

# CANADA INDUSTRY BRIEF

## 2023 NATIONAL RESIDENT SENTIMENT

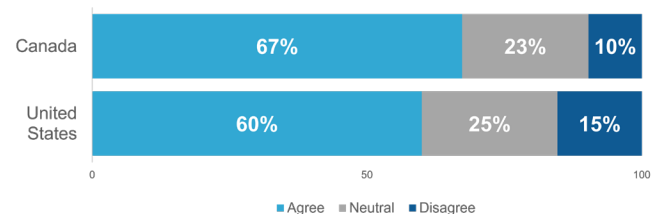


### Introduction

In general, support for tourism remains strong in Canada. However, there are some areas in which we are beginning to see some declining sentiment. Despite some of the declines, when compared to the United States, Canadians are still generally more supportive of tourism than Americans. In this year's study, which was fielded in August 2023 and included a representative sample of 1,000 Canadians, perceptions of some of the positive impacts of tourism were not as strong as previous years.

Many Canadians (67%) agree that, in general, the positive benefits of tourism outweigh the negative impacts. This has stayed relatively consistent since 2021 and is seven points higher than the United States (60%).

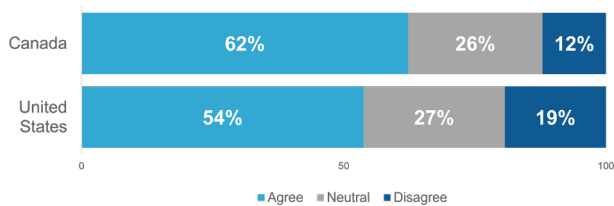
**In general, the positive benefits of tourism outweigh the negative impacts**



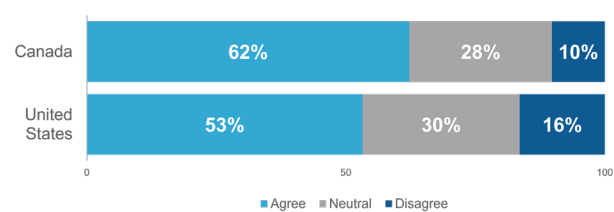
Also consistent over the years are Canadians' support for tourism growth, with seven in ten agreeing that tourism should be encouraged (72%), and that they support tourism growth (69%). At the same time, however, perceptions that provincial and municipal governments are doing a good job managing the pace of tourism development declined in 2023. Less than four in ten Canadians (37%) agree that their provincial and municipal governments are doing a good job managing the pace of tourism development, a significant drop since 2022 (provincial: 44%, municipal: 45%).

Canadians continue to recognize the economic benefits of tourism to their communities. Six in ten Canadians (62%) agree that tourism is important to their local economy and encourages investments. These results are significantly higher than the United States where half of Americans agree that tourism is important to their local economy (54%) and encourages investments in their local economy (53%).

**Tourism is important to my local economy**



**Tourism encourages investment in our local economy**

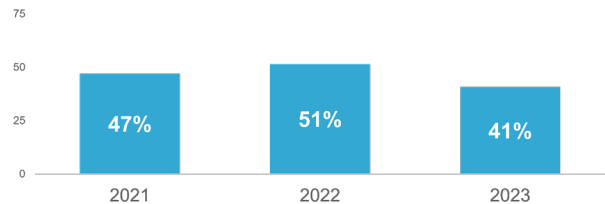


While Canadians see the economic benefits to their community, perceptions of the personal economic benefits of tourism are trending downward. Only a quarter of residents (26%) agree their household standard of living is higher because of the money tourists spend in their area, a six-point decline since 2021 when 32% of Canadians agreed with this statement.

Perceptions of the benefits tourism brings to residents' quality of life has declined in some cases, but the results are in line with perceptions in the United States. Four in ten Canadians agreed that the quality of life in their province (42%) and local areas (39%) have improved because of increased tourism. Nearly half (46%) still agree they have more recreational opportunities (places to go and things to do) because of tourism in this area; however, it is four points lower than previous years.

Canadians are expressing some growing concern about the environmental impacts of tourism. Compared to previous years, Canadians are less likely to perceive tourism to be a good alternative to more environmentally damaging development. Forty-four percent of Canadians agree with this statement compared to 51% in 2022 and 48% in 2021. Canadians are also reporting declining perceptions of the value the tourism industry has for sustainability. Four in ten Canadians (41%) agreed that the tourism industry values sustainability and the natural resources, compared to 51% in 2022 and 47% in 2021.

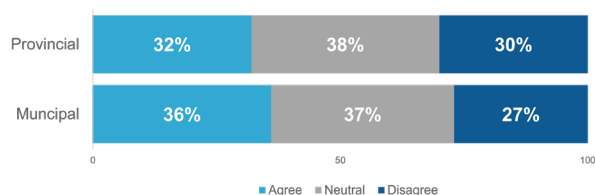
**The tourism industry values sustainability and our natural resources**





In this year's study, Canadians also provided their perceptions of their governments' performance in balancing resident quality of life and visitor satisfaction. Less than four in ten Canadians agreed their provincial and municipal governments were doing a good job balancing resident quality of life and visitor satisfaction (32% and 36%, respectively). These results are similar to Americans' perceptions of their state and local governments' performance in this area (35% and 36%, respectively).

**My provincial/municipal government is doing a good job balancing resident quality of life and visitor satisfaction**



As destination organizations are placing a growing emphasis on destination stewardship, the fact that nearly four in ten Canadians expressed neutral sentiments to these statements suggests an opportunity to help shape these perceptions and communicate the efforts being made to address the impacts of tourism and balance both resident and visitor needs. Many Canadians are receptive to receiving tourism news, with half (52%) agreeing that when they come across tourism news, they're interested in finding out what's happening.

Canadians' interest in tourism news provides a great opportunity for advocacy efforts highlighting the work destination organizations are doing to balance resident quality of life and visitor satisfaction. While sentiments were down this year in some areas, communicating these stewardship efforts can help improve residents' perceptions of tourism and its contributions to their quality of life, local economy, and the environment.



## Key Takeaways

1

Highlight destination stewardship efforts. Many Canadians do not have a strong opinion on whether governments are doing a good job balancing resident quality of life and visitor satisfaction. This is an opportunity to inform residents' understanding of destination stewardship efforts.

2

Communicate the benefits of tourism to residents and communities. Canadians' perceptions of the positive impacts of tourism declined in 2023 suggesting the need for better communication about the industry's contributions to the local economy, environment, and quality of life.

3

Continue advocacy efforts. Leverage Canadians' interest in local tourism news by engaging with residents and communicating the industry's contributions to creating a place where people not only want to visit, but live and work as well.