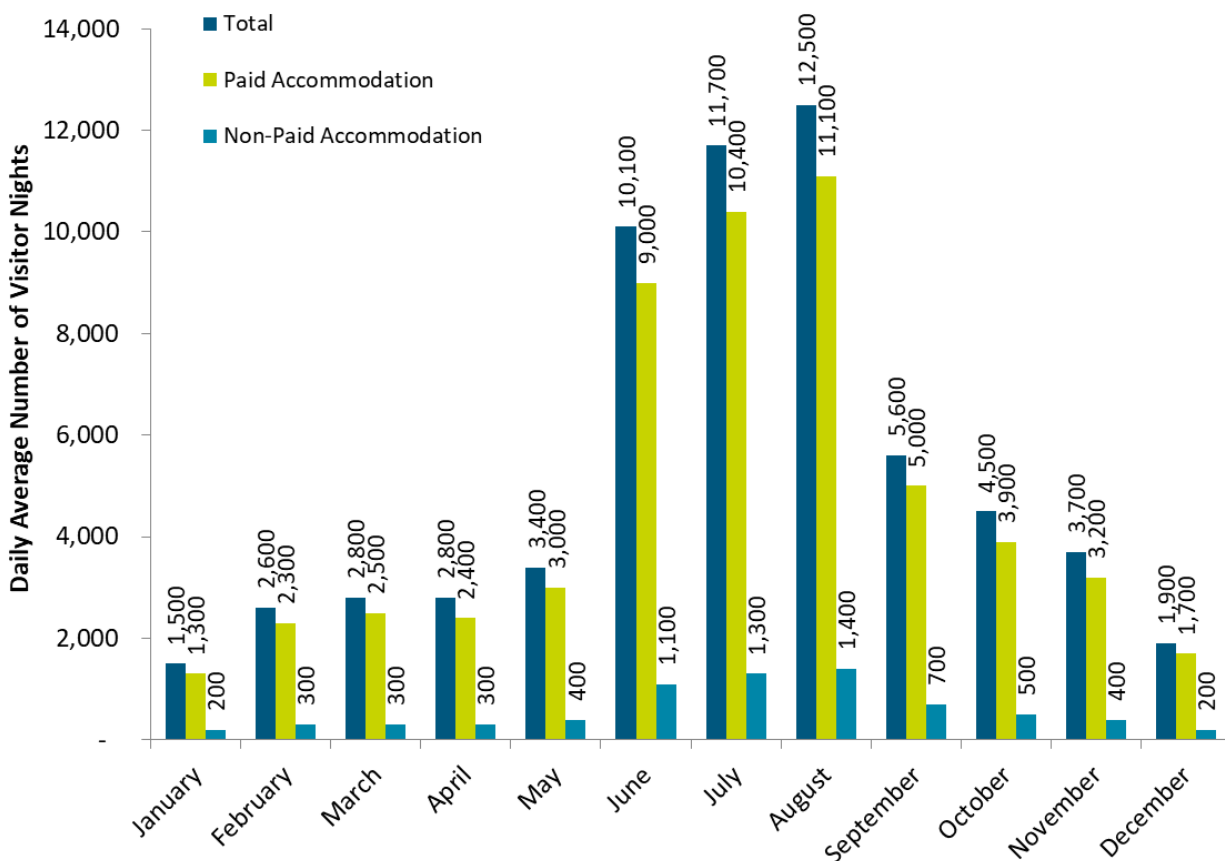
Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey.

Note: Figures may not sum to totals due to rounding.

¹³ The visitor volumes model produces more accurate percentages than the intercept survey, as it uses a wider set of data, including accommodation count, capacity, length of stay, and occupancy, and is further refined through detailed analysis.

Figure 2-6 illustrates the daily average number of visitor nights in Tofino by month, starting at a low of 1,500 in January and rising to 12,500 in August.¹⁴ The annual average daily visitor nights is 5,300. In August, the daily visitor nights in paid accommodation peak at approximately 11,100, while January sees a low of 1,300. Visitor nights in non-paid accommodation follow a similar pattern, with a peak of 1,400 per day in August and a low of 200 in January.

Figure 2-6: Average Daily Visitor Nights in Tofino, 2024



Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey.

Note: Figures may not sum to totals due to rounding.

¹⁴ Differences between monthly visitor counts and monthly average visitor nights are primarily driven by variations in length of stay, whereby longer durations result in higher visitor night averages despite comparable visitor volumes.

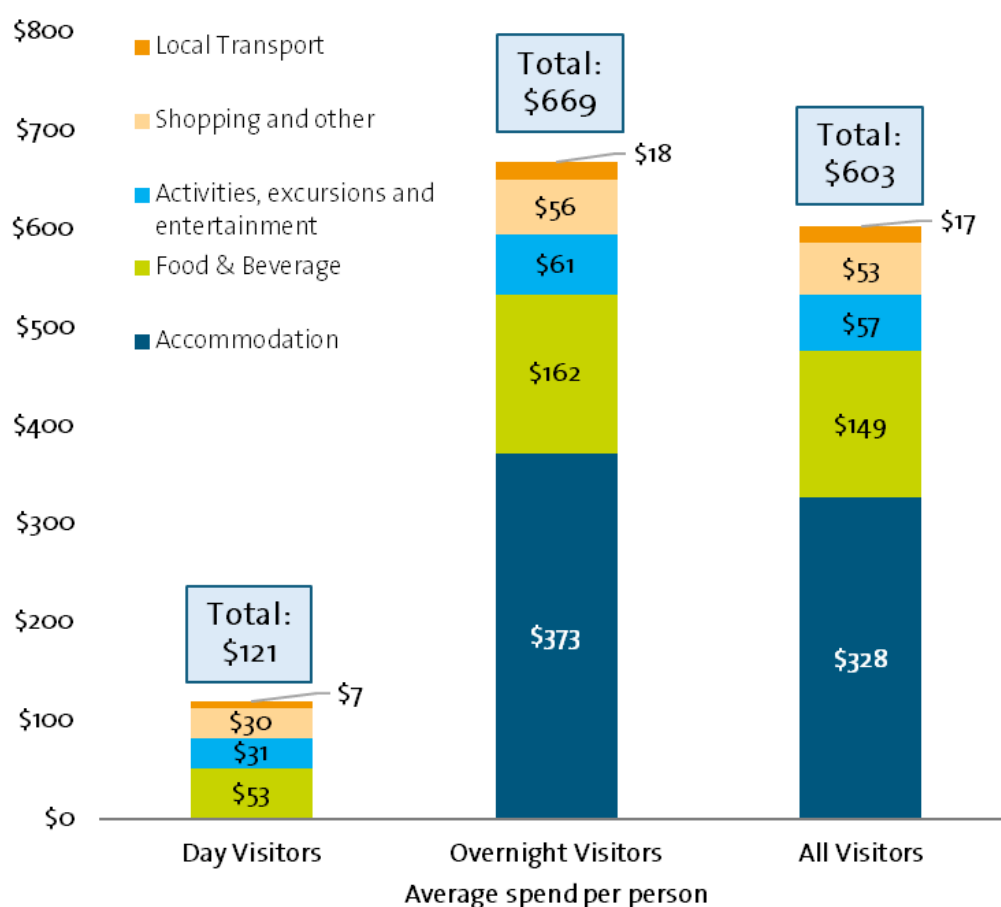
2.3.2 Visitor Spending

This section analyzes the estimated spending impacts of visitors to Tofino. It primarily draws on the spending patterns captured by the visitor intercept survey, which is then applied to the estimated total volume of individual visitors to Tofino.

The 2024 visitor intercept survey found that the average spending was \$1,992 per party, or \$603 per person per trip. Overnight visitors spent more, averaging \$2,190 per party and \$669 per person, while same day visitors spent less, averaging \$402 per party and \$121 per person.

Figure 2-7 below shows the average expenditure per person by category for day visitors, overnight visitors, and all visitors. Overnight visitors spent an average of \$373 per person on accommodation, \$162 per person on food & beverage, and \$61 per person on activities, excursions, and entertainment.

Figure 2-7: Average Spending per Visitor per Trip, by Category, 2024

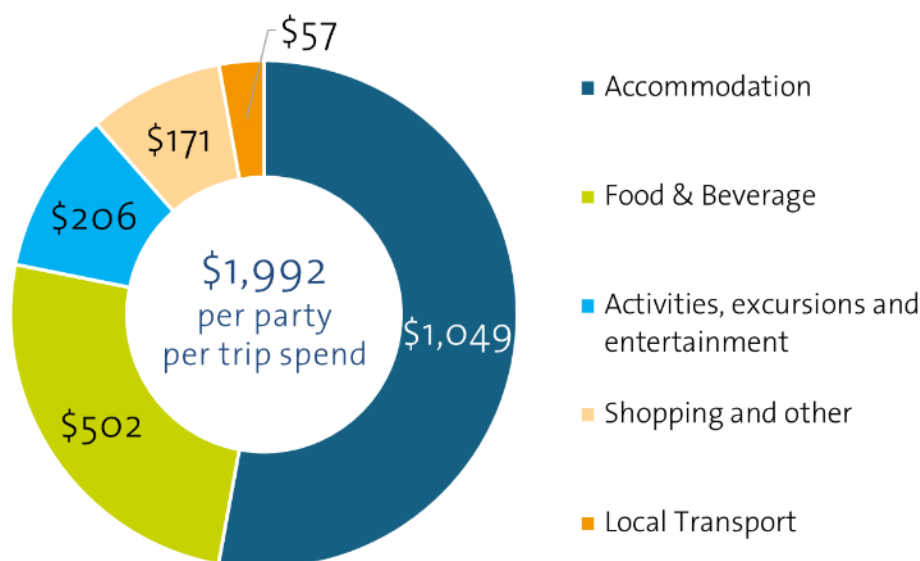


Source: InterVISTAS visitor survey and calculations.

Note: Figures may not sum to totals due to rounding.

Figure 2-8 provides a breakdown of the average spending of all visitor parties across different expenditure categories. Accommodation represented over half of the average party's spending at \$1,049. Food & beverage followed at \$502 per party, while activities, excursions and entertainment averaged \$206 per party. The remaining spending included shopping and other expenses (\$171 on average per party) and local transport (\$57 on average per party).

Figure 2-8: Average Visitor Party Expenditure per Trip, by Category, 2024



Source: InterVISTAS visitor survey and calculations.
Note: Figures may not sum to totals due to rounding.

Total Visitor Spending

The average spending figures for overnight and day visitors to Tofino were used to calculate the total visitor spending and associated economic impacts. Figure 2-9 presents average spending per person and estimated total annual visitor spending by category.

In total, same-day and overnight visitors to Tofino are estimated to spend a total of \$430 million per annum, based on an estimated 78,800 individual day visitors and 632,400 individual overnight visitors to Tofino each year as set out in Section 2. To prevent double counting of expenditure impacts, visitor spending is calculated using individual visitor estimates to Tofino rather than visitor night estimates. Accommodation represents the largest share of spending, totalling approximately \$236 million per annum. Visitors also spend an estimated \$106 million on food & beverage, \$41 million on activities, excursions and entertainment, \$38 million on shopping and other expenditures, and \$12 million on local transportation.

Figure 2-9: Estimated Total Visitor Spending, Day and Overnight Visitors, by Expenditure Category, 2024

Category	Average Spending per Person		Estimated Annual Spending (\$ Millions)		
	Day Visitors	Overnight visitors	Day Visitors	Overnight Visitors	Total
Accommodation	-	\$373	-	\$236	\$236
Food & beverage	\$53	\$162	\$4	\$102	\$106
Activities, excursions and entertainment	\$31	\$61	\$2	\$38	\$41
Shopping and other	\$30	\$56	\$2	\$35	\$38
Local transport	\$7	\$18	\$0.5	\$12	\$12
Total	\$121	\$669	\$9.5	\$423	\$433

Source: InterVISTAS visitor survey and calculations.

Note: Figures may not sum to totals due to rounding.



Source: Tourism Tofino/Kyler Vos

3 Economic Impact of Tourism in Tofino



SUMMARY


In 2024, **direct tourism activity in Tofino** supported:

- \$430 million in total visitor spending
- 3,190 direct jobs
- \$131 million in direct wages
- \$183 million in direct gross domestic product (GDP)
- \$383 million in direct economic output

3.1 Direct Economic Impacts

In 2024, Tofino's tourism industry directly supported 3,190 jobs. These employees, working directly in Tofino's tourism industry, received approximately \$131 million in wages. This averages to about \$41,100 per job, in contrast to the average annual salary of \$69,523 in British Columbia in 2024 and the national average of \$67,096 for that same year.¹⁵

Because employment in the tourism sector is often of a part-time or seasonal nature, average wages or salaries tend to be lower than provincial and national averages. Nevertheless, tourism is a vital industry that supports the presence and growth of other sectors beyond the local market. Tourism can bring tourists and residents together, fostering the expansion and economic progress of various sectors, and offering young individuals low-barrier ways to gain work experience.



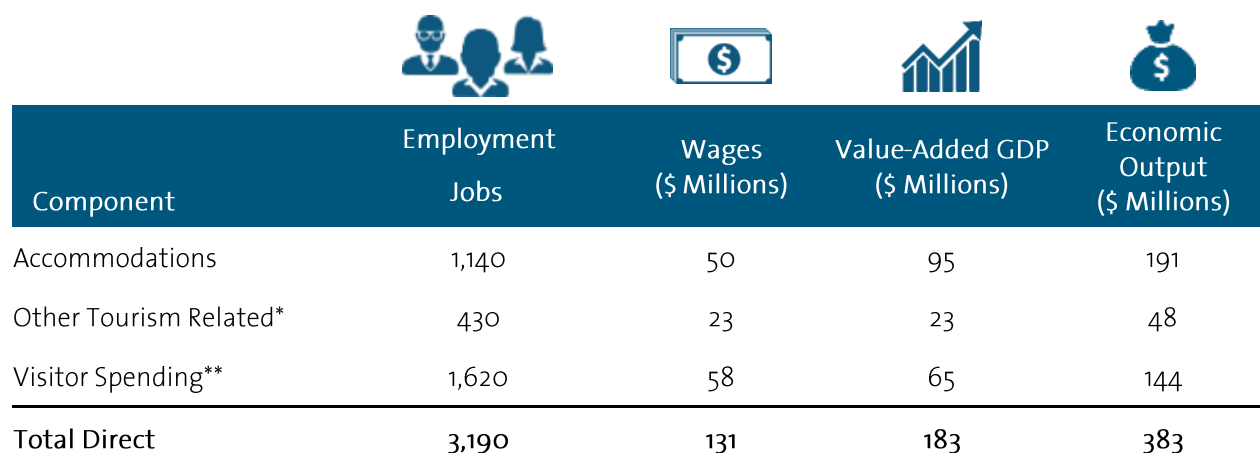
*In 2024, tourism in the Tofino area supported
3,190 direct jobs
and contributed
\$183 million in direct GDP.*

Source: Tourism Tofino/Noel Hendrickson

¹⁵ Statistics Canada. Table 14-10-0064-01 Employee wages by industry, annual. 2024 is the most recent data year at the time of report development. Average weekly wage rate is multiplied by 52 to give a rough estimation of annual salary.

The direct employment from operations in Tofino's tourism industry generated \$183 million in direct GDP and \$383 million in direct economic output in 2024. The summary of the direct economic impact of tourism in the Tofino area is summarized in **Figure 3-1**.

Figure 3-1: Direct Impact of Tofino's Tourism Industry, 2024



Component	Employment Jobs	Wages (\$ Millions)	Value-Added GDP (\$ Millions)	Economic Output (\$ Millions)
Accommodations	1,140	50	95	191
Other Tourism Related*	430	23	23	48
Visitor Spending**	1,620	58	65	144
Total Direct	3,190	131	183	383

Notes:

* Other tourism industries impact reflects employment in activities, attractions, and other supporting businesses and organizations of the tourism sector in the region.

** An estimated 1,620 jobs are associated with visitor spending that takes place in the Tofino area. The level of visitor spending is based on the 2023/2024 visitor intercept survey, and includes expenditures on food/beverage, and retail purchases.

-- Figures may not sum to totals due to rounding.

3.1.1 Direct Employment by Business Type

A breakdown of direct employment related to Tofino's tourism industry by business type provides insight into the different industries that contribute to tourism in Tofino. The following summary details the direct employment of each industry:

- **Food/Beverage** accounted for 1,230 jobs or 39% of direct employment. This includes employment at restaurants, bars, coffee shops, and grocery stores.
- **Accommodations** employment accounted for 1,140 jobs, or 36% of direct employment.
- **Shopping/Retail** accounted for 390 jobs or 12% of direct employment.
- **Outdoor Recreation, Sports & Adventure Tourism** accounted for 340 jobs or 11% of direct employment. These include guided tour operators, outdoor recreation, sports and adventure tourism.

- **Transportation in Tofino** accounted for 30 jobs or 1% of direct employment. This includes taxi, shuttle/car rental, water transportation, and air transportation service providers in Tofino.
- **Other** accounted for 60 jobs or 2% of direct employment.

A breakdown of the total 3,020 direct employees in Tofino's tourism industry by business type is illustrated in Figure 3-2.

Figure 3-2: 2024 Tourism Related Direct Employment in Tofino by Business Type
(Based on 3,020 Direct Jobs of Employment)



Note: Figures may not sum to totals due to rounding.

3.2 Indirect and Induced Economic Impacts

Direct economic impacts created by Tofino's tourism industry and its operations do not adequately capture the full economic contribution of the sector due to other sectors of the economy relying on these employers' businesses. Thus, it is necessary to consider the indirect economic effects of businesses that provide goods

and services to the direct activities associated with Tofino's tourism industry, as well as the induced impacts of direct and indirect employees spending their wages in the general economy. The aggregate sum of direct, indirect, and induced effects provides the total economic impact of Tofino's tourism industry.

The indirect and induced impacts were estimated using Statistics Canada's economic multipliers for the Province of British Columbia.¹⁶

3.2.1 Indirect Impacts

Indirect effects are generated by suppliers to businesses directly involved in or linked to tourism. By applying economic multipliers, it was estimated that in 2024, 740 jobs were indirectly created through industries that support businesses that are directly involved in Tofino's tourism sector. It is estimated that \$49 million in wages is tied to this indirect employment created by tourism in Tofino. The estimated GDP contribution from indirect sources in 2024 is \$84 million, and estimated economic output is \$154 million.

3.2.2 Induced Impacts


Induced employment refers to jobs created as a result of spending in the general economy generated by wages of those directly or indirectly linked to Tofino's tourism industry. In 2024, Tofino's tourism industry is projected to have induced approximately 510 jobs, generating \$31 million in wages. The GDP contribution of these induced jobs is estimated to be \$77 million, and the total economic output of these jobs is an estimated \$120 million.

3.3 Total Economic Impacts

In 2024, operations in Tofino's tourism sector generated a total of 4,440 jobs and \$211 million in wages, including induced and indirect effects. It is estimated that tourism in Tofino contributed to \$345 million in total GDP and \$657 million in total economic output when including multiplier effects in calculations. The direct, indirect, induced, and total impacts of employment and wages in the surrounding regional economy attributable Tofino's tourism industry, along with GDP and economic output contributions, are summarized below in **Figure 3-3**.

¹⁶ The multipliers used for the analysis are based on Statistics Canada economic multipliers for British Columbia from the 2021 Interprovincial Input-Output model, which is recommended by Statistics Canada as it is more reflective of current economic structures. These multipliers were updated with Consumer Price Indices to account for inflation to 2024.

Figure 3-3: Total Economic Impact of Tourism in Tofino, 2024



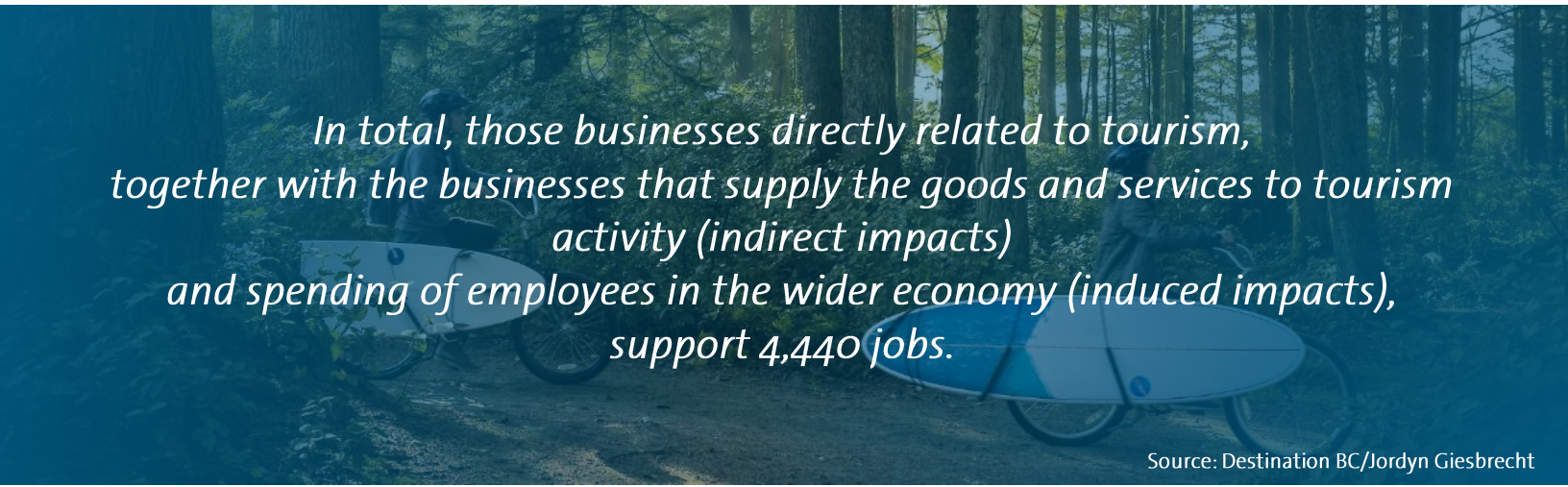
Component	Employment Jobs	Wages (\$ Millions)	Value-Added GDP (\$ Millions)	Economic Output (\$ Millions)
Accommodations	1,140	50	95	191
Other Tourism Related*	430	23	23	48
Visitor Spending**	1,620	58	65	144
Total Direct	3,190	131	183	383
Indirect	740	49	84	154
Induced	510	31	77	120
Grand Total --	4,440	211	345	657

Notes:

* Other tourism industries impact reflects employment in activities, attractions, and other supporting businesses and organizations of the tourism sector in the region.

** An estimated 1,620 jobs are associated with visitor spending that takes place in the Tofino area. The level of visitor spending is based on the 2023/2024 visitor intercept survey, and includes expenditures on food/beverage, and retail purchases.

-- Figures may not sum to totals due to rounding.



In total, those businesses directly related to tourism, together with the businesses that supply the goods and services to tourism activity (indirect impacts) and spending of employees in the wider economy (induced impacts), support 4,440 jobs.

Source: Destination BC/Jordyn Giesbrecht

4 Tax Revenue Impacts



SUMMARY

Contribution to government revenues related to tourism in Tofino amounted to \$102 million in 2024, including:

- Federal Government: \$63 million (61% of total)
- Provincial Government: \$34 million (33% of total)
- Municipal Government: \$6 million (6% of total)

4.1 Introduction

The operations and activities of tourism-related businesses and the spending by visitors to the region yield significant contributions to government revenues. The current tax impacts from operations in Tofino's tourism industry and associated economic activity are also assessed. This includes an estimate of federal, provincial, and municipal government revenue. The tax revenues generated by tourism in Tofino supports public services and infrastructure, enhancing the quality of life for residents and improving facilities for future tourists.

Tax revenue contributions are divided into two groups based on who is making the payment:

- **Taxes paid by employers and employees.** They include wage and payroll taxes, as well as social insurance contributions (such as employment insurance premiums). They also include an estimate of property taxes paid by firms.
- **Taxes paid by same day and overnight visitors to Tofino.** Payments include GST and PST on hotel accommodations and other goods and services (e.g., food/beverage and retail purchases).

As with all such studies, a decision must be made as to how broad of a definition of economic activity should be used in measuring impacts. For this study, a relatively narrow definition has been taken; for example, the following have not been included:

- Taxes associated with indirect or induced employment (i.e., multiplier effects).
- Consumption taxes (e.g., GST and PST) paid by tourism industry employees when they spend their wages.

It would be exceedingly complex to broaden the scope of the tax base in this analysis to include taxes generated by indirect and induced employment. The level of detail collected on direct employment by the survey is critical to the tax analysis, but such information is not available for indirect and induced employment. This being the case, impacts and speculation about the general economy would be complex and averages would not necessarily be precise or accurate. Therefore, the tax analysis in this study is limited to revenues attributable to direct employment only.

4.2 Tax Contributions by Taxpayer

In 2024, tourism related employees and employers contributed a total of \$66 million in government revenues, accounting for 61% of total tax contributions. The remaining 39% of taxation revenues was generated by sales taxes and other local taxes levied on expenditures made by tourists on accommodations, retail, food and beverage, entertainment and local transportation. Total taxes paid by tourists, employers, and employees in Tofino's tourism industry amounted to \$108 million in 2024. The significant contribution of tourism-related tax revenue fosters sustainable economic growth and community well-being while making the destination more attractive and competitive in the global tourism market. **Figure 4-1** provides a summary of 2024 tax contributions by taxpayer.

Figure 4-1: 2024 Tax Contributions of Tourism in Tofino, by Taxpayer (\$ millions)

Taxpayer	Federal	Provincial	Municipal	Total
Tourism Employees and Employers	\$47	\$16	\$3	\$66
Tourists	\$20	\$20	\$3	\$42
Total	\$66	\$36	\$6	\$108

Note: Figures may not sum to totals due to rounding.

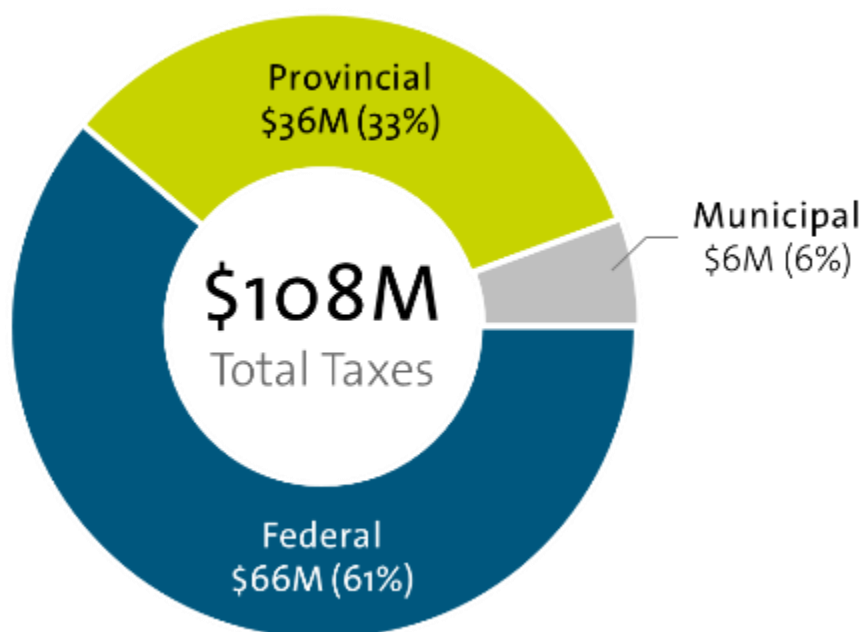
4.3 Tax Contributions by Level of Government

Economic activity by Tofino's tourism industry generates tax revenue for all levels of government. In 2024, Tofino's tourism sector, a vital source of tax revenue for all government levels, generated an estimated \$108 million, supporting public services and infrastructure, enhancing residents' quality of life, and boosting the destination's attractiveness and competitiveness globally. **Figure 4-2** provides a breakdown of tax impacts by level of government.

- The federal government was the largest recipient of tax revenue, receiving approximately \$66 million (61% of total tax revenue impacts). Of this total, most is attributable to taxes paid by employers and employees, such as income tax, corporate income tax, and CPP contributions.

- The provincial government received \$36 million (33% of total tax revenue impacts). This total is from income taxes, WorkSafe BC contributions, medical premiums, and provincial tax associated with visitor spending.
- The municipal government collected the remaining \$6 million in tax revenue (6% of total tax revenue impacts) in the form of property taxes paid by businesses, and the Municipal and Regional District Tax (MRDT).

Figure 4-2: Estimated Tax Revenues of Tofino's Tourism Industry, by Level of Government, 2024




Note: Figures may not sum to totals due to rounding.

5 Summary

In 2024, approximately 711,200 visitors travelled to Tofino, spending approximately \$430 million on accommodations, activities, and entertainment. This influx of tourists supported 3,190 direct jobs, contributing \$183 million to direct GDP. Including businesses that supply goods and services to the tourism sector (indirect impacts) and employee spending in the broader economy (induced impacts), tourism supported a total of 4,440 jobs and contributed \$345 million in total GDP. Additionally, tourism significantly contributes to tax revenues which benefit public services and infrastructure. In 2024, visitors, employers, and employees in Tofino's tourism industry contributed \$108 million in taxes, benefitting federal, provincial, and municipal governments.

Figure 5-1: Total Economic Impact of Tourism in Tofino, 2024



Component	Employment Jobs	Wages (\$ Millions)	Value-Added GDP (\$ Millions)	Economic Output (\$ Millions)
Accommodations	1,140	50	95	191
Other Tourism Related*	430	23	23	48
Visitor Spending**	1,620	58	65	144
Total Direct	3,190	131	183	383
Indirect	740	49	84	154
Induced	510	31	77	120
Grand Total --	4,440	211	345	657

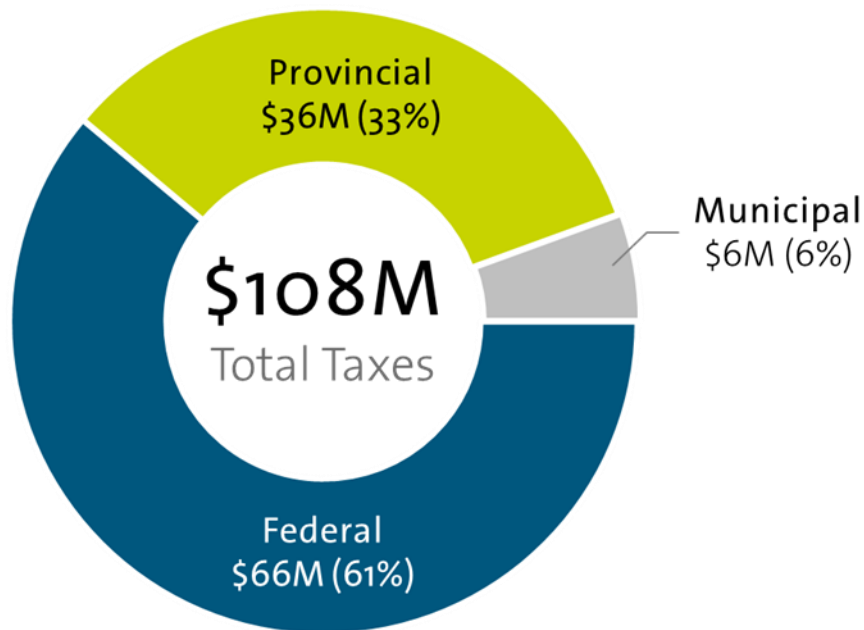
Notes:

* Other tourism industries impact reflects employment in attractions, and other supporting businesses and organizations of the tourism sector in the region.

** An estimated 1,620 jobs are associated with visitor spending that takes place in the Tofino area. The level of visitor spending is based on the 2023/2024 Visitor Intercept Survey conducted by InterVISTAS, and includes expenditure on retail, food & beverage, and local ground transportation.

-- Figures may not sum to totals due to rounding.

Figure 5-2: Estimated Tax Revenues of Tofino's Tourism Industry, by Level of Government, 2024



Note: Figures may not sum to totals due to rounding.

In summary, tourism is a vital driver of economic growth and development in Tofino, significantly supporting local employment and contributing to the regional economy. This significant contribution fosters sustainable economic growth and community well-being, making Tofino a more appealing and competitive destination in the global tourism market.



Source: Tourism Tofino/Kyler Vos

Appendix A: Visitor Volume Estimates

Visitor Volume to Tofino

InterVISTAS estimated the total number of individual visitors to Tofino based on findings from the visitor intercept survey, data from accommodations providers and average monthly occupancy rates. Estimating the total individual visitor volume to Tofino was carried out in several steps, as outlined below.

1 – Validating accommodation provider database

The capacity of each known accommodation provider was determined in terms of a number of rentable units and number of bedrooms/sites available, based on responses from the employment survey and publicly available data. The resulting database served as the foundation for estimating the total visitor volume to Tofino.

The database records 300 accommodation providers in Tofino, with a total capacity of 1,890 rentable units and an estimated 2,550 bedrooms/sites. This includes the following types of paid accommodation:

- Bed & Breakfast
- Campground / RV Park
- Hostel
- Hotel / Motel / Resort / Lodge / Inn
- Short Term Rental

2 – Calculating the maximum theoretical capacity of accommodation providers

The initial step in estimating visitor volume involves calculating each accommodation provider's maximum monthly theoretical capacity. The next stage involves adjusting these figures to account for average lengths of stay and seasonal occupancy levels. Thus, the maximum monthly theoretical capacity is determined based on the recorded number of bedrooms, campsites, or units along with the expected occupancy for each accommodation type. These assumptions are detailed in **Table A-1**.

Table A-1: Accommodation Maximum Theoretical Capacity Assumptions, 2024

Accommodation Type	Occupancy Level*
Bed & Breakfast	2 people per bedroom
Campground / RV park	4.1 people per campsite
Hostel	2.6 people per bedroom
Hotel / Motel / Resort / Lodge / Inn	2.9 people per bedroom
Short Term Rental	3.9 people per unit

Source: InterVISTAS visitor survey and calculations.

* Derived from the visitor intercept survey responses on average party size staying at each accommodation type.

The maximum theoretical capacity of each accommodation provider is calculated on a monthly basis so that accurate seasonality changes can be made. It assumes that unique visitors stay in each available bed / bedroom / campsite / unit every night of the month. For example, the maximum theoretical capacity of a hostel with 100 beds in July is calculated as follows:

1 person per bedroom x 100 bedrooms x 31 days = 3,100 maximum theoretical capacity in July

3 – Adjustment for average lengths of stay

After calculating the maximum theoretical capacity of each accommodation provider, adjustments are made to account for the average number of nights visitors stay. To account for seasonal change, this is calculated drawing upon information from the visitor intercept survey on average lengths of stay for each accommodation type for every calendar month.¹⁷

Average lengths of stay vary across the different accommodation types and the calendar year. They range from 1.8 nights in January for visitors staying in hotels / motels / resorts / lodges / inns to 3.7 nights in August for visitors staying in short term rentals, provided by the visitor intercept survey. The average length of stay data was used to calculate the maximum number of visitors that could stay at each accommodation provider. This assumes that each bed / bedroom / campsite / unit was filled every night by visitors staying for the average number of days in each accommodation type. For example, the occupancy of a hostel with 100 beds in July is calculated as follows:

3,100 maximum theoretical capacity in July / 2.8 average no. of nights stayed in hostels = 1,107 unique visitors staying for the average number of nights

¹⁷ Details are provided in **Appendix B**.

4 – Adjustment for monthly accommodation occupancy levels

Data from AirDNA and STR provided by Tourism Tofino was utilized to adjust individual visitor volumes according to monthly accommodation occupancy levels. This information was primarily derived. The data was used to further adjust the number of individual visitors estimated at each accommodation provider to account for less than 100% occupancy levels. **Table A-2** summarizes the monthly occupancy levels for each type of accommodation.

Table A-2: Monthly Occupancy Level by Accommodation Type, 2024

Month	Hotels / Motels / Resorts / Lodges / Inns	Short Term Rental	Bed & Breakfasts, Campgrounds & RV Parks, Hostels
January	28%	33%	31%
February	51%	52%	51%
March	60%	61%	61%
April	61%	56%	59%
May	70%	78%	74%
June	73%	82%	77%
July	87%	92%	89%
August	93%	95%	94%
September	82%	84%	83%
October	67%	62%	64%
November	56%	49%	53%
December	35%	43%	39%

Source: AirDNA data and STR Report provided by Tourism Tofino.

For the example of a 10-bedroom hostel with 868 unique visitors staying in July, the number of visitors is reduced to 89% reflecting that an average of 11% of bedrooms are unoccupied, totalling 773 unique visitors. This was the final step in estimating the total volume of visitors staying in Tofino in paid accommodation, which is summarized in **Table A-3**.

Table A-3: Estimated Total Annual Visitor Volume to Paid Accommodation, 2024

Accommodation Category	Total Annual Individual Visitor Volume
Hotel / Motel / Resort / Lodge / Inn	384,100
Campground / RV Park	101,000
Short Term Rental	75,100
Hostel	2,900
Bed & Breakfast	8,700
Total	571,800

Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey.

Note: Figures may not sum to totals due to rounding.

5 – Calculating volumes of day visitors and visitors staying in unpaid accommodation

Day visitors and those staying in alternative accommodations were estimated based on their representation in the visitor intercept survey and then weighted against the total volume of visitors staying in paid accommodation categories, as demonstrated in **Table A-3**.

Table A-4 summarizes the representation of day visitors and the representation of day visitors and those staying in alternative accommodations based on the weighted party size from the visitor intercept survey and the estimated total annual visitor volume.

Table A-4: Estimated Total Annual Volume of Day visitors and Visitors Staying in Non-Paid Accommodation, 2024

Visitor Type	% Responses by Party Size	Estimated Total Annual Visitor Volume
Day Visitors	11.1%	78,800
Home of a Friend or Family Member	3.7%	26,600
Non-paying Campers	26.3% (of visitors staying in paid campgrounds / RV parks)	26,600
Other Accommodation	0.6%	4,400
Second Home	0.4%	3,100
Total Non-Paid Accommodation and Day Visitors		139,400

Source: Visitor volumes are estimated based on data from accommodations providers, average monthly occupancy rates, and visitor profiles from the intercept survey.

Note: Figures may not sum to totals due to rounding.

Limitations

Tofino's total annual individual visitor volume estimate is based on a range of data sources from different time periods and survey methodologies. While significant efforts have been made to validate the data and assumptions underlying the visitor volume model, there are several areas where future estimates could be enhanced.

1. The model draws upon data sources conducted in different periods based on data availability. The recent InterVISTAS intercept survey was conducted from October 2023 to September 2024. Additionally, information from Tourism Tofino and AirDNA on occupancy levels for different accommodation types draws upon 2023 and 2024 data to provide a full calendar year. Therefore, the model should be considered the best available estimate of individual visitor volume to Tofino, drawing upon the most recent information sources to consider seasonality patterns.
2. Analyzing the accommodation database involved extensive data cleaning and validating from multiple information sources to ensure that all known cases of double counting were removed from the database. This included information from Tourism Tofino and District of Tofino. In most cases, double counting arises when vacation rental properties are listed on multiple platforms, including independent websites, local Tofino companies that advertise multiple accommodation providers' properties and Airbnb. While considerable effort has been made to remove double counting and develop a comprehensive database of available accommodation in Tofino, the actual number of accommodation providers, and thus the capacity for visitors, may be higher or lower.
3. Because occupancy data for campgrounds, RV parks, bed & breakfasts, and hostels was unavailable, proxy information from Tourism Tofino's STR data was used. However, the occupancy levels for these types of accommodations are expected to differ from hotel occupancy levels (particularly for campgrounds and RV parks during winter), and there is currently no data available to estimate these differences.
4. Estimations of day visitors and other visitors staying in non-paid accommodations follow the same seasonal trends as visitors in paid accommodations because the basis for the model first estimates visitors in paid accommodations and then utilizes their weighting in the intercept survey to estimate other visitors.
5. The capacity of accommodation providers is largely determined by the visitor intercept survey and average party sizes for those staying at campgrounds, RV parks, and vacation rental homes or condos.

Appendix B:

Tofino's Visitor Profile and Behaviour

The visitor profile presents the demographics, decisions and behaviours of visitors to Tofino, which was generated by the visitor intercept survey conducted from October 16, 2023, to September 21, 2024. A total of 3,047 intercept surveys were considered for the analysis, though response rates to specific questions varied based on relevance and visitor responsiveness.

This appendix provides an analysis of visitor characteristics, covering aspects such as party size and composition as well as demographic details including age, gender, occupation, and annual income. The survey also explored the origins of visitors, their travel choices to Vancouver Island and Tofino, and the purpose of their travel. Additionally, the section examines accommodation choices, length of stay, and average trip length. Visitor engagement with local activities and attractions, along with an assessment of their satisfaction levels is assessed, including an evaluation of the Net Promoter Score. Lastly, key insights from the visitor survey are summarized.

Visitor Profile

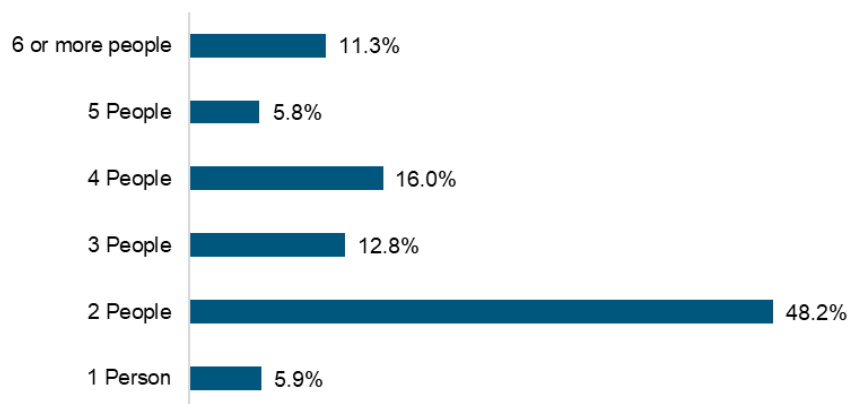
This section analyses the characteristics of visitors, focusing on the size and composition of visiting groups, as well as their demographic profile. Although this overview includes insights into visitor occupations and income levels, an examination of their spending patterns is presented in [Section 2.3](#).

Party Size and Composition

The average party size was 3.4 people, with a median of two people. Nearly half of visitors (48.2%) were in a party of two people, which can be largely attributed to the high proportion of respondents travelling with their spouse/partner (51.8%). [Figure B-1](#) summarises the party size of visitors.

Average
Party Size
3.4

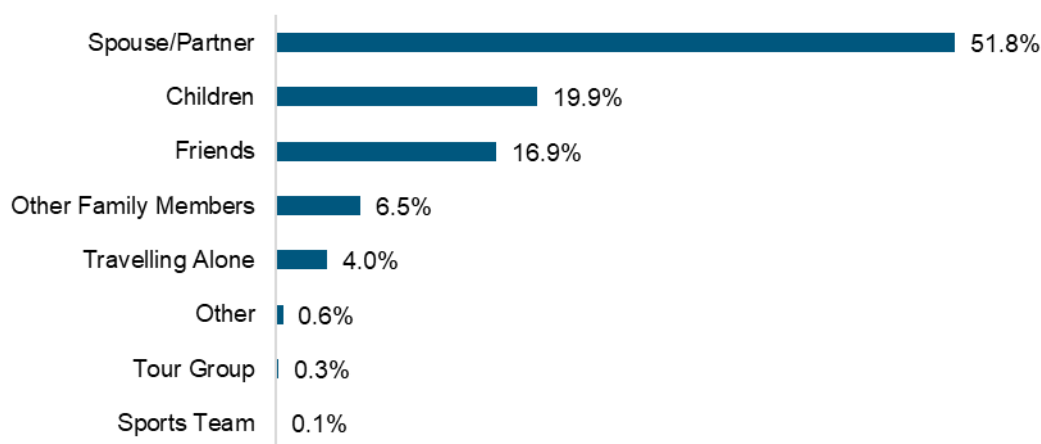
Figure B-1: Visitor Party Size



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Figure B-2 presents the composition of visitor parties. Since respondents could select multiple options to reflect all their travel companions, the percentages do not total 100%. Tofino attracts a high number of couples and family groups, including those travelling with spouses, children, or other relatives. Just over half of visitors (52%) travelled with their spouse or partner, while a fifth of travelled with children (19.9%). Only a small fraction of respondents (0.3%) reported travelling as part of a tour group.

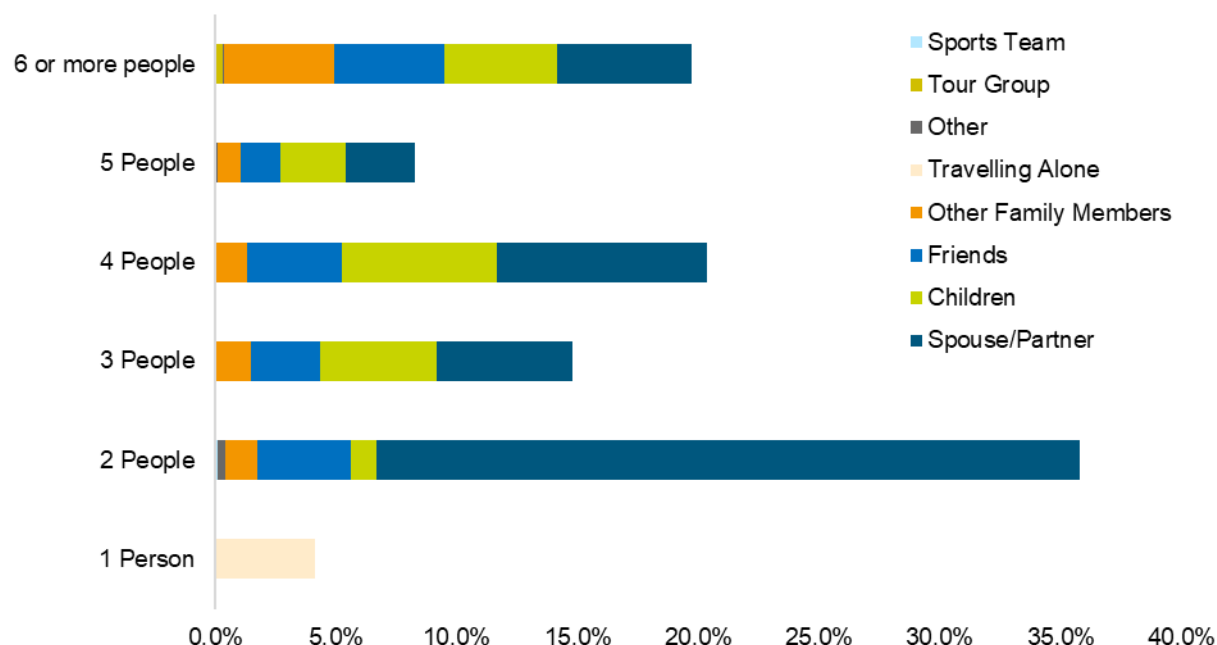
Figure B-2: Visitor Party Composition



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Figure B-3 illustrates that most two-person visitor groups consisted of a respondent and their spouse/partner (29.1%). Similarly, four-person groups were most commonly composed of respondents with their spouse/partner and children. Among those travelling with friends, the highest proportion was in groups of six or more (4.7%).

Figure B-3: Party Size by Composition



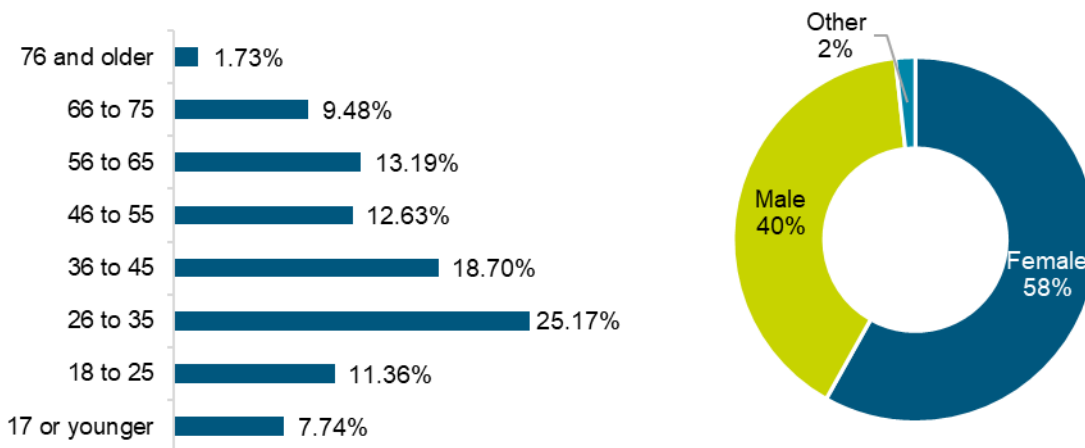
Source: InterVISTAS visitor survey and calculations.

Age and Gender

The average age of visitors was 38, with a median age of 36. **Figure B-4** shows the age distribution of visitors along with the gender of respondents. A quarter of visitors (25%) were between 26 and 35 years old, while just under a third fell within the 36 to 55 age range. Nearly one-fifth were 25 or younger.

Approximately 58% of survey respondents were female, while 40% were male, with the balance identifying as neither or preferring not to say, compared to the 2018 survey where 53.8% respondents were male, 45.6% respondents were female, and 0.6% responded other.

Figure B-4: Age of Visitors and Gender of Survey Respondents

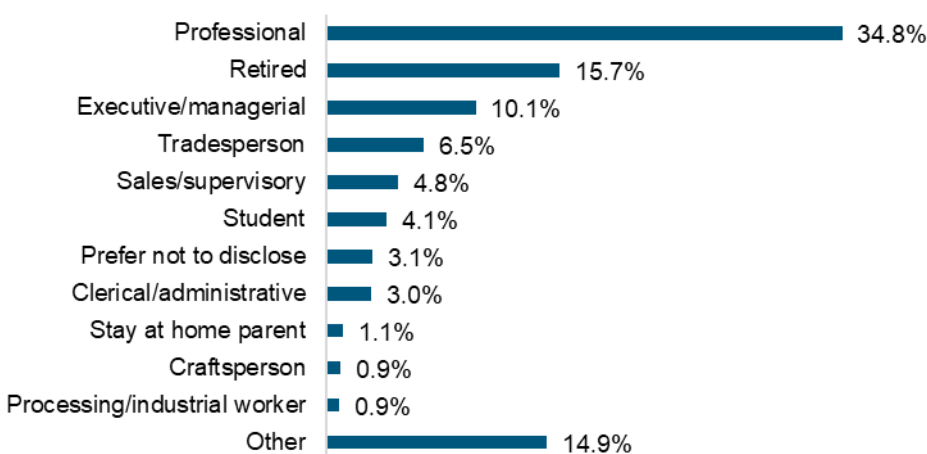


Source: InterVISTAS visitor survey and calculations. Note that gender is based upon the answers of respondents and not all visitors. Totals may not sum due to rounding.

Occupation and Wages

Figure B-5 provides a summary of respondent occupations. More than a third held professional roles, while a quarter were either in executive or managerial positions (10.1%) or retired (15.7%). It is important to note that these figures are calculated from the 72.7% of respondents who answered this question and do not represent all visitor responses.

Figure B-5: Occupations of Respondents

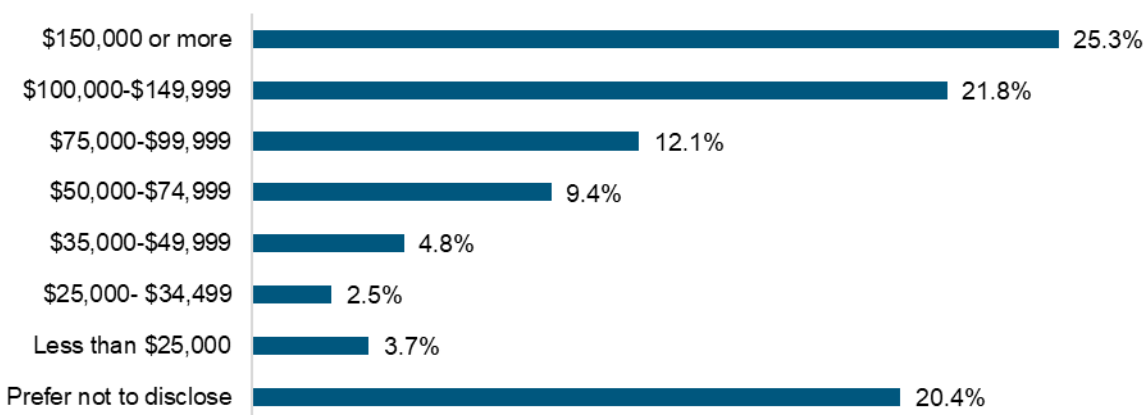


Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Figure B-6 presents the wage categories reported by respondents. This data does not include the wages of other members in their travel parties, and 20.4% of respondents chose not to disclose their annual income.

The most reported wage category was \$150,000 or more, accounting for 25.3% of respondents. This is a significant increase compared to the 2018 survey where just 13.4% of respondents fell into this category. Additionally, one-third of respondents reported annual wages between \$75,000 and \$149,999. In comparison, 3.7% of respondents reported earning less than \$25,000. This is likely due to the number of students this survey captures in addition to a small representation of retirees.

Figure B-6: Wage of respondent



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

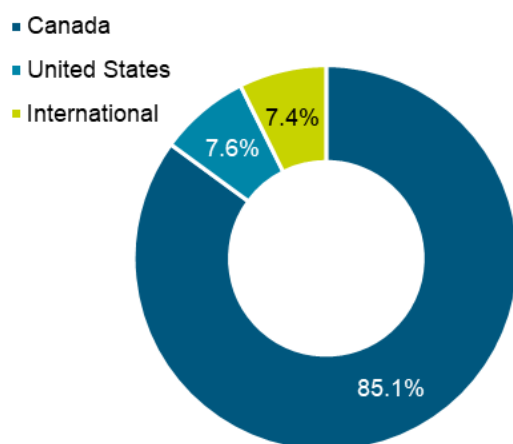
Visitor Origin and Travel to Tofino

This section summarizes the origins of visitors to Tofino and their transportation choices made to get to Vancouver Island and Tofino.

Origin

The vast majority of Tofino's visitors are from Canada (85%), while from the United States and other international destinations represent 7.6% and 7.4% respectively. This marks a decrease from the 2018 survey of 8.8% and 18.2%, for these groups, as illustrated in Figure B-7.

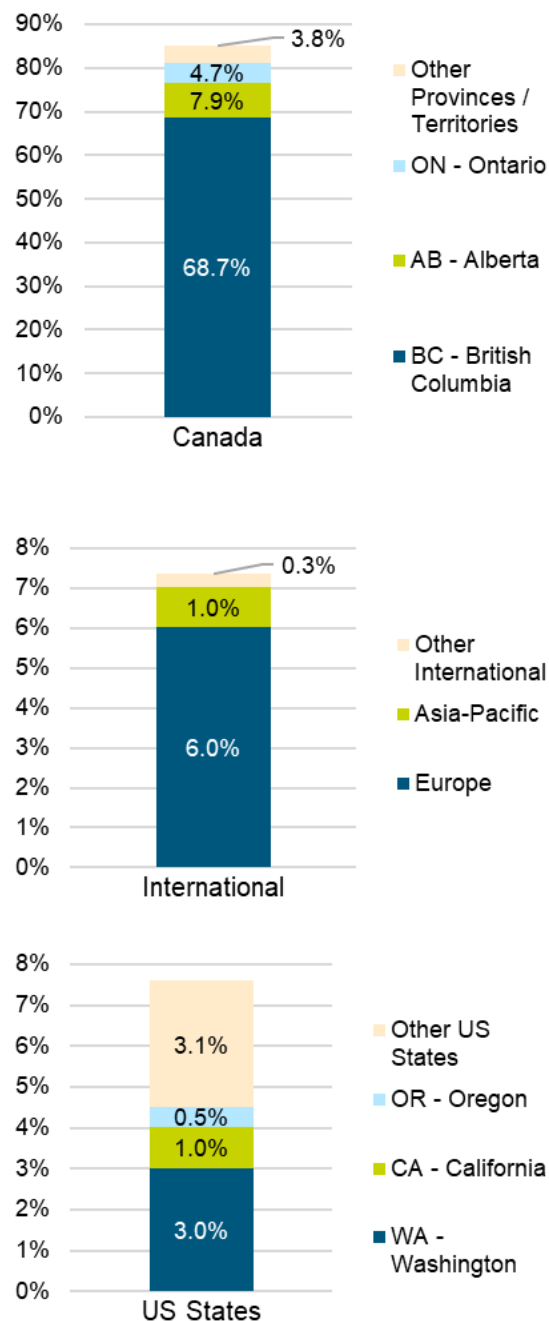
Figure B-7: Origin of visitors



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Figure B-8 outlines the origins of visitors from Canada, the U.S. and international countries to Tofino. Over two-thirds of visitors to Tofino are from British Columbia (68.7%), with Alberta and Ontario as the second and third highest sources of visitors at 7.9% and 4.7% respectively. Visitors from other Canadian provinces and territories comprised 3.8% of the total. Among U.S. visitors, the largest proportion of visitors

Figure B-8: Origin of Canadian, International and American visitors



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

arrived from Washington at 3%, followed by California at 1% and Oregon at 0.5%. Visitors from all other U.S. states accounted for 3.1% of U.S. respondents.

An estimated 7.4% of surveyed visitors originated from other international countries. Most of these visitors were from Europe, contributing 6% of all visitors to Tofino. The Asia-Pacific region was the next largest, accounting for 1%, with Australia representing 64% of that total, or 0.6% of all visitors. Excluding Canada and the U.S., **Table B-1** shows that the United Kingdom had the largest share of international visitors, making up 2.3% of respondents, followed by Germany and Australia at 1.4% and 0.6%, respectively.

Table B-1: Country and region of origin of international visitors

Country / Region	%
United Kingdom	2.3%
Germany	1.4%
Australia	0.6%
France	0.5%
Switzerland	0.4%
Other Europe*	1.4%
Other Asia-Pacific**	0.4%
Other International	0.3%

Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

* Other Europe excludes United Kingdom, Germany, France and Switzerland

** Other Asia-Pacific excludes Australia

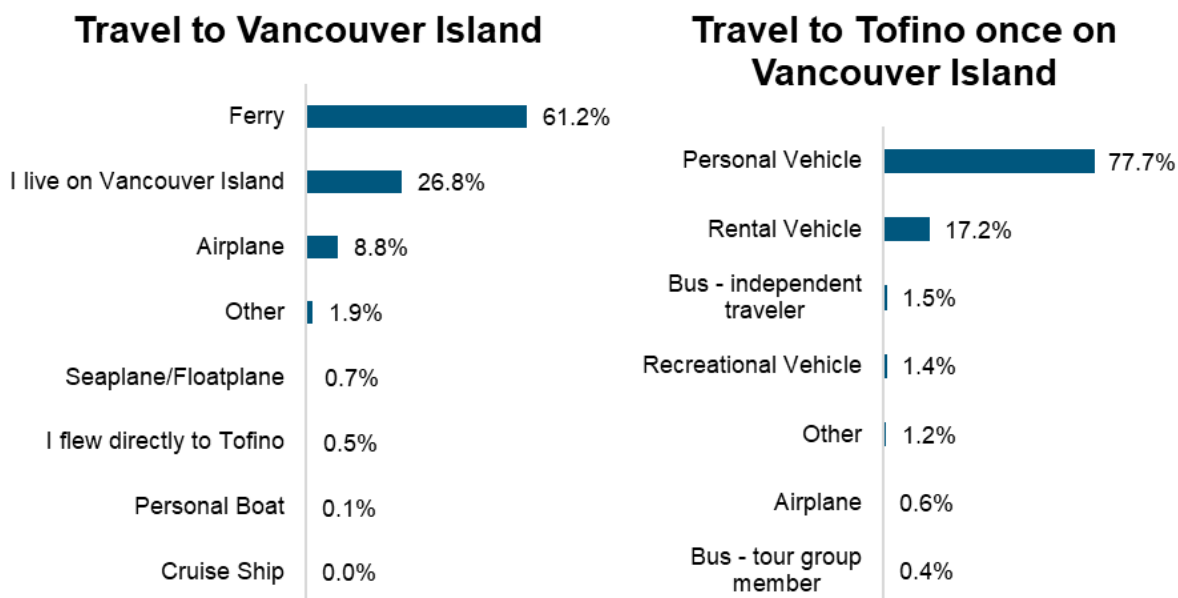
Travel to Vancouver Island and Tofino

Figure B-9 illustrates the travel choices of visitors to both Vancouver Island and on to Tofino once they are on Vancouver Island. Of surveyed visitors, 61.2% reached Vancouver Island by ferry, and more than a quarter already reside on Vancouver Island¹⁸ (26.8%). A combined total of 10% of visitors travelled to Vancouver Island by airplane (8.8%), seaplane/floatplane (0.7%), or flew directly to Tofino (0.5%).

Once on Vancouver Island, nearly four-fifths of visitors (77.7%) travelled to Tofino by personal vehicle. This is a significant increase compared to the proportions reported in the 2018 survey (59.8%). 17.2% of visitors used rental cars to reach Tofino, which is lower than the figures from the 2018 surveys (24.6%). Only 1.5% of visitors travelled independently by bus, a notable decrease from the 8.3% recorded in the 2018 survey.

¹⁸ The majority of visitors that already live on Vancouver Island were more likely to travel to Tofino using a personal vehicle (95.8%) than visitors travelling from elsewhere.

Figure B-9: Travel to Vancouver Island and to Tofino

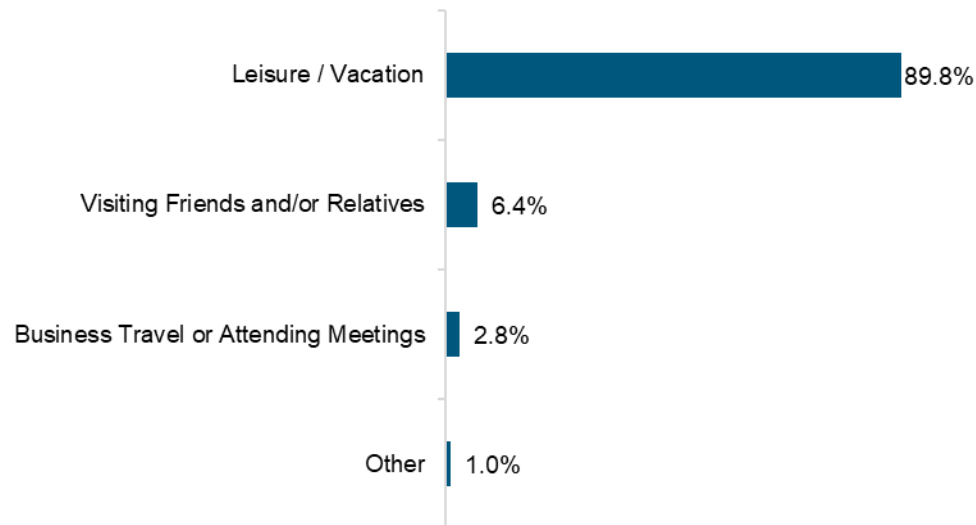


Purpose of Visit

Figure B-10 indicates that the majority of visitors to Tofino came for leisure or vacation, accounting for nearly 90% of respondents. Only 6.4% cited visiting friends and/or relatives as the main reason for their trip, and 2.8% travelled for business or meetings.

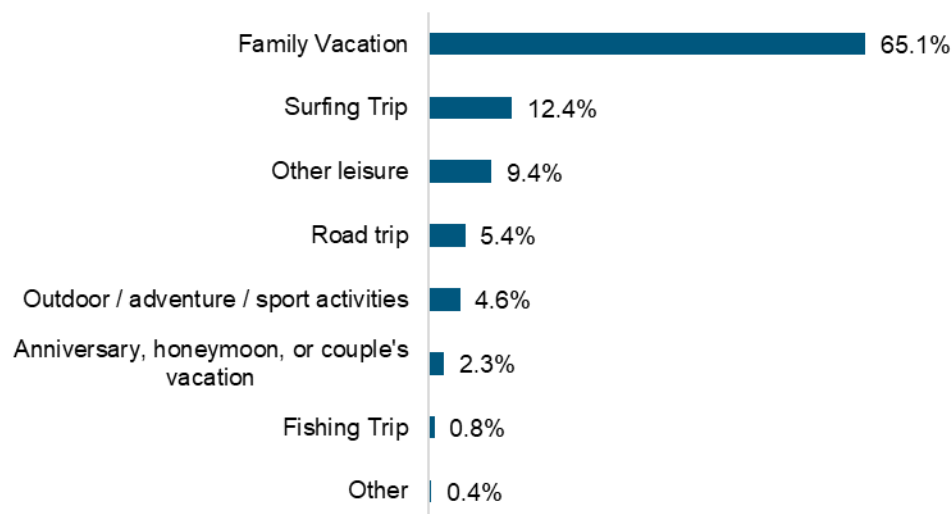
When asked about their top reasons for visiting Tofino, Figure B-11 reveals that nearly two-thirds of visitors (65.1%) came for family vacations. More than a tenth of visitors (12.4%) stated surfing as the top reason for their trip, while 9.4% came for other leisure activities. Other reasons for visiting Tofino predominantly included road trips, outdoor/adventure/sporting activities, anniversaries, honeymoons or couple's vacations or fishing trips.

Figure B-10: Main Purpose of the Trip



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Figure B-11: Top Reasons for Visiting Tofino on this Trip



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Length of Stay and Accommodation Choices

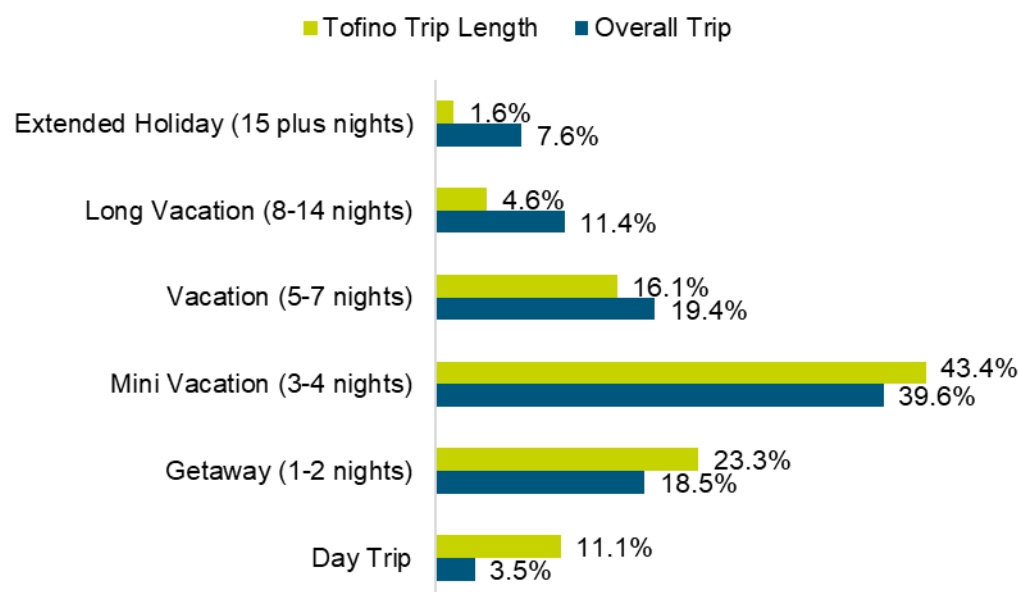
This section summarises the length of visitors' stays in Tofino and their accommodation choices. Of the visitors to Tofino, 78.6% stayed in Tofino, while the remaining 21.4% were divided between Ucluelet (14.8%) and the National Park (2.4%).

Length of Stay

The median overall trip length reported by visitors was 4 nights, while the average was higher at 7.3 nights due to a segment of respondents who took significantly longer trips. This is lower compared to the 2018 survey, which recorded an average trip length of 11 nights. The average number of nights visitors spent in Tofino was 4.2. This is consistent with the post-COVID-19 pandemic trend that trip length is decreasing, as many travellers are opting to take more trips to explore more destinations.

In total, 11.1% of visitors to Tofino were on day trips, with 3.5% reporting a day trip as their overall trip length. **Figure B-12** shows that 43.4% of visitors took mini-vacations of three to four nights, a significant increase from 27.5% in the 2018 survey. Mini vacations of three to four nights were also the most common overall trip length, reported by 39.6% of visitors. Significantly fewer visitors stayed for 15 or more nights in Tofino (1.6%), and about one-sixth of visitors (16.1%) stayed for five to seven nights, compared to 19.4% of visitors with the same overall trip length. Trips of four nights or less made up 77.7% of the total stay length reported by visitors, which accounted for just 61.6% of overall trip lengths.

Figure B-12: Overall Trip Length & Length of Stay in Tofino

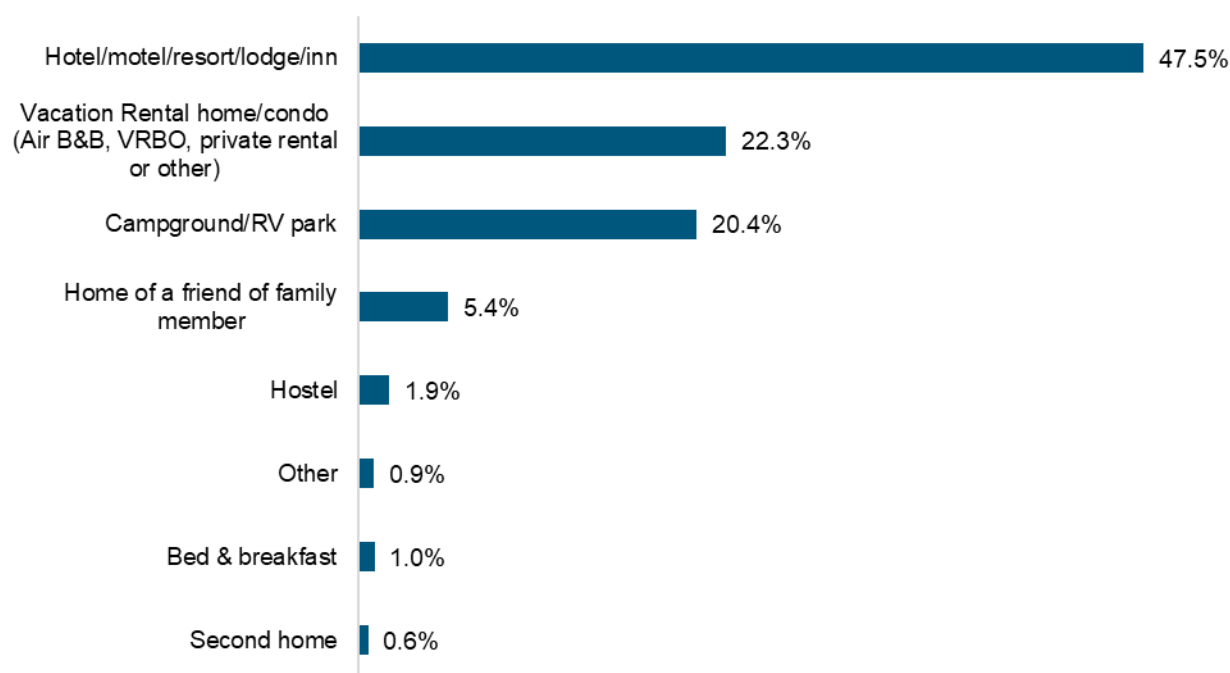


Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Accommodation Choice

Figure B-13 shows the accommodation choices of visitors. Nearly half of the visitors (47.5%) stayed in hotels, motels, resorts, lodges, or inns, which is a significant increase from the 2018 survey, which reported 34.4% of visitors staying in these accommodations. More than one-fifth (22.3%) chose vacation rental homes or condos, including Airbnb accommodations, which is similar to the proportion of visitors who camped or stayed in RV parks (20.4%)¹⁹. A smaller percentage (5.4%) stayed in the homes of friends or family. Together, fewer than 5% of visitors stayed in hostels (1.9%), bed and breakfasts (1%), second homes (0.6%), or other types of accommodation (0.9%).

Figure B-13: Accommodation Choice

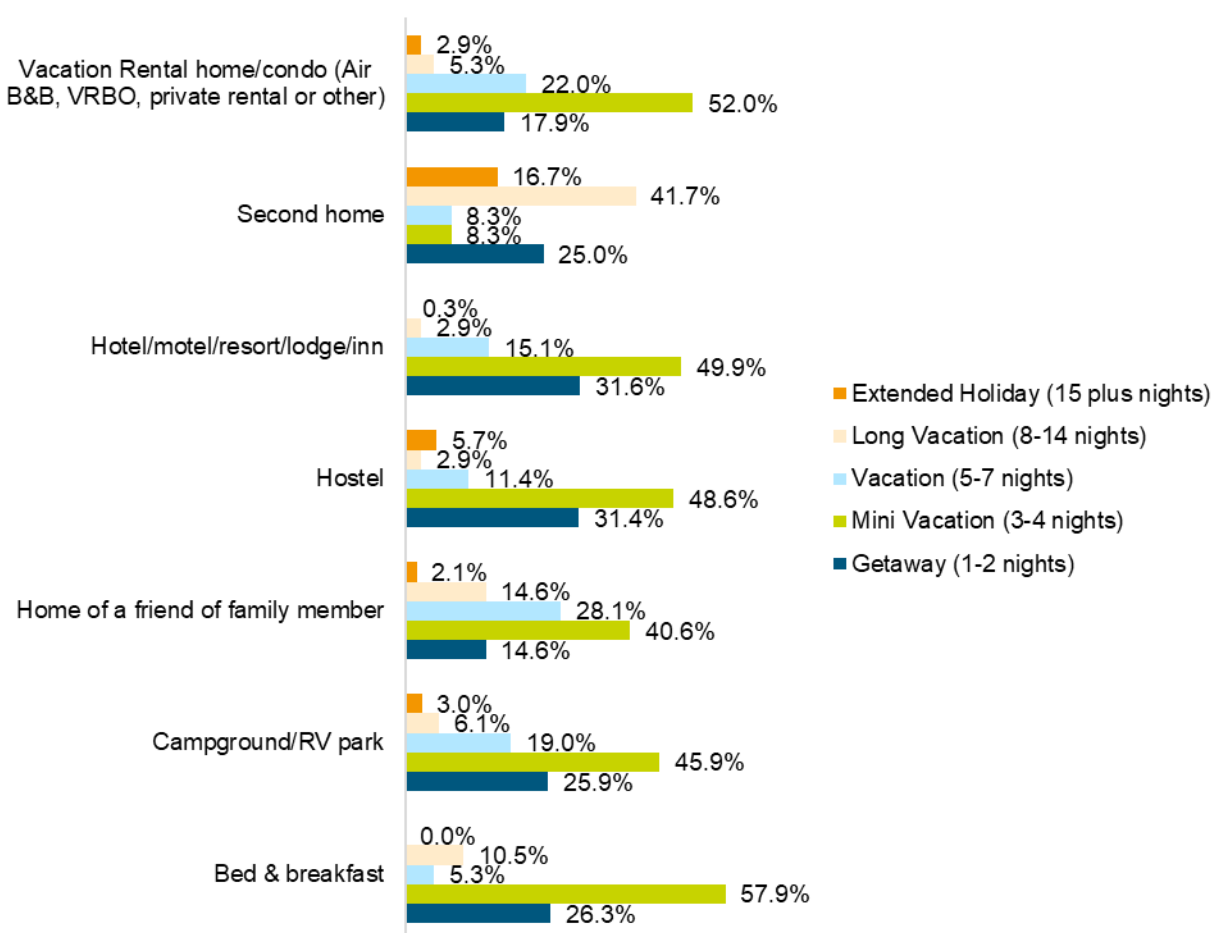


Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

¹⁹ Of the surveyed visitors staying in campgrounds / RV parks, 21% reported they did not spend any money on accommodation but reported expenditure on other categories such as food and beverage and visiting attractions.

Figure B-14 illustrates accommodation choices and the length of visitors' stays in Tofino. Note that stay lengths for visitors using 'other' accommodations have been excluded due to low response rates. Bed & breakfasts and hostels were primarily chosen for shorter stays, while vacation rental homes and condos were preferred for longer stays of five or more nights. Significantly fewer visitors stayed in campgrounds and RV parks than in other accommodations types for trips longer than seven nights. However, 19% of visitors stayed at campgrounds or RV parks for vacations lasting five to seven nights. In comparison to hotels, motels, resorts, lodges, and inns, vacation rental homes and condos were preferred for longer stays, especially for long vacations lasting 8 to 14 nights and extended stays of 15 or more nights.

Figure B-14: Length of stay in Tofino, by accommodation choice



Source: InterVISTAS visitor survey and calculations. Note: responses from visitors staying in other accommodation have been excluded from the analysis of length of stay due to low response rates. Totals may not sum due to rounding.

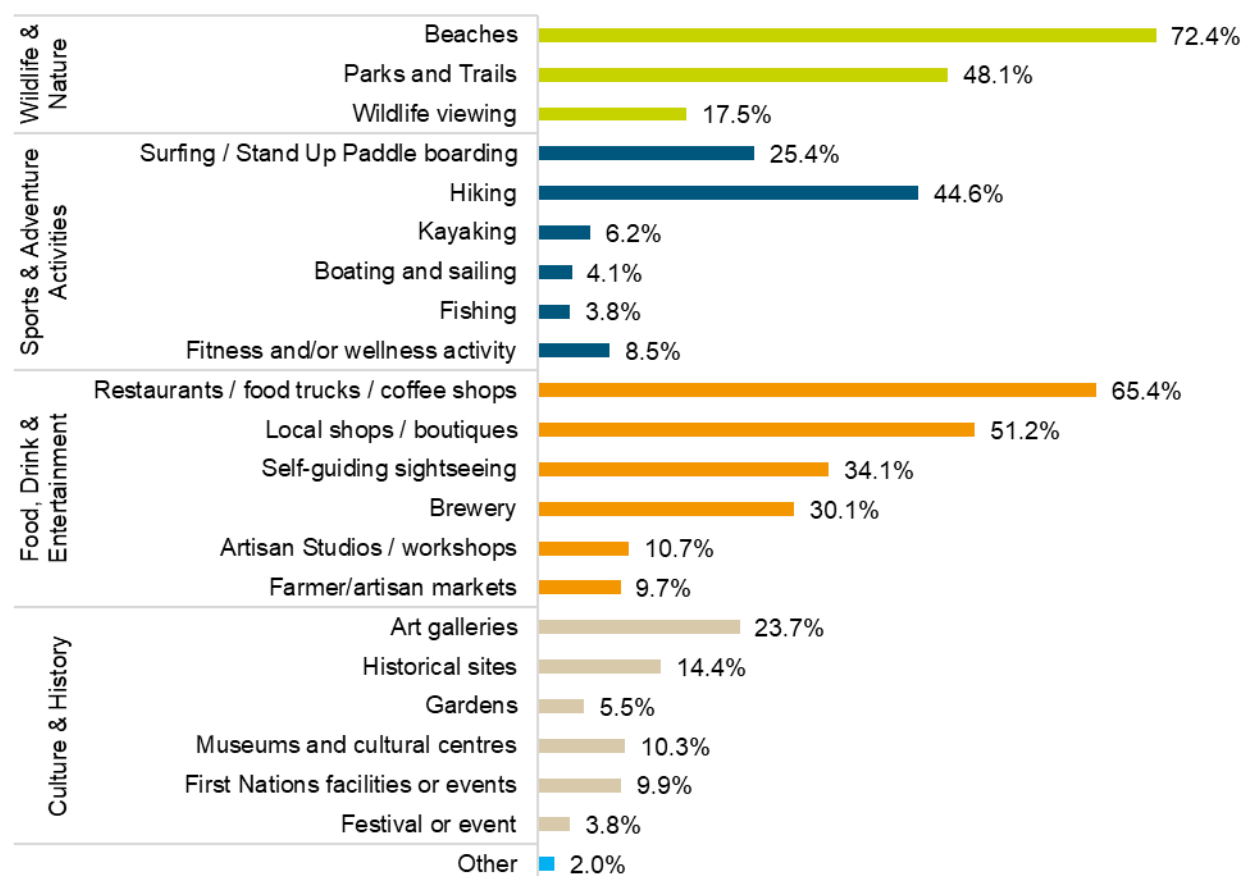
Participation in Activities and Attractions

Figure B-15 below outlines the participation of visitors in various activities and attractions during their stay in Tofino. These activities have been grouped into four broad categories: ‘culture & history’, ‘food, drink & entertainment’, ‘sports and adventure activities’, and ‘wildlife & nature’. While the survey demonstrated the types of activities visitors engaged in, it did not specify particular venues or businesses unless mentioned by respondents. For instance, visitors who participated in ‘wildlife viewing’ were not differentiated between those who paid for commercial tours and those who engaged in self-guided activities. Notably, 301 respondents indicated they had or would visit First Nations facilities or events, but no qualitative commentary on specific venues was provided.

In terms of activities, Tofino’s natural beauty and its reputation as a surfing destination are reflected in the responses: 72.4% of visitors mentioned they had or would spend time enjoying the beaches, while 48.1% planned to visit Tofino’s parks and trails. Nearly a tenth (17.5%) of visitors intended to participate in wildlife viewing activities.

Surfing and stand-up paddleboarding were popular activities for a quarter of the visitors (25.4%), while 44.6% stated they would go hiking. Combined, more than a fifth of visitors planned to kayak (6.2%), participate in boating and sailing (4.1%), fish (3.8%), and engage in fitness and wellness activities (8.5%).

Figure B-15: Visitor participation in activities and attractions



Source: InterVISTAS visitor survey and calculations.

Nearly two-thirds of visitors to Tofino indicated that they would visit restaurants, food trucks, and coffee shops during their stay (65.4%), around a third planned to visit the brewery (30.1%), and about one-tenth intended to visit farmers markets (9.7%). Additionally, more than a third of visitors expressed interest in self-guided sightseeing in Tofino (34.1%), while 10.7% planned to explore artisan studios and workshops.

Over a fifth of visitors (23.7%) planned to visit art galleries, and more than one-tenth intended to visit historical sites (14.4%). Fewer visitors expressed interest in visiting gardens (5.5%), museums and cultural centres (10.3%), First Nations facilities or events (9.9%), or festivals and other events (3.8%).²⁰

²⁰ It is expected that museum and cultural centre visitation would include locations such as Tofino Clayoquot Heritage Museum, yet no specific details were provided by respondents.

Only 2% of visitors reported participation in other attractions and activities, which emphasizes the survey's accuracy in capturing the diversity of Tofino's offer to visitors. Therefore, these participation levels provide a good measure and valuable insight into what motivates visitors to come to Tofino while also identifying which activities or attractions play a lesser role in drawing visitors to the area.

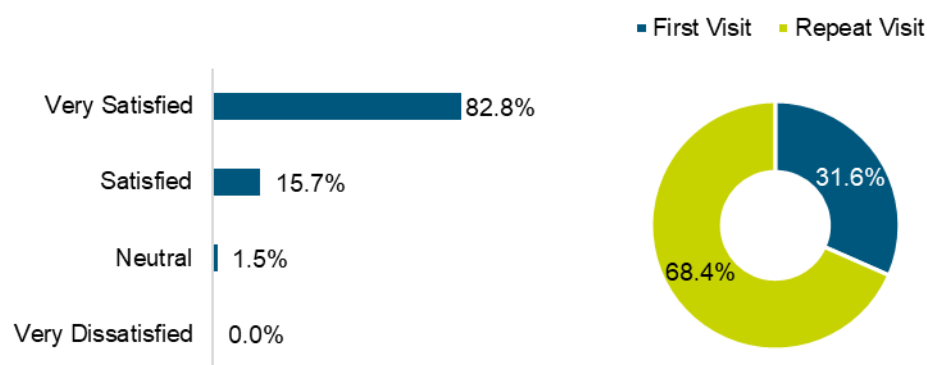
Visitor Satisfaction

This section analyses the satisfaction of visitors with their visit to Tofino.

Satisfaction and Repeat Visitation

Respondents expressed high levels of satisfaction with their visit to Tofino. More than four fifths of respondents were 'very satisfied' (82.8%) with their visit, compared to 68.2% from the 2018 survey, while nearly a fifth were 'satisfied' (15.7%). Only 2.3% of respondents reported a 'neutral' opinion or were 'very dissatisfied,' and no respondents indicated a 'dissatisfied' opinion. See **Figure B-16**.

Figure B-16: Visitor Satisfaction Levels and Repeat Visitation



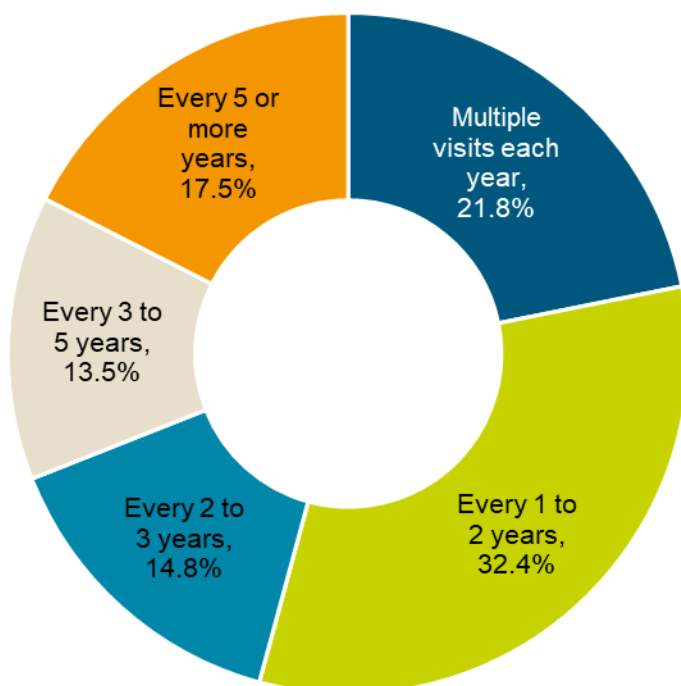
Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Over two-thirds of respondents were repeat visitors to Tofino (68.4%), almost a 10% increase from the 2018 survey, while 31.6% visited for the first time. The satisfaction levels of first-time and repeat visitors were similar, although no first-time visitors reported being 'very dissatisfied' or 'dissatisfied'.

Among the repeat visitors, more than a fifth visit multiple times a year, and a third every one to two years (**Figure B-17**). Over a quarter of repeat visitors visit Tofino every two to five years, and less than a fifth visit every five or more years. Unsurprisingly, the frequency of repeat visits is higher among visitors from British Columbia, particularly those living on Vancouver Island. For instance, 24.6% of repeat visitors from British

Columbia visit Tofino multiple times each year, and 29.6% of visitors living on Vancouver Island visit multiple times per year.

Figure B-17: Frequency of Repeat Visits to Tofino



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Net Promoter Score

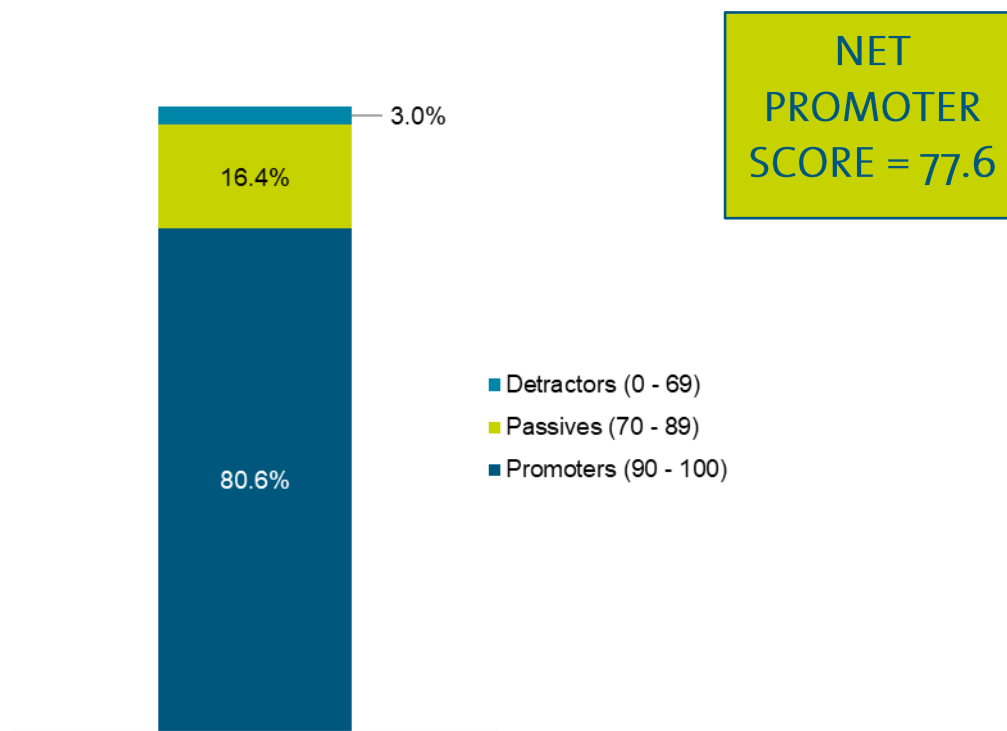
A 'net promoter score' is a tool used to measure the loyalty of visitors or customers to a destination or business and has been associated with revenue growth. In its simplest form, it evaluates the loyalty between a provider and a consumer.

Visitors were asked, 'How likely are you to recommend Tofino as a travel destination to a friend, family member, or colleague?' on a scale from 0 to 100, where 0 meant 'not at all likely' and 100 meant 'extremely likely'. Visitors who scored 90 to 100 are called 'promoters' and are likely to make positive referrals to others. Visitors scoring 70 to 89 are classified as 'passives'. Those scoring 0 to 69 are called 'detractors' and are less likely to give positive recommendations and may even share negative experiences. The net promoter score is calculated by subtracting the percentage of detractors from the percentage of promoters.

Figure B-18 shows the distribution of promoters, passives, and detractors among survey respondents. Majority of the respondents (80.6%) were promoters, scoring 90% or higher (80.6%). Nearly a fifth were

passives, with scores between 70 and 89 (16.4%), while only 3% were detractors, scoring 0 to 69. This gives Tofino a net promoter score of 77.6 ($80.6 - 3.0 = 77.6$).

Figure B-18: Net Promoter Profile



Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

In comparison, the 2018 survey recorded a net promoter score of 45.2, with a lower proportion of promoters (51.3%) and higher proportions of detractors (6.1%) and passives (42.6%). The 2024 survey shows a notable reduction in both detractors and passives, along with an increase in promoters, which has led to a substantial increase in the net promoter score.

A net promoter score above 0 is positive, and a score above 50 is considered excellent. With a net promoter score of 77.6, Tofino's result reflects a very strong appeal as a tourism destination and its success in attracting visitors. This is further supported by the high proportion of promoters (80.6%) and a high rate of repeat visitors (68.4%).

Cross-tabulating visitor's net promoter class with other variables provides some interesting insights. For instance, visitors from the United States reported 'excellent' net promoter scores for Tofino of 82.5, higher than those from Canada (78.1) and other international countries (68.3). The length of stay also influenced the

net promoter score, as shown in **Table B-2**. Visitors staying for long vacations of 8 to 14 nights had the highest net promoter score (81.8), while day trip visitors recorded the lowest score (62.0). Day trippers reported lower satisfaction primarily due to the high costs associated with visiting Tofino, mismatched personal preferences, and crowded attractions.

Table B-2: Net Promoter Score of visitors by length of stay in Tofino

Length of stay in Tofino	Detractors (0 - 69)	Passives (70 - 89)	Promoters (90 - 100)	Net Promoter Score
Day Trip	7.0%	23.9%	69.0%	62.0
Getaway (1-2 nights)	3.9%	17.5%	78.6%	74.7
Mini Vacation (3-4 nights)	2.3%	14.7%	83.0%	80.8
Vacation (5-7 nights)	2.0%	17.5%	80.5%	78.6
Long Vacation (8-14 nights)	4.0%	10.1%	85.8%	81.8
Extended Holiday (15 plus nights)	3.7%	22.8%	73.5%	69.8

Source: InterVISTAS visitor survey and calculations. Totals may not sum due to rounding.

Appendix C: Economic Impact Methodology



SUMMARY

- **Nearly 350 tourism related businesses were contacted** to provide input to the employment survey
- **Visitation and visitor expenditure data collected** from data on accommodations providers and the visitor intercept survey
- **Study time frame:** 2024 operations and visitation
- **Economic multipliers and ratios source:** Statistics Canada

Introduction

The study estimated the economic impact of Tofino's tourism related activities and operations in 2024. InterVISTAS utilized a two-pronged approach to estimate the economic impacts, aligning with the methodology used in past economic impact study conducted by InterVISTAS for Tourism Tofino. The first component of the economic impact analysis involved conducting an employment survey of tourism related businesses in Tofino. This survey served as the primary data collection tool for accommodations providers and tourism attractions and services. The second component of the analysis used data on visitor expenditures to assess the impact of visitor spending on food/beverage and retail in Tofino. This approach was necessary since it is difficult for these firms to estimate the proportion of their businesses related to tourists (e.g., it is challenging for a restaurant to identify what percentage of its revenues are attributed to visitors versus local residents).

To assess the direct employment impacts in the first component, the InterVISTAS study team reviewed and surveyed the employment landscape of Tofino's tourism-related businesses in 2024, including hotels, tour operators, and local attractions (nearly 350 firms). These firms were provided with an online employment survey to complete, yielding estimates of both the number of individuals employed in directly related occupations and the total earnings paid to all employees by tourism businesses in Tofino.

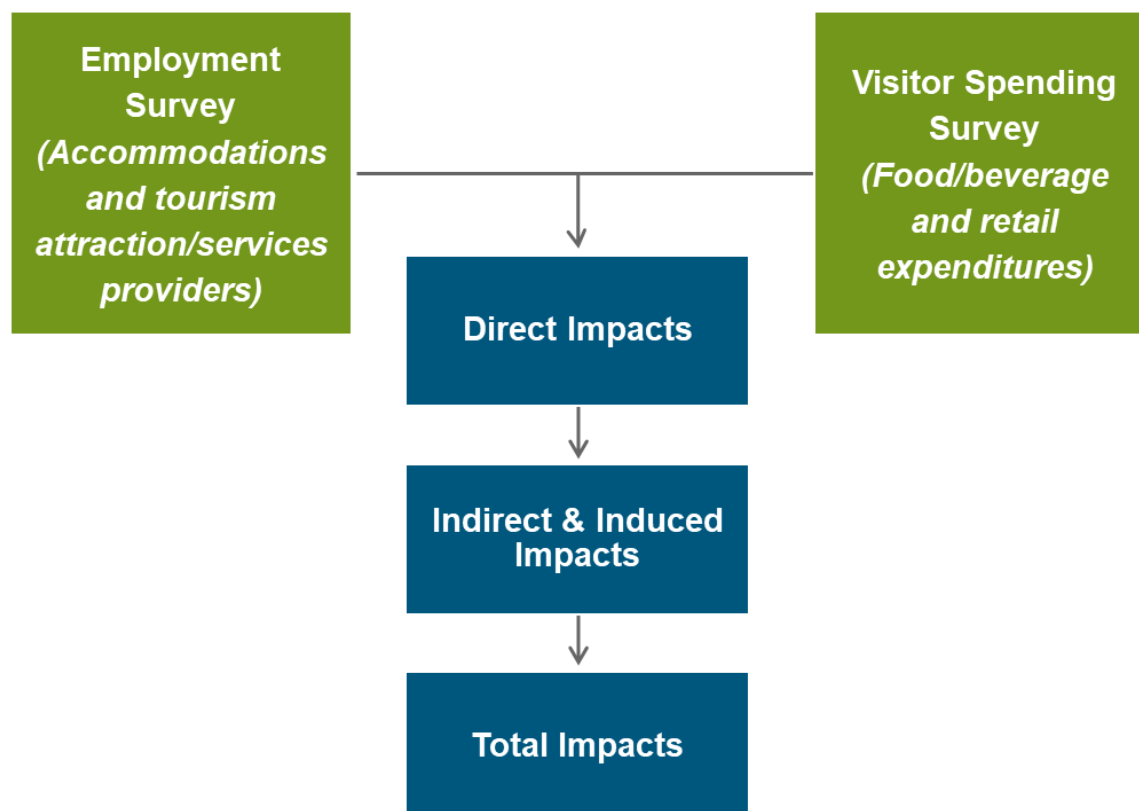
Furthermore, for the second component of the analysis, the impacts associated with Tofino's tourism visitor spending on food/beverage and retail within the Tofino area were evaluated. Based on the visitor spending estimated, the direct employment impacts generated per dollar of spending on food/beverage and retail were estimated using InterVISTAS' proprietary economic impact model. The model utilized the most current Statistics Canada multipliers and ratios, which are derived from the Statistics Canada Input-Output model of the Canadian and provincial economies.²¹

²¹ The multipliers used for the analysis are based on Statistics Canada economic multipliers for British Columbia from the 2021 Interprovincial Input-Output model, which is the most recent available. These multipliers were updated with Consumer Price Indices to account for inflation to 2024.

The indirect and induced effects were also estimated using the economic multipliers and ratios developed by Statistics Canada.²² Multiplier impacts were presented at the provincial level.

Figure C-1 provides an overview of InterVISTAS' two-pronged approach to estimate the economic impacts of tourism in Tofino.

Figure C-1: InterVISTAS' Two-Pronged Approach to Estimate Economic Impacts of Tourism



Data from the survey was used to calculate the associated tax impacts (government revenue) generated by Tofino's tourism industry activities and operations.

²² The multipliers used for the analysis are based on Statistics Canada economic multipliers for British Columbia from the 2021 Interprovincial Input-Output model, which is the most recent available. These multipliers were updated with Consumer Price Indices to account for inflation to 2024.

Estimating Direct Employment

The direct employment base related to the tourism sector in Tofino was measured first. Employment figures (jobs) are generally more understandable by the public than more abstract measures, such as economic output or GDP. Employment figures also have the advantage of being a more accurate measure, both because the firms are more likely to provide data on employment (as opposed to information on revenues, wages, and other monetary amounts), and because there is less chance of double-counting economic activity.

The economic impact study then assessed the indirect and induced (or “multiplier”) employment supported by Tofino’s tourism related activities and economic activity in terms of economic output and GDP, using Statistics Canada’s economic multipliers. The tax revenues generated by the tourism sector are also estimated.

Surveyed Direct Employment

Employment at accommodation providers, the destination marketing organization, attractions, and other tourism service providers was measured by surveying related businesses and organizations during 2024. Of the 347 surveys distributed, 104 firms replied. The survey response rate was 30%. Efforts were focused on collecting input from the largest and most significant tourism firms operating in the Tofino area. Approximately 70% of the total estimated direct employment at Tofino’s tourism related firms were captured by survey respondents.

The list of businesses surveyed was developed using a stakeholder contact list provided by Tourism Tofino. Surveys were completed online, and follow-up was conducted to prompt non-responding firms to complete the survey.

Inferred Direct Employment

Employment and other metrics were conservatively estimated using a proven and accepted methodology for businesses that did not respond to the survey. This included referencing the survey results for firms of similar business types and sizes, as well as a review of publicly available information and survey responses completed by firms for the previous study conducted by InterVISTAS for Tourism Tofino in 2018. There may be firms that were not surveyed because their existence was unknown. Employment for these non-surveyed firms was not estimated because there was no basis for assessment. It is expected that the volume of missed employment would be minimal.

Employment was “inferred” for firms that did not respond to the current year’s employment survey. For Tofino’s tourism sector direct employment, 30% of total direct surveyed employment was inferred.

Visitor Spending Impacts

In addition to the survey of tourism related employment in Tofino that covers various sectors, which encompasses areas like hotel accommodations, tour operations, and attractions, there is also an economic contribution stemming from visitor expenditures in the region. This spending spans sectors such as food/beverage and retail. As mentioned, visitor spending data was utilized to analyze visitor spending on these items only.

Visitor expenditure data was collected via a visitor intercept survey conducted in 2023/24, as described in **Appendix B**. Total visitor spending by overnight and same day visitors amounted to over \$144 million, which was spent on food/beverage and retail – not including amounts spent on accommodations, tour operations or attractions, and local transportation, as these impacts were already accounted for in the employment survey analysis discussed in previous sections.

Estimating Indirect, Induced and Other Economic Impacts

Measuring indirect and induced economic activity poses significant challenges. While surveying of such employers may be plausible, the survey would need to cover thousands of firms for indirect employment. For induced employment, the entire economy would need to be scrutinized. Apart from the considerable time and financial resources required for such surveys, the quality and reliability of responses would be suspect.

Instead of relying on costly and potentially inaccurate surveys, indirect and induced effects are commonly assessed using economic multipliers. These multipliers are derived from economic, statistical, and/or accounting models of the general economy.

The multipliers used for the analysis were based on Statistics Canada economic multipliers for B.C. from the 2021 Interprovincial Input-Output model, the most recent available. These multipliers were updated with Consumer Price Indices to account for inflation to 2024.

Other Economic Impacts: Economic Output and GDP

In addition to employment, the economic impact of the tourism industry can be measured in terms of the dollar impacts on the economy.

The two most common measures of economic contribution (in addition to employment) are GDP and economic output. Economic output roughly corresponds to the gross revenues of goods or services produced by an economic sector, while GDP measures only value-added revenues. As such, GDP removes the revenues to suppliers of intermediate goods and services and only includes the revenue from value-added production. Alternatively, economic output adds all revenues at each stage of production together as a measure of total production in the economy. Economic output will usually be greater than GDP (also termed value-added).

Economic output for a sector is achieved by taking the sum of gross revenues of the various firms in that sector. However, to find GDP for a sector, care must be taken to avoid double-counting. The revenues of one firm providing service to another are not incremental GDP. For example, in the automobile sector, one

cannot add the value (gross revenue) of a finished auto to the value of the tires. The tires are already included in the value of the automobile.

One approach to measuring economic output and value-added is to ask firms in a survey to provide information on their gross revenues, payments to suppliers, etc. However, there are several problems with the approach. First, capturing all of this information in a survey is too expensive. Second, the double-counting problem makes this approach impractical.

An alternative is to infer economic output and GDP for an economic sector from employment data using economic multipliers and ratios. Statistics Canada produces economic multipliers and ratios for Canada, and these are more cost effective and more accurate than obtaining the data from surveys. This method, using Statistics Canada economic multipliers and ratios for Canada, was the approach adopted here.

Tax Revenue Impacts

Tourism activity in Tofino also generates tax revenues. This includes revenues received by federal, provincial, and municipal government levels. The tax revenue contributions to the federal, provincial, and municipal levels of government that are associated with Tofino's tourism industry were also estimated. This includes taxes paid by employers and employees (such as payroll taxes) and an estimation of municipal taxes paid. Estimated tax revenues were calculated for the 2024 calendar year, using tax rates for 2023 in the computations.²³

²³ The employment and other assumptions on which tax revenues calculations are based are described in **Appendix D & Appendix E**.

Appendix D: Tax Revenues Attributable to Tourism Employers and Employees in Tofino

Introduction

This appendix describes the employment and other assumptions on which tax revenue calculations are based. It also presents the approaches used to estimate employer and employee contributions to local, provincial and federal governments. All estimates are for the 2023 calendar year.

Some taxes pose conceptual questions about how much, or if any, tax revenue from a particular source should be attributed to tourism businesses in Tofino. These questions are highlighted and simplifying assumptions are made.

Employment Generated and Supported by Tourism Activity

The tax calculations in this report are separated into two groups, the tax revenue contributions of employers and employees of accommodation providers and tourism service providers and the contributions of visitors. This appendix focuses on the analysis of taxes paid by employers or employees.²⁴ The total direct employment, in jobs, used for the calculations of the tax revenue paid by employers and employees is 3,190 jobs (rounded). The total direct payroll is estimated at \$131 million.

Personal Income Tax (Federal and Provincial)

Tax base and rates. Under the *Income Tax Act*, federal income tax is paid on taxable income at a rate that increases with taxable income.

Provincial income tax was formerly calculated as a percentage of federal tax, but most provincial governments have begun collecting taxes on a sliding scale.

Estimation Method and Results

Because the tax rate is progressive, the tax paid by a group of employees depends on the distribution of wages among employees. Unfortunately, the distribution of annual wages is not known, and average wages must be used. Each employee is assumed to pay tax as a single tax filer. Estimated income tax payable is \$11.3 million in federal tax and \$4.4 million in provincial tax.

²⁴ See **Appendix C** for details on the analysis of taxes paid by visitors to the Tofino area.

Table D-1: Personal Income Tax Revenues

Job Type	Jobs	Average Payroll	Payroll (\$k)	Average Income Tax Rates (%)		Estimated Income Tax (\$000)	
				Federal	Provincial	Federal (\$000)	Provincial (\$000)
Accommodations	1,137	\$ 44,215.72	\$50,268.03	8.8%	3.4%	\$4,412.00	\$1,684.39
Outdoor Recreation, Sport and adventure tourism, Surfing Schools, and Water Based Activity Equipment Suppliers	150	\$ 42,666.57	\$6,396.00	8.8%	3.4%	\$561.37	\$214.32
Guided Tour Operator (Wildlife Viewing Operators, Hiking and Paddling Tours, Fishing Tours, Food Tours)	186	\$ 60,264.50	\$11,191.06	10.9%	4.3%	\$1,216.18	\$485.90
Health & Wellness	21	\$ 31,419.81	\$652.43	7.0%	2.9%	\$45.56	\$18.74
Art, Culture & Entertainment	31	\$ 46,396.41	\$1,427.27	9.4%	3.5%	\$133.62	\$50.04
DMO	13	\$ 71,665.76	\$931.65	12.1%	4.8%	\$113.05	\$44.57
Air Transportation	10	\$ 112,448.21	\$1,090.00	14.4%	5.6%	\$157.13	\$61.30
Water Transportation	7	\$ 104,211.10	\$750.32	14.4%	5.6%	\$108.17	\$42.20
Transportation Services	10	\$ 28,345.91	\$295.74	5.4%	2.4%	\$15.93	\$7.21
Event & Wedding Planning	4	\$ 31,419.81	\$121.49	7.0%	2.9%	\$8.48	\$3.49
Airport	2	\$ 102,905.39	\$217.48	14.4%	5.6%	\$31.35	\$12.23
Food & Beverage	1,233	\$ 36,152.51	\$44,574.57	8.0%	3.1%	\$3,568.09	\$1,401.83
Shopping and other	388	\$ 34,333.98	\$13,312.64	7.0%	2.9%	\$929.57	\$382.48
TOTAL	3,191		\$131,228.69			\$11,300.50	\$4,408.71
				Average Tax Rate		8.6%	3.4%

The average tax rates used are derived from the more detailed calculations of taxes payable shown in Table B-2. In those calculations, assumptions about income from non-employment sources, tax deductions from income (e.g. RPP and RRSP contributions), and tax credits applied against tax otherwise payable (e.g. CPP, EI and charitable contributions) have been made. Average credits are calculated from Revenue Canada, *General Income Tax Forms, 2017*.

Table D-2: B.C. Single Tax Filer Income Tax Calculation – 2023

BC - British Columbia Single Tax Filer Income Tax Calculation																
Income																
Employment	\$ 10,000.00	\$ 20,000.00	\$ 30,000.00	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00	\$ 70,000.00	\$ 80,000.00	\$ 90,000.00	\$ 100,000.00	\$ 150,000.00	\$ 250,000.00	\$ 350,000.00			
TOTAL	\$ 10,000.00	\$ 20,000.00	\$ 30,000.00	\$ 40,000.00	\$ 50,000.00	\$ 60,000.00	\$ 70,000.00	\$ 80,000.00	\$ 90,000.00	\$ 100,000.00	\$ 150,000.00	\$ 250,000.00	\$ 350,000.00			
Deductions																
RSP	\$ 246.19	\$ 188.55	\$ 251.39	\$ 432.10	\$ 700.67	\$ 1,210.99	\$ 1,615.60	\$ 2,122.07	\$ 2,739.82	\$ 3,431.33	\$ 5,883.97	\$ 12,065.40	\$ 23,134.80			
RPP	\$ 75.36	\$ 45.82	\$ 64.71	\$ 173.80	\$ 173.80	\$ 445.79	\$ 806.66	\$ 1,088.63	\$ 1,496.71	\$ 1,988.99	\$ 2,669.11	\$ 2,745.05	\$ 2,067.07	\$ 1,427.67		
Carrying Charges	\$ 142.31	\$ 59.36	\$ 48.47	\$ 85.36	\$ 151.75	\$ 237.95	\$ 295.49	\$ 378.81	\$ 480.80	\$ 611.39	\$ 561.94	\$ 349.52	\$ 149.99			
Union	\$ 277.92	\$ 128.66	\$ 120.96	\$ 145.90	\$ 189.75	\$ 270.66	\$ 308.09	\$ 373.23	\$ 470.27	\$ 530.55	\$ 804.12	\$ 1,858.40	\$ 7,602.12			
TOTAL	\$ 741.79	\$ 422.39	\$ 485.52	\$ 837.16	\$ 1,487.97	\$ 2,526.26	\$ 3,307.81	\$ 4,370.82	\$ 5,679.88	\$ 7,242.38	\$ 9,995.08	\$ 16,340.39	\$ 32,314.57			
Taxable Income	\$ 9,258.21	\$ 19,577.61	\$ 29,514.48	\$ 39,162.84	\$ 48,512.03	\$ 57,473.74	\$ 66,692.19	\$ 75,629.18	\$ 84,320.12	\$ 92,757.62	\$ 140,004.92	\$ 233,659.61	\$ 317,685.43			
Credits																
Basic Federal	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00			
Basic Provincial	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00	\$ 11,981.00			
CPP	\$ 1,076.54	\$ 590.80	\$ 548.75	\$ 889.50	\$ 1,244.23	\$ 1,684.05	\$ 1,926.81	\$ 2,027.44	\$ 2,098.40	\$ 2,221.85	\$ 2,234.13	\$ 2,038.53	\$ 1,737.96			
EI	\$ 538.76	\$ 232.41	\$ 195.81	\$ 302.72	\$ 412.99	\$ 548.05	\$ 583.88	\$ 607.38	\$ 624.21	\$ 655.43	\$ 645.71	\$ 535.16	\$ 401.89			
Charity	\$ 6.64	\$ 14.23	\$ 30.75	\$ 55.27	\$ 77.22	\$ 100.90	\$ 118.92	\$ 144.30	\$ 163.49	\$ 179.98	\$ 242.93	\$ 467.89	\$ 4,855.63			
Fed. Total	\$ 16,621.94	\$ 15,837.44	\$ 15,775.31	\$ 16,247.49	\$ 16,734.45	\$ 17,343.00	\$ 17,629.61	\$ 17,779.12	\$ 17,886.10	\$ 18,057.25	\$ 18,122.77	\$ 18,041.59	\$ 21,995.48			
Prov. Total	\$ 13,602.94	\$ 12,818.44	\$ 12,756.31	\$ 13,228.49	\$ 13,715.45	\$ 14,324.00	\$ 14,610.61	\$ 14,760.12	\$ 14,867.10	\$ 15,038.25	\$ 15,103.77	\$ 15,022.59	\$ 18,976.48			
Federal Tax Credit Rate	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%			
Provincial Tax Credit Rate	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%			
Federal Credits	\$ 2,493.29	\$ 2,375.62	\$ 2,366.30	\$ 2,437.12	\$ 2,510.17	\$ 2,601.45	\$ 2,644.44	\$ 2,666.87	\$ 2,682.91	\$ 2,708.59	\$ 2,718.42	\$ 2,706.24	\$ 3,299.32			
Provincial Credits	\$ 688.31	\$ 648.61	\$ 645.47	\$ 669.36	\$ 694.00	\$ 724.79	\$ 739.30	\$ 746.86	\$ 752.28	\$ 760.94	\$ 764.25	\$ 760.14	\$ 960.21			
Tax Payable																
Federal - Bracket 1	\$ 1,388.73	\$ 2,936.64	\$ 4,427.17	\$ 5,874.43	\$ 7,276.80	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85	\$ 8,003.85			
Federal - Bracket 2	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 843.52	\$ 2,733.30	\$ 4,565.39	\$ 6,347.03	\$ 8,076.72	\$ 10,938.39	\$ 10,938.39	\$ 10,938.39			
Federal - Bracket 3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,654.86	\$ 15,265.38	\$ 15,265.38			
Federal - Bracket 4	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 19,786.59	\$ 20,371.05			
Federal - Bracket 5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,063.44			
Federal Total	\$ 1,388.73	\$ 2,936.64	\$ 4,427.17	\$ 5,874.43	\$ 7,276.80	\$ 8,847.37	\$ 10,737.15	\$ 12,569.24	\$ 14,350.88	\$ 16,080.57	\$ 27,597.10	\$ 53,994.21	\$ 81,642.11			
Basic Federal	\$ -	\$ -	\$ 1,322.57	\$ 2,750.17	\$ 4,107.33	\$ 5,381.28	\$ 6,245.92	\$ 8,092.71	\$ 9,902.37	\$ 11,667.97	\$ 13,371.98	\$ 24,878.68	\$ 51,287.97	\$ 78,342.79		
BC - British Columbia - Bracket 1	\$ 468.47	\$ 990.63	\$ 1,493.43	\$ 1,981.64	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09	\$ 2,310.09			
BC - British Columbia - Bracket 2	\$ -	\$ -	\$ -	\$ -	\$ 220.07	\$ 910.12	\$ 1,619.94	\$ 2,308.09	\$ 2,977.29	\$ 3,515.51	\$ 3,515.51	\$ 3,515.51	\$ 3,515.51			
BC - British Columbia - Bracket 3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 152.00	\$ 1,420.13	\$ 1,420.13	\$ 1,420.13			
BC - British Columbia - Bracket 4	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,760.83	\$ 2,760.83	\$ 2,760.83			
BC - British Columbia - Bracket 5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,659.54	\$ 6,659.54	\$ 6,659.54			
BC - British Columbia - Bracket 6	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 10,257.68	\$ 24,378.02	\$ 24,378.02			
BC - British Columbia - Bracket 7	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 15,778.73			
BC - British Columbia - Bracket 8	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
BC - British Columbia Total	\$ 468.47	\$ 990.63	\$ 1,493.43	\$ 1,981.64	\$ 2,530.16	\$ 3,220.21	\$ 3,930.03	\$ 4,618.18	\$ 5,287.38	\$ 5,977.60	\$ 11,874.32	\$ 26,923.77	\$ 56,818.85			
Basic Provincial	\$ 14.62	\$ 598.91	\$ 1,080.48	\$ 1,538.30	\$ 2,160.82	\$ 2,495.42	\$ 3,190.74	\$ 3,871.32	\$ 4,535.11	\$ 5,216.67	\$ 11,110.07	\$ 26,163.63	\$ 55,858.64			
TOTAL TAX PAYABLE	\$ 14.62	\$ 1,921.48	\$ 3,830.65	\$ 5,645.63	\$ 7,542.10	\$ 8,741.34	\$ 11,283.45	\$ 13,773.69	\$ 16,203.07	\$ 18,588.65	\$ 35,988.76	\$ 77,451.60	\$ 134,201.43			
Average Rate of Tax	0.1%	7.8%	11.1%	12.9%	14.2%	15.2%	16.9%	18.2%	19.2%	20.0%	25.7%	33.1%	42.2%			
Federal	0.0%	5.4%	8.0%	9.4%	10.2%	10.9%	12.1%	13.1%	13.8%	14.4%	17.8%	21.9%	24.7%			
Provincial	0.1%	2.4%	3.1%	3.5%	4.1%	4.3%	4.8%	5.1%	5.4%	5.6%	7.9%	11.2%	17.6%			

Corporate income tax (federal and provincial)

All corporations are liable to pay federal income tax under the *Income Tax Act*. The tax rate varies by type and size of company and by province. Provincial governments also levy a corporation income tax on any company having a permanent establishment in that province.

Estimation Method and Results

1. Calculating tax liability precisely is very difficult. It requires knowledge of the total tax base, and the proportion of the tax base attributable to the provinces. Therefore, an approximate method has been used.
2. In British Columbia, the federal corporate income tax collected per employee was \$4,657, the provincial corporate income tax collected per employee was \$3,295 in 2023.
3. Assuming all companies pay tax at the average rate per employee calculated above, the tourism employment sector's 2017/18 corporation income tax liability is estimated to be \$15 million toward federal revenues and \$10 million toward provincial revenues. The estimated total corporate income tax revenue is \$25 million, as shown in **Table B-3**.

Table D-3: Estimated Corporate Income Tax Paid by Tofino's Tourism Industry

Government	Revenue (\$ Millions)
Federal	\$15
Provincial	\$10
Total	\$25

Employment Insurance premiums

Tax base and rates. In 2023, employees in Canada paid employment insurance (EI) premiums equal to 1.63% of earnings, up to a maximum of \$1,002.45 per year. (Maximum insurable earnings are \$61,500). Employers paid EI premiums equal to 1.4 times employee premiums.

Estimation Method and Results

The employee premium rate is applied to total payroll costs for employees earning less than \$61,500 annually. The maximum contribution was used for employees earning more than \$61,500 per year. Estimated employee payments were approximately \$2 million.

The employer rate is applied to the employee payments. Estimated employer payments were approximately \$3 million.

Canada Pension Plan contributions

Tax base and rates. In 2023, employee contributions to the Canada Pension Plan (CPP) were 5.95% of pensionable earnings. Pensionable earnings are actual earnings less \$3,500, to a maximum of \$66,600. The maximum annual employee contribution is \$3,754.45. The employer contribution is the same as the employee contribution.

Estimation Method and Results

The employee contribution rate is applied to the average payroll for employees earning less than \$66,600 a year. The maximum contribution was used for employment earning more than the maximum pensionable earnings.

Estimated employer and employee contributions are estimated at \$7.7 million each, for a total of \$15.5 million.

WorkSafeBC contributions

Tax base and rates. Employers in British Columbia must contribute to WorkSafeBC to help offset the cost of on-the-job injuries. Employers are classified into industry groups. The contribution rate for each group is based on the injury costs associated with all companies in that group.²⁵ The group contribution rate varies widely among industries and provinces. Some major companies are not included in the general “rateable” method of contribution but simply pay the actual cost of their claims plus an allowance for WorkSafeBC administration costs. As it is not generally known which firms contribute in this manner, nor the value of their claims, an estimate based on reported payroll has been made for all firms.

Conceptual issues. Some companies are self-insured, and their payments could be viewed as a business expense rather than a tax. However, we have chosen to include their contribution because they are required to be part of this government-mandated program.

Estimation Method and Results

The contribution rates for each employment classification have been applied to the total payroll for that group. Tourism firms’ employees paid an estimated \$1.5 million to WorkSafeBC.

²⁵ Subject to Experience Rating Adjustment for individual companies.

Property Tax

InterVISTAS used information from the District of Tofino 5 year financial plan (2024-2028) to estimate the proportion of municipally collected tax that is attributable to residential and commercial property owners.²⁶

The proportions of residential and commercial property tax collected outlined in the financial plan were then applied to the District of Tofino 2023/2024 tax revenue to estimate property tax collections. InterVISTAS assumed that approximately 33% of residential property tax collected can be associated with employers in the tourism industry. Additionally, InterVISTAS assumed that approximately 66% of commercial property tax paid is associated with employees in the tourism industry.

²⁶ <https://tofino.civicweb.net/document/156281/>

Appendix E: Tax Revenues Attributable to Visitor Spending in Tofino

Introduction

This appendix describes the visitor spending and other assumptions on which tax revenue calculations are based. The approaches used to estimate visitor contributions to local, provincial and federal governments are presented. Tax revenues paid by visitors are based on 2018 visitor spending information, as collected in the visitor spending survey.

Some of the taxes pose conceptual questions about how much, or if any, tax revenue from a particular source should be attributed to tourism in Tofino. These questions are highlighted and simplified assumptions are put forth.

Spending Generated and Supported by Tourism Activity

The tax calculations are separated into two - the tax revenue contributions of employers and employees in accommodation and tourism service providers and the contributions of visitors. This appendix focuses on the analysis of taxes paid by visitors to Tofino. Visitors to Tofino contribute to tax revenues through consumption taxes levied on items such as accommodations, food & beverage, retail, transportation and tours/attractions. The contributions of visitors are calculated based on visitor spending data and employment data collected by Tourism Tofino in 2023/2024, which totals over \$430 million.

The following table shows the estimated visitor spending by category and the estimated taxes associated with those expenditures. Visitor expenditures in British Columbia are subject to federal GST of 5% and provincial tax of 7%. The provincial tax rate for accommodations specifically is 8%.

Table E-1: 2023 Visitor Spending Sales Taxes

	Total Spending (\$ Millions)	Federal GST (\$ Millions)	Provincial PST (\$ Millions)	Total Tax (\$ Millions)
Accommodations	\$236	\$10	\$17	\$27
Food & Beverage (Restaurants)	\$106	\$5	Exempt	\$5
Retail	\$38	\$2	\$2	\$4
Local Transportation	\$12	\$0.5	\$0.7	\$1
Recreation & Entertainment	\$40	\$2	Exempt	\$2

Note: Figures may not sum to totals due to rounding.

Municipal and Regional District Tax (MRDT)

In June 2017, The Province of British Columbia approved an increase in the tax rate on accommodation purchases to 3%, up from 2% in the year prior. InterVISTAS used MRDT revenues from the 2017 District of Tofino Annual Report for this figure, which amounted to nearly \$1.4 million.²⁷

²⁷ <https://tofino.civicweb.net/filepro/document/80622/2017%20Annual%20Report.pdf>



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