

SOUTHERN GULF ISLANDS

Residents' Perceptions of the Southern Gulf Islands' Tourism Industry

2025 Survey Data

Prepared March 2026



CONTENTS

03 Objectives and methodology

05 Highlights

09 Overall measures

11 Economic impact

14 Commitment to sustainability

17 Welcoming community

21 Appendix

OBJECTIVES AND METHODOLOGY

SOUTHERN
**GULF
ISLANDS**

OBJECTIVES AND METHODOLOGY

SGITP plans to conduct a Residents' Perceptions of Tourism survey on an annual basis to track and monitor sentiment. The insights from the study will help inform SGITP's destination marketing and stewardship strategies, incorporating residents' influence on tourism planning, as well as to measure progress on its Five-Year Strategic Plan (2024-2029).

The key research objectives are to:

1. Identify how the tourism industry is perceived when it comes to being a contributor to economic activity in island communities.
2. Determine how important the tourism industry is perceived to be to the well-being of island communities.
3. Measure perceptions of the economic, social/cultural, and environmental impacts tourism has in island communities.
4. Gauge resident attitudes toward tourism volume in island communities during each season.

The survey was conducted by The Sentis Group, in collaboration with Destination BC, as follows:

- 156 online surveys were conducted with Southern Gulf Island residents aged 18 and older using online consumer panels.
- To qualify for the survey residents had to be able and willing to identify the region of the province where they live.
- No more than 10% of the total sample could be employed in the tourism industry.
- Data collection took place from October 2nd to 30th, 2025.
- The survey took an average of 8 minutes to complete.
- Analysts confirmed the reliability of the sample size.

A man is captured mid-jump from a wooden dock into a calm lake. He is shirtless, wearing black swim trunks, with his arms and legs spread wide in a 'V' shape. The dock is made of wet wooden planks, reflecting the overcast sky. In the background, a dense forest of evergreen and some deciduous trees lines the shore, with a few small houses visible. The sky is grey and cloudy.

HIGHLIGHTS

SOUTHERN
GULF
ISLANDS

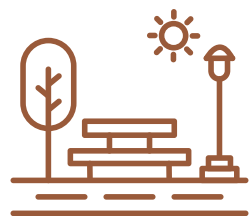
HIGHLIGHTS

Residents value the economic benefits and the community vibrancy tourism brings to their islands.



72%

Value the contribution visitors make to the local economy.



66%

Agree that tourism supports a greater diversity of amenities.



83%

Agree that tourism supports local businesses in the community.

Research indicates strong community consensus regarding tourism’s economic impact. Most residents recognize that visitor contributions are fundamental to business stability, while also crediting the sector with enhancing the region’s range of amenities.

For the purposes of this research, the word amenity refers to the modern (1913 to present day) Oxford English Dictionary definition:

“A desirable or useful feature or facility in a place, means of transport, etc.; a useful building, fitting, piece of equipment, or the like; an advantageous feature of a location serving to enhance its attractiveness as a place to live, work, etc.”

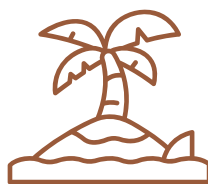
HIGHLIGHTS

Residents feel positively about welcoming people to the islands as a tourism destination.



73%

Agree that they take pride in making visitors feel welcome.



90%

Believe the islands are a desirable place to visit.



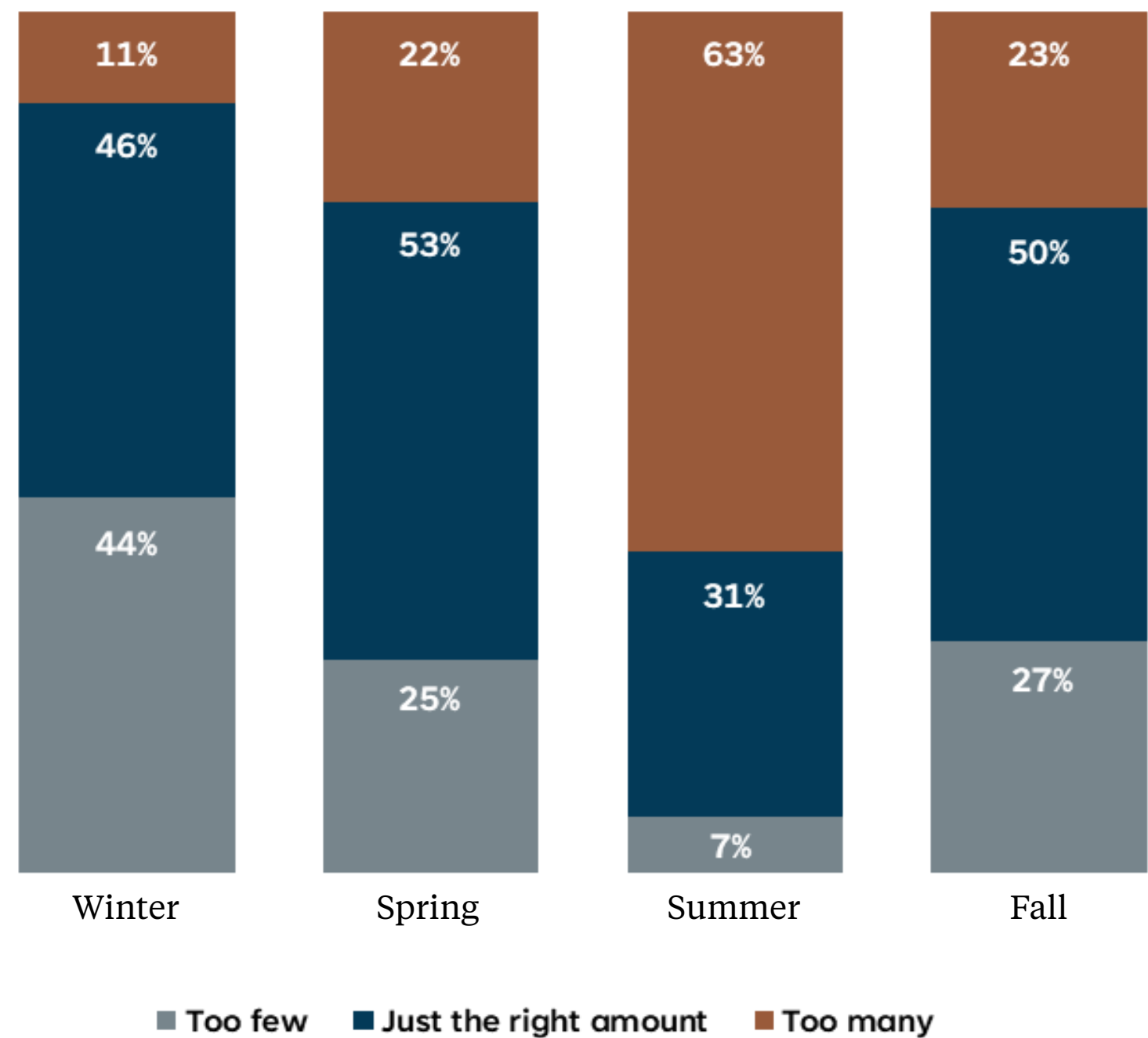
70%

Agree that tourism brings people from diverse cultures and backgrounds.

Residents see tourism as a way to bring visitors from diverse cultures and backgrounds to their community, and they take pride in making these visitors feel welcome. There is a deep sense of value for the region’s appeal. Residents are 11% more likely than the average British Columbian to rank their home as a desirable place to visit.

HIGHLIGHTS

The ideal amount of tourism varies by season.



Seasonal sentiment reflects a clear range in perception of visitor capacity. While 63% of residents report a sense of over-tourism during the summer months, a significant 44% believe the region is under-capacity in the winter.

In contrast, the shoulder seasons (spring and fall) show a notable equilibrium. Perceptions of 'too few' versus 'too many' visitors differ by only $\pm 4\%$, suggesting that current visitation levels during these periods align closely with community expectations.

OVERALL MEASURES

SOUTHERN
GULF
ISLANDS

OVERALL MEASURES

A majority of residents agree that the positive impacts of tourism outweigh the negative and that tourism contributes positively to the quality of life in the islands. However, this is a concerning 17% lower than the provincial average, reflecting a need for better alignment with community well-being.



Overall, tourism contributes positively to the quality of life of my community.



Overall, I believe the positive impacts of tourism in my community outweigh the negative impacts.

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

A close-up photograph of a person's hands holding a woven basket filled with onions. The person is wearing a patterned shirt. The basket contains several onions, including a large yellow one and several smaller red ones. The background is blurred, showing green foliage and a metal bowl.

ECONOMIC IMPACT

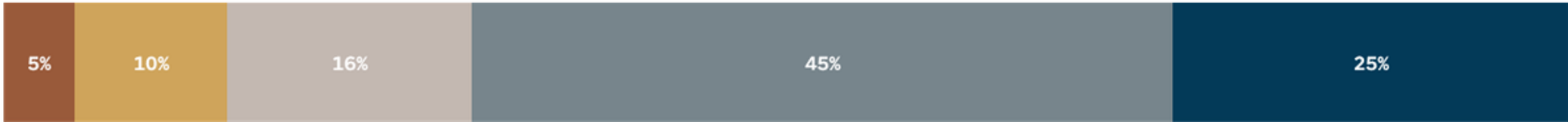
**SOUTHERN
GULF
ISLANDS**

ECONOMIC IMPACT

Residents maintain a high level of awareness regarding tourism’s economic contributions and the necessity of targeted infrastructure investment to sustain the local industry.



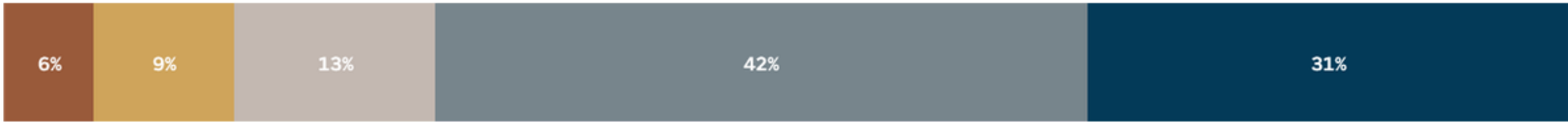
Tourism supports a greater diversity of amenities.



Government investment in developing tourism infrastructure is important.



Tourism supports local businesses in the community.



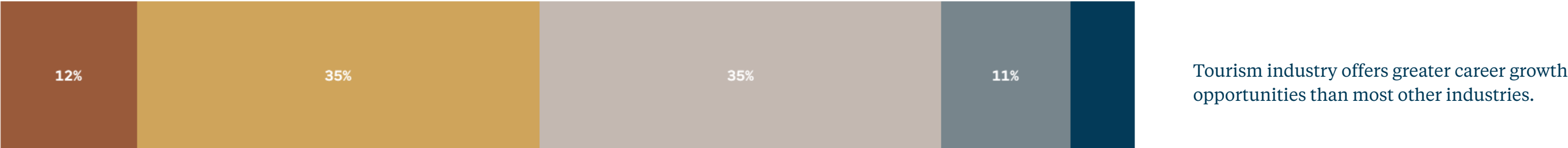
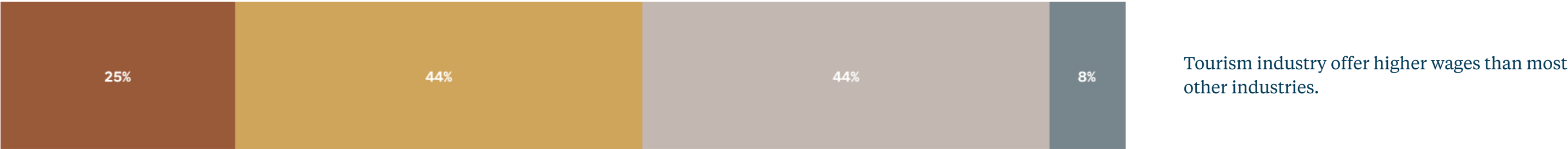
Residents value the contribution visitors make to the local economy.

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree



ECONOMIC IMPACT cont'd

Concerns regarding professional growth are disproportionately high in the region. Residents are 44% more skeptical than the provincial average regarding the tourism sector’s ability to provide competitive wages and long-term careers.



Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

COMMITMENT TO SUSTAINABILITY

**SOUTHERN
GULF
ISLANDS**

COMMITMENT TO SUSTAINABILITY

While most residents do not currently align with the view that tourism is deeply committed to sustainability, this highlights a significant opportunity for the sector to enhance its environmental and social initiatives. A notable strength, however, is the recognition of the industry’s role in supporting and sustaining the viability of other local businesses.



The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes.



The tourism industry contributes to the protection of local oceans, mountains, rivers, airsheds, parks, and beaches.

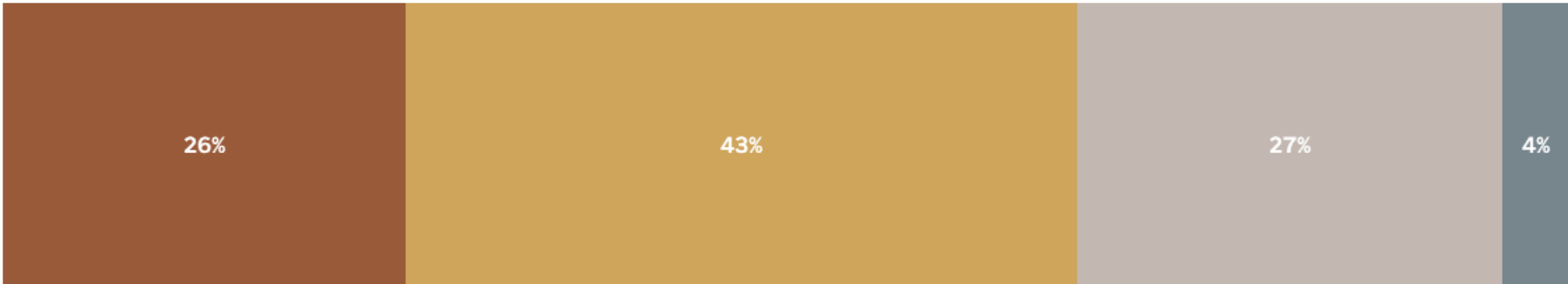


The tourism industry uses more locally produced goods, services and agricultural products than most other industries.

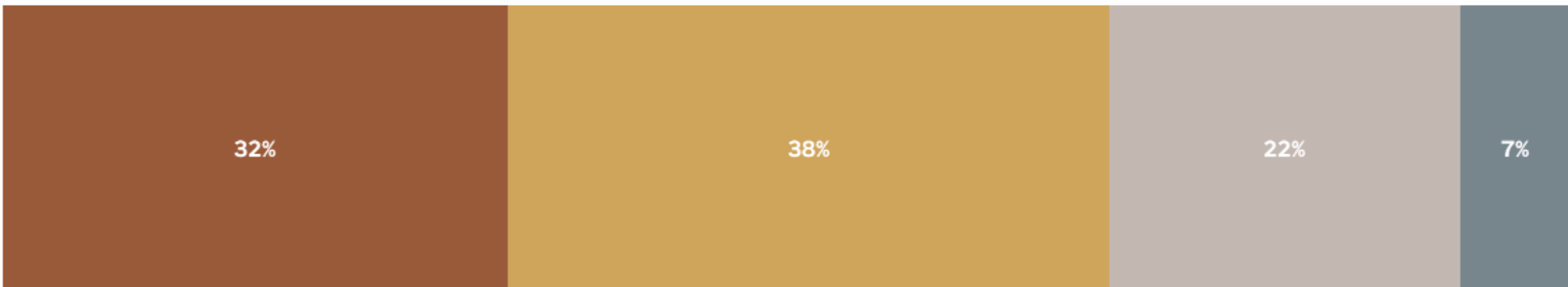
Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree



COMMITMENT TO SUSTAINABILITY cont'd



The tourism industry does more to reduce local carbon emissions than other industries.



The tourism industry does more to reduce waste than other industries.

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

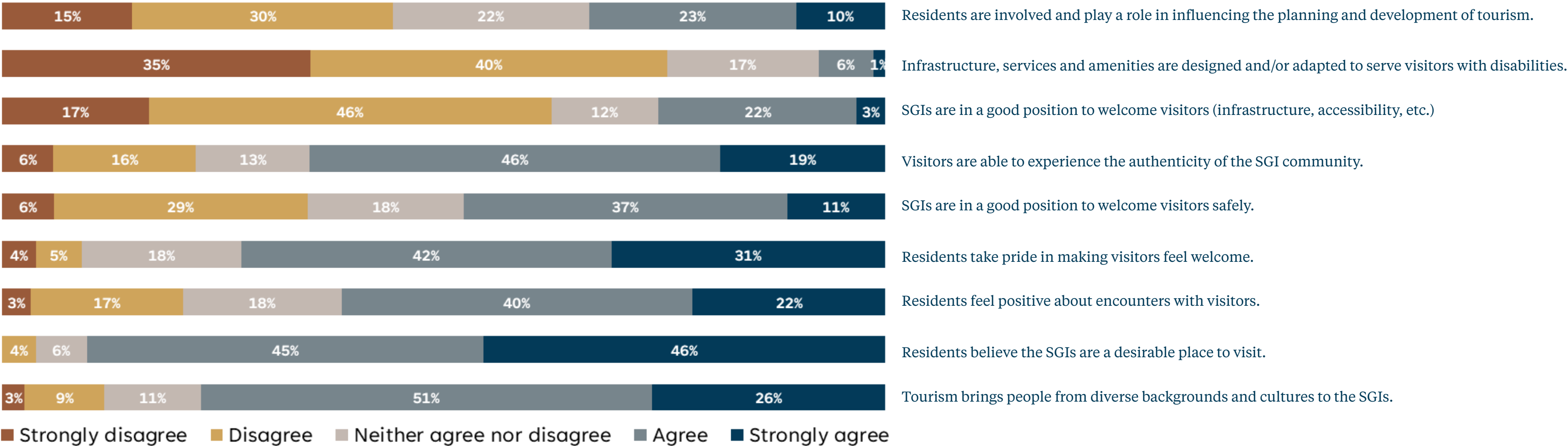
A wide-angle photograph of a rocky coastline. In the foreground, a large, craggy rock formation slopes down towards a sandy beach on the left. Three hikers are standing on the peak of the rock formation, looking out over a calm body of water. The hiker on the left wears a green jacket, the middle one a dark jacket, and the right one a blue jacket. In the background, a bay with many sailboats is visible, along with forested hills under a clear blue sky. The text 'WELCOMING COMMUNITY' is overlaid in white, bold, sans-serif font on the left side of the image.

WELCOMING COMMUNITY

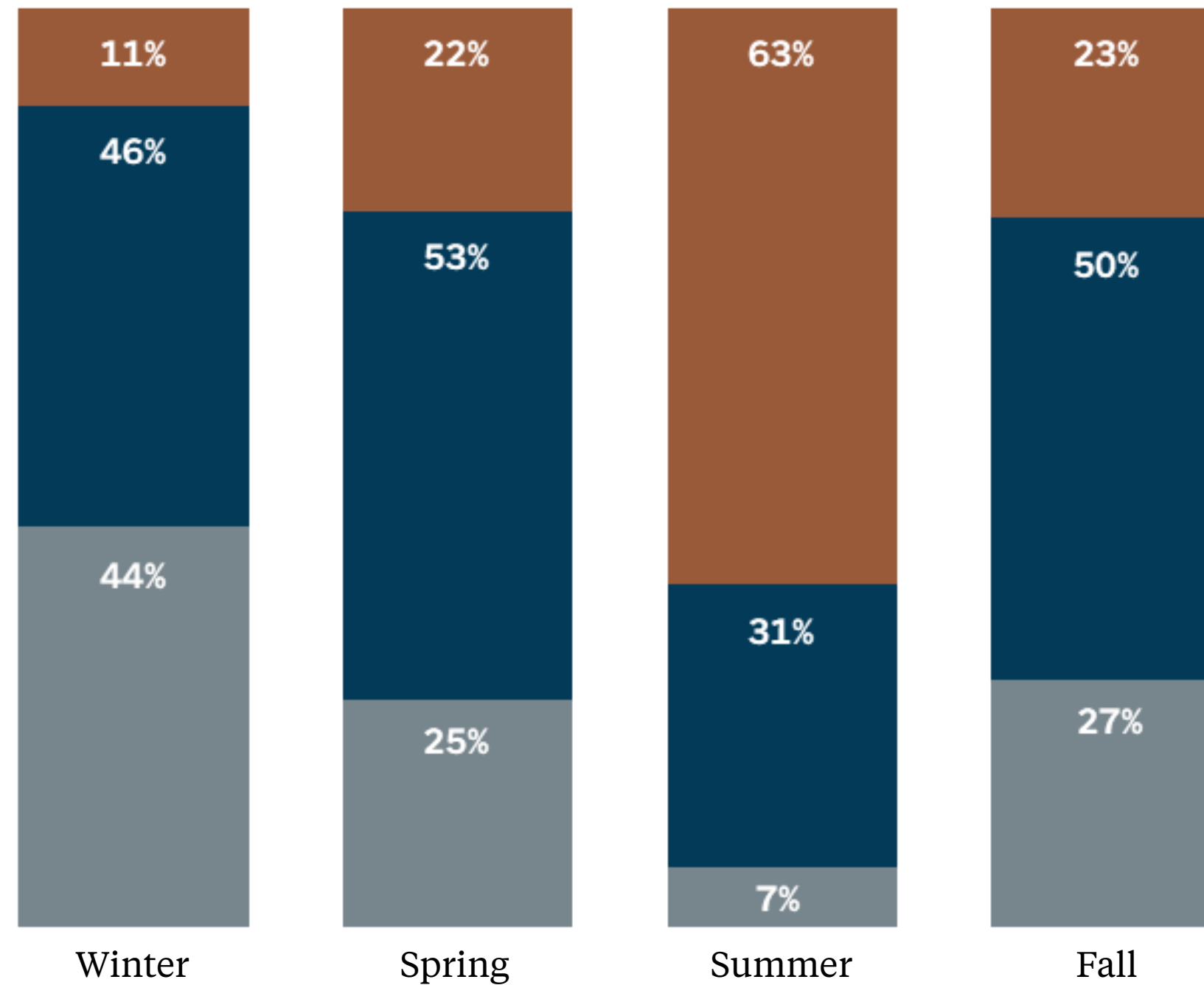
**SOUTHERN
GULF
ISLANDS**

WELCOMING COMMUNITY

While there is a strong local consensus regarding the islands’ desirability and the benefits of visitors, residents identify a clear shortfall in the region’s infrastructure. This lack of confidence is particularly pronounced regarding safety and accessibility.



PERCEPTIONS OF THE AMOUNT OF TOURISM

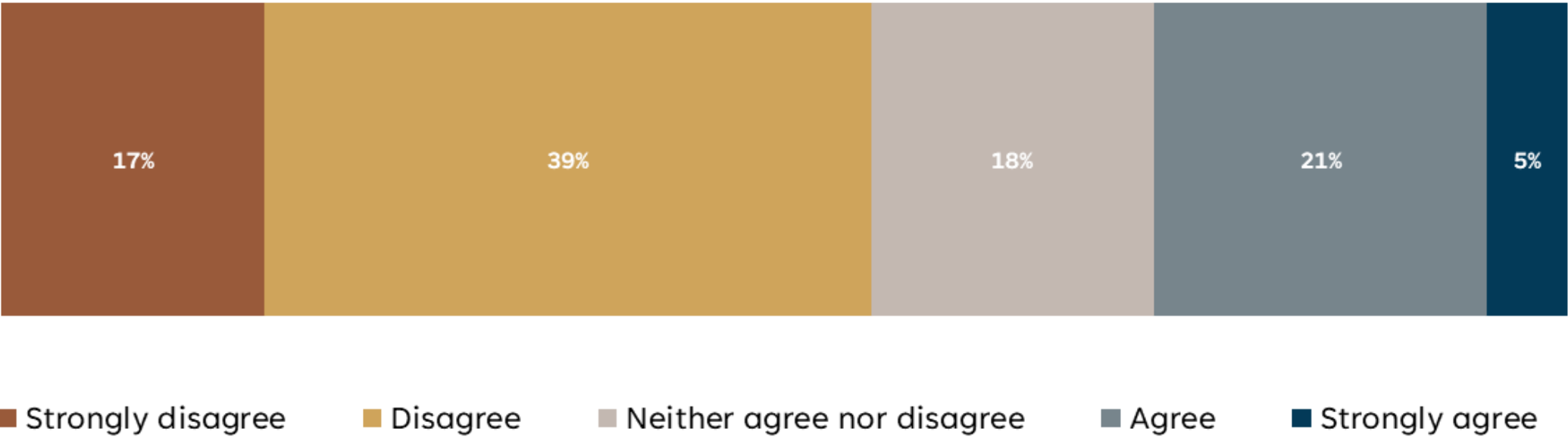


Seasonality is the factor that determines how residents feel about the amount of tourism in their community. Spring and fall clearly emerge as the seasons when the highest percentage of residents feel their community has just the right number of tourists.

Summer perceptions are more stark, with 63% of the community identifying an over-saturation of visitors, there is a clear mandate for strategies that redistribute demand toward the shoulder and off-peak seasons.

PERCEPTIONS OF THE AMOUNT OF TOURISM cont'd

High visitation levels appear to create a barrier to local access. Residents who feel deterred from visiting popular areas when they are busy significantly outnumber those who remain comfortable with the crowds (56% vs. 26%). Notably, this level of comfort is 50% less than the provincial average, suggesting local residents are much more sensitive to crowding than the broader population.



Residents like visiting popular areas (e.g. attractions, parks) even if they might be busy with visitors.

APPENDIX

SOUTHERN
**GULF
ISLANDS**

RESIDENT DEMOGRAPHIC PROFILE

