



Victoria Residents' Perceptions of Tourism in Victoria

prepared for

Destination Greater Victoria

by

Acres
COMMUNICATIONS

Insights West 

October 2020

Background

In September 2020, **Destination Greater Victoria** (DGV) contracted with **Acres Communications** to coordinate a public opinion research project aimed at assessing current attitudes of City of Victoria residents towards the local tourism industry. Acres Communications sought proposals from three professional market research firms experienced in conducting opinion research in the Victoria area. DGV selected Vancouver-based **Insights West** for their experience throughout BC and their capabilities in conducting research to understand shifting markets and consumer and societal trends.

Methodology

Insights West conducted an online survey with 701 City of Victoria residents aged 18 years or older from September 28 to October 6, 2020. An overall sample of this size is considered accurate within +/-3.7%, 19 times out of 20.

The survey was conducted using Insights West's Feedback Community, a panel of Canadian residents recruited from a variety of sources, and from other panels provided by partner providers. Data were obtained only from residents of the City of Victoria. The survey questionnaire was drafted collaboratively by Insights West, Acres Communications and DGV and consisted of seven questions together with standard demographic questions to determine age and gender, and to verify place of residence.

To ensure a representative sample of City of Victoria adults, the data were weighted by age and gender according to Statistics Canada census data. Respondents were split between 47% males and 53% females, with 32% aged 18-34, 28% aged 35-54, and 39% aged 55 years or older.

Results

Question A1. How important do you think tourism is for Victoria and the surrounding region?

The opening question sought to establish the degree to which tourism is perceived by residents as important or unimportant in the Victoria region. Almost all residents (97.5%) perceive tourism to be important for the Victoria region.

How important do you think tourism is for Victoria and the surrounding region?	#	%
Very important	539	76.8%
Somewhat important	145	20.7%
Not too important	13	1.8%
Not Important at all	4	0.6%

Question A2. What are the main reasons for thinking that tourism is [A1 RESPONSE] for Victoria and the surrounding region?

The second question was open-ended and asked residents to explain why they answered Question A1 the way they did. Among those who felt tourism was important to the region, the overwhelming majority cited the economic contributions tourism makes to the region, the tax revenues it generates and the jobs it supports. The small number of respondents who said tourism is not important suggested the region should be more focused on controlling COVID-19 and on diversifying the local economy to reduce reliance on tourism.

Question A3: How much do you agree or disagree with each of the following statements about tourism in Victoria?

In Question A3, respondents were presented with a series of statements concerning tourism’s perceived impact on the Victoria region – positively and negatively – and asked to what extent they agreed or disagreed with each statement. The statements were randomized so successive respondents would see the statements in a different order, thereby minimizing any potential bias due to how the statements were sequenced.

Ranked by those who agreed, completely or somewhat	Tourism...	Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree
1	Provides jobs for local residents	65%	29%	4%	1%	0%
2	Supports small businesses in Victoria	63%	30%	4%	2%	1%
3	Provides positive exposure for our region	58%	34%	6%	1%	1%
4	Creates new business opportunities	53%	36%	8%	2%	0%
5	Provides activities, experiences and facilities that residents can also enjoy	50%	38%	9%	2%	1%
6	Brings diversity and different cultures to our region	45%	38%	12%	4%	1%
7	Helps make Victoria a good place to live and work	37%	40%	14%	6%	3%
8	Makes Victoria a more expensive place to live	23%	38%	25%	10%	5%
9	Damages nature and the environment	9%	36%	29%	19%	7%
10	Overloads local infrastructure and facilities	11%	32%	29%	21%	7%
11	Diverts resources from amenities and services for residents	10%	24%	33%	22%	11%

Respondents agreed most frequently (89%-95%) with statements regarding tourism’s support for business and jobs as well as providing positive exposure for the region. More than three-quarters of respondents also agreed that tourism brings other benefits such as cultural diversity and contributes to quality of life. Of the potential negative impacts presented, 6-in-10 agreed that tourism increases the cost of living, while fewer than half perceived that tourism negatively affects the environment, overloads infrastructure, or diverts amenities and resources from local residents.

Question A4: How much do you agree or disagree that the benefits of tourism in Victoria outweigh potential disadvantages?

Using the same scale as Question A3, respondents were asked whether they agreed or disagreed that the benefits of tourism in Victoria outweigh the disadvantages.

How much do you agree or disagree that the benefits of tourism in Victoria outweigh potential disadvantages?	#	%
Completely agree	278	40%
Somewhat agree	283	40%
Neither agree nor disagree	100	14%
Somewhat disagree	30	4%
Completely disagree	10	1%

A large majority (80%) of respondents felt the benefits of tourism outweigh its potential drawbacks; 14% were neutral; and 6% felt tourism impacts the region more negatively than positively.

Question A5: What do you see as the most important priority or opportunity for tourism in Victoria over the next five (5) years?

This open-ended question was asked to gain an understanding of what Victoria residents believe should be the main priority or opportunity for the local tourism industry over the next five years. As the survey was conducted during the COVID-19 pandemic when tourist traffic was extremely limited, not surprisingly nearly a third of the respondents named recovering from the pandemic-inflicted tourism downturn as the top priority. Other themes included:

- Sustainability – protecting and enhancing the environment
- Safety – ensuring visitors feel safe and have an enjoyable experience
- Small business and jobs – promoting a business environment where small businesses can thrive and create more jobs
- Diversification – increasing the range of experiences available to visitors
- Infrastructure – improving infrastructure to benefit both visitors and local residents
- Balance – developing activities that appeal to both visitors and locals, and to all ages
- Affordability – ensuring activities remain affordable for international and Canadian visitors, as well as for local residents

Question A6: Which four (4) of the following are most important for the tourism industry in Victoria to focus on over the next five (5) years?

In this question, participants were provided a list of 11 possible priorities for the local tourism industry to focus on over the next five years, and were asked to identify their top four preferences, ranking them from 1 to 4. The statements were randomized so each respondent would see them in a different order, thereby minimizing any potential bias due to how the statements were sequenced.

Rank	Area of Focus	Total rankings, 1-4	% rank in Top 4
1	Building a year-round visitor economy that supports businesses and jobs all year.	368	52%
2	Ensuring tourism provides benefits for residents and local communities.	330	47%
3	Enhancing tourism’s environmental, social and cultural sustainability.	313	45%
4	Providing activities and experiences that residents can also enjoy.	294	42%
5	Helping provide more or new opportunities for businesses and jobs in Victoria.	275	39%
6	Increasing tourism’s economic impacts to benefit business sales, jobs and contributions to taxes.	265	38%
7	Promoting Victoria as a great place to visit and explore.	250	36%
8	Encouraging visitors to stay longer and spend more in Victoria and the surrounding region.	193	28%
9	Promoting conferences, major events and festivals.	181	26%
10	Developing new tourism products and activities.	160	23%
11	Promoting and hosting sports events.	84	12%

Consistent with the verbatim responses to Question A5, most respondents said the focus should be on developing the tourism industry to support the local economy and provide other benefits for local communities. Respondents also identified sustainability as it relates to the tourism industry as a top priority, ranking it as a top 4 priority third most frequently. To determine the relative importance of each area of focus it would be necessary to score the responses based on whether they were ranked first, second, third or fourth by respondents, which could be completed as further analysis of these data.

These relative rankings were generally consistent when analyzed according to respondents’ age category as well as gender, indicating a consistent level of alignment on priorities across all residents. There are, however, a few interesting differences. Compared to males, females are more likely to feel that enhancing tourism’s sustainability is important (49% females vs. 40% males). Building a year-round visitor economy that supports businesses and jobs all year is more important to older residents (59% among 55+ vs. 53% 35-54 and 44% 18-34 years). In contrast, those aged 35 to 54 are more likely to think that providing more opportunities for businesses and jobs in Victoria is important (45% vs. 39% 55+ and 34% 18-34).

Question A7: Overall, how would you rate the value of tourism to the Victoria region?

This concluding question is similar to Question A1 and was included partly as an internal validation measure to gauge whether responding to Questions A3 through A6 influenced residents’ initial impressions of tourism in the Victoria region.

Overall, how would you rate the value of tourism to the Victoria region?	#	%
10 – Very valuable/great for Victoria	231	33.0
9	106	15.1
8	178	25.3
7	89	12.7
6	40	5.7
5	31	4.5
4	16	2.3
3	6	0.8
2	2	0.3
1 – No value/does not benefit Victoria	2	0.3

Although the wording of questions A1 and A7 and the scale used are different (QA1 measures “importance”, QA7 measures “value”), those who answered “8” or higher to this question (73%) is comparable to the percentage of respondents who answered “very important” to question A1 (77%). This comparison suggests the process of answering Questions A3 through A6 had little influence on residents’ overall perceptions of the tourism industry.

More than 9 out of 10 respondents (92%) consider tourism to be very or somewhat valuable to the Victoria region; fewer than 1 in 10 respondents (8%) feel that tourism has limited or no value to the region. Victoria residents award a strong mean score of 8.3 out of 10 for the value of tourism to the Victoria region.

Conclusions

This representative sample of City of Victoria residents indicates that a large majority of the city’s adult population places a high degree of importance on the local tourism industry, mostly for the contributions it makes to the local economy – supporting businesses and jobs, creating new business opportunities and contributing tax revenues. A similarly large majority feels the benefits of tourism outweigh its potential drawbacks.

Looking to the future, residents believe the focus should remain on building the industry to support businesses and jobs year-round, as well as enhancing the sustainability of the industry and ensuring tourism benefits local communities and provides opportunities and experiences for local residents.

Throughout the survey, there were few gender-based differences in the responses. There were minor age-based differences, most noticeably in identifying future priorities for tourism, with younger

respondents favouring enhancing sustainability and providing benefits for local residents and older respondents placing more importance on generating economic opportunities.

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About Acres Communications

Acres Communications provides a full range of communications consulting services including media and public relations, project management, event coordination, strategy development and analysis, media and presentation training, and all styles of writing. Since 2014, Acres Communications has assisted clients in the aerospace, transportation, tourism, road safety, insurance, planning and engineering, executive search and municipal government sectors.

About Insights West

Insights West is a full-service marketing research firm, with a team of passionate, truth-seeking researchers who question everything to uncover the truth and what is emerging for a diverse set of clients. With an understanding of shifting markets, consumer and societal trends, and a commitment to uncovering truths through a proprietary toolkit and innovative research approaches, Insights West helps organizations make better decisions.