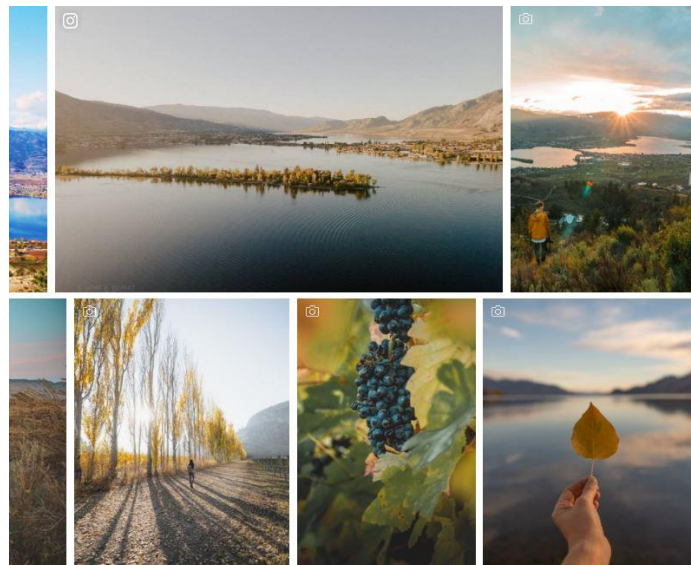


Economic Impact & Value of Tourism in Osoyoos



April 2022

Report by: Larose Research & Strategy

Report commissioned by:

Destination Osoyoos

And funded in part by:

Economic Trust of the Southern Interior (ETSI)

Town of Osoyoos



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Land Use. Tourism. Transport.



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- Osoyoos Indian Band
- Town of Osoyoos
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Town of Osoyoos

**Economic Trust of the
Southern Interior (ETSI)**



Visitor volume and expenditure data were produced by Destination British Columbia.



DISCLAIMER:

The data, information, and evaluations undertaken in the preparation of this report are those of Larose Research & Strategy and do not represent Destination Osoyoos opinions or perspectives. The data and information are estimates only, produced to assist with destination marketing, policy, planning, and development. While professional best practices were used to develop this report, neither Destination Osoyoos nor Larose Research & Strategy are liable for any actions or decisions stemming directly or indirectly from the contents of this report.

ABOUT LAROSE RESEARCH & STRATEGY

Larose Research & Strategy is a Kamloops-based consultancy that specializes in research, planning, and evaluation for British Columbia tourism industry sectors and destinations, and provides strategic research and advisory services to all levels of government (federal, provincial, local, Indigenous). Its Principal, Peter Larose, has more than 20 years of experience in the fields of adventure tourism, Indigenous tourism, outdoor recreation, natural resource management, sustainable / regenerative tourism, community planning and evaluation, labour market analysis, economic impact analysis, and tourism transportation systems planning. For more information visit www.laroseresearch.com.

Peter Larose is a University Instructor at Thompson Rivers University in Kamloops, teaching senior undergraduate courses in tourism research methods, sustainable tourism planning, tourism experience management, tourism & technology, agritourism & soft adventure tourism, adventure tourism marketing, and fundraising for non-profits. He is also the co-founder of Cedar Haven Resort in Clearwater. www.cedarhavenresort.com

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EXECUTIVE SUMMARY and KEY FINDINGS

In June 2021 Destination Osoyoos commissioned Larose Research & Strategy to undertake a comprehensive and independent evaluation of the size, composition, and characteristics of the tourism industry in Osoyoos. A study of this nature had not been conducted in the past.

The study includes the following components:

1. **Economic Impact Estimates** - tourism visitation volumes (overnight and same-day), direct tourist expenditures, induced and indirect economic impacts, direct tax revenues, and employment.
2. **Visitor Intercept Survey** – visitor motivations for travel to Osoyoos, activities undertaken, satisfaction with trip components, trip characteristics, and visitor characteristics.
3. **Resident Survey** – perceptions of Osoyoos residents regarding the importance of tourism, its positive impacts on the community, and perceived negative aspects of tourism on local quality of life.
4. **Executive Panel** - review and analysis of key findings, including recommendations to enhance the resiliency of the local tourism industry and ways to improve the industry's impact on local quality of life.

Destination B.C.'s Value of Tourism model was used to estimate visitor volumes and direct tourism revenues for 2020. The primary data source for these estimates is commercial accommodation statistics in the study area. An accommodations questionnaire gathered data from local hotels and motels. Destination B.C.'s Research, Planning and Evaluation team then worked with Larose Research & Strategy to evaluate data modelling parameters, to gather and evaluate relevant statistics from key accommodation businesses, and to generate a conservative estimate of visitor volumes and direct tourism expenditures in Osoyoos, broken down by key visitor segments.

Additional economic impacts were also estimated by Larose Research & Strategy using Statistics Canada's Provincial-Territorial Input-Output Model (2015). These impact measures include total economic impacts (direct, indirect, induced, total), tourism-related employment, and tourism-derived tax revenues.

The Value of Tourism results are significant because they quantify an important source of economic activity in the region, which have never been estimated previously. The results of this project provide a significant contribution to the understanding of the local tourism industry characteristics, its economic value, and how tourism stakeholders, residents, and governments can ensure positive visitor and local resident experiences with tourism in one of the most remarkable tourism destinations in the world: Osoyoos, British Columbia.

SUMMARY of RESULTS

Number of Visitors

There were an estimated 301,000 visitors to Osoyoos in 2020, with nearly twice as many overnight visitors (193,000) as day visitors (108,000) who visit the community as an intentional destination for at least a half-day.

Osoyoos is generally a long-stay destination, with an average length of stay of more than one week. The community's many vacation rentals, resorts, hotels, motels, and B&Bs in the region target longer-stay visitors. The region's well-known campgrounds and RV parks also enjoy many longer-stay visitors who are frequent seasonal returnees – almost seasonal residents. The result of this is that the economic impact per visitor is significantly higher than the majority of other B.C. communities.

Visitor Expenditures

The 301,000 visitors spent \$174 million in the community in 2020. The vast majority of this spending (94%) was from independent leisure travellers. This high proportion of leisure spending was due in part to COVID-19 restrictions on large-scale gatherings, but is generally believed to be a characteristic of the destination regardless of COVID-19.

Expenditure segments are as follows:

- **Leisure: \$163 million**
- **Business: \$1.1 million**
- **Visiting Friends and Relatives (VFR): \$2.9 million**
- **Day Visitors: \$7.1 million**
- **TOTAL: \$174 million**

Total Economic Impacts

The total economic impact of tourist¹ expenditures in Osoyoos was \$264 million in 2020. Approximately half of this economic impact was from the accommodation sector. See Table A, below.

Table A: Total Economic Impacts of Tourism in Osoyoos

INDUSTRY	Direct Output	Multiplier (B.C.)	Total Output
Accommodation	\$76,199,760.00	1.71	\$130,301,589.60
Food & Beverage	\$28,888,920.00	1.71	\$49,400,053.20
Retail	\$24,562,560.00	1.78	\$43,721,356.80
Guided / Other Services	\$22,713,390.00	1.78	\$40,429,834.20
TOTAL	\$152,000,000.00		\$264,000,000.00

¹ For the purposes of this report, the terms "tourist" and "visitor" are used interchangeably, and a non-resident of the Osoyoos, and typically will travel a minimum of 80 km for purposes of business or pleasure.

Tax Revenues

The \$174 million in annual visitor spending in Osoyoos produced \$41 million in taxes to three levels of government. The provincial government received nearly half of these taxes. See Table B, below.

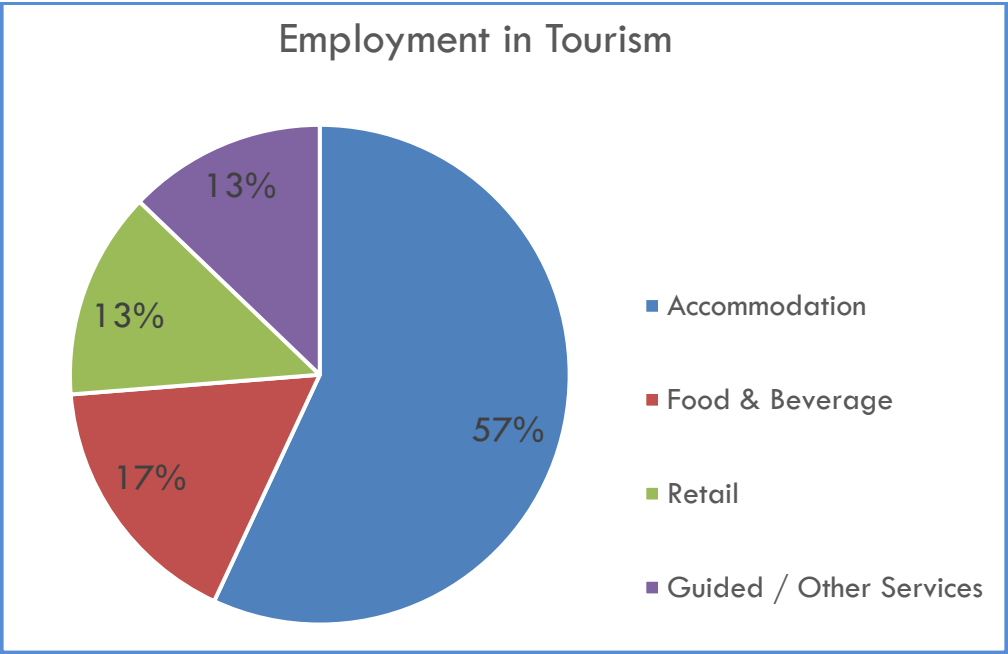
Table B: Tax Revenues (Federal, Provincial, Local)

INDUSTRY GROUP	Taxes Generated	% of Total Taxes
Federal Tax Revenues	\$19 Million	45%
Provincial Tax Revenues	\$20 Million	49%
Local Government Tax Revenues	\$2.5 Million	6%
TOTAL TAXES:	\$41 Million	100%

Employment

Tourism directly employed approximately 650 people in Osoyoos in 2020, which accounts for roughly one-third of the employment in the community. This does not include indirect employment impacts of tourism in sectors like finance, construction, and real estate, despite these sectors being heavily dependent on tourism business and employee spending in the local economy. See Figure A, below.

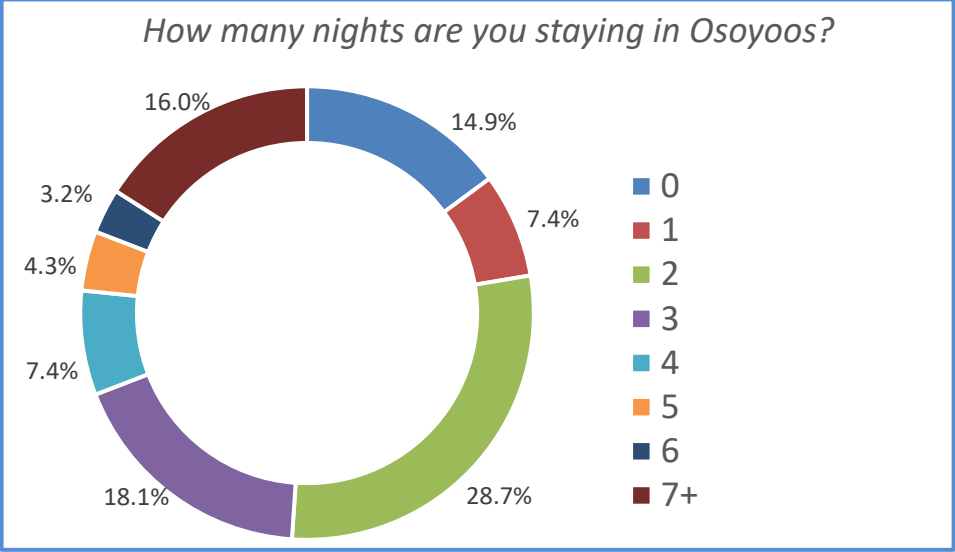
Figure A: Direct Tourism Employment in Osoyoos (2020)



Visitor Duration in Osoyoos

Osoyoos is a long-stay destination with an average length-of-stay that is approximately double that of the average for communities in B.C. Approximately one-quarter of visitors are staying in the destination for at least five (5) nights. See Figure C, below.

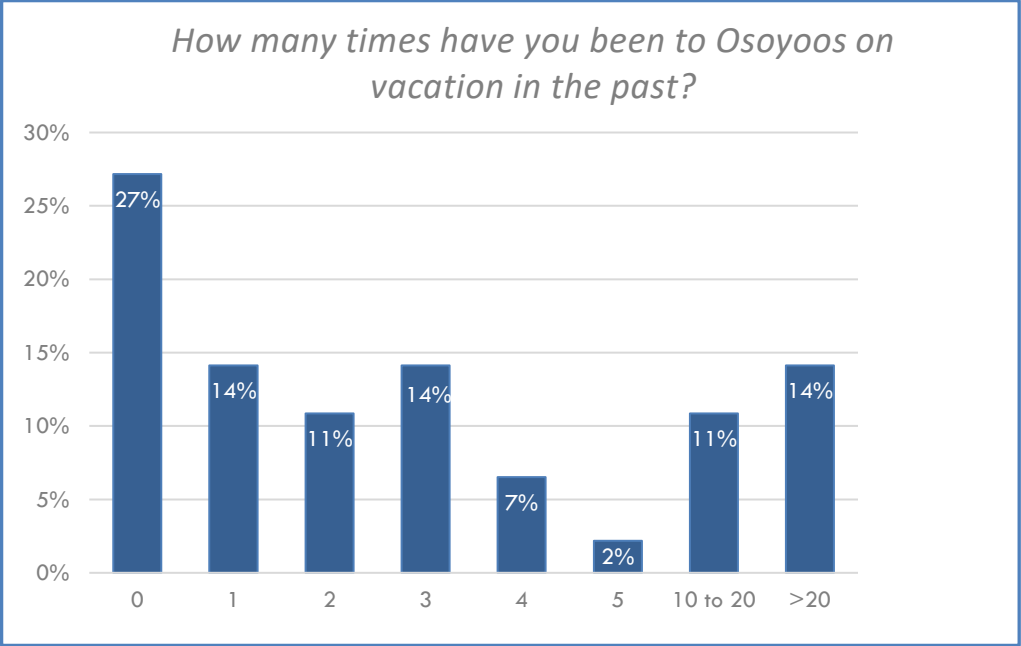
Figure C: Number of Nights in Osoyoos



Repeat Visits

Osoyoos has a high proportion of frequent return visitors, with more than one-quarter of visitors having been to Osoyoos at least ten times previously. See Figure D, below.

Figure D: Number of Repeat Visits to Osoyoos

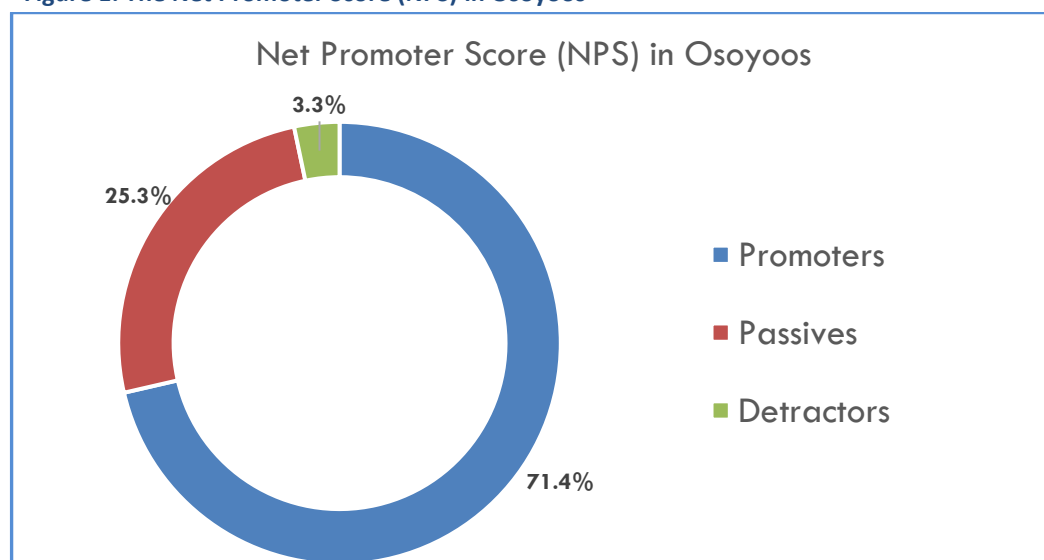


Visitor Satisfaction / Net Promoter Score

A Net Promoter Score (NPS) was calculated to identify whether tourists were likely to recommend Osoyoos as a travel destination to a friend or a colleague. This is one of the primary metrics used by Destination BC, communities / destinations, and tourism sectors to determine the likelihood that a visitor will recommend the tourism destination or experience. The NPS ranges from a possible negative score of -100 to a possible positive score of +100. The NPS for Osoyoos is very high for a B.C. community, at 68.

Put another way, for each visitor who is a “detractor” (i.e., likely to tell a friend or colleague to not visit Osoyoos), there are 27 “promoters” (likely to recommend a visit to Osoyoos). This is an extremely positive result. See Figure E, below.

Figure E: The Net Promoter Score (NPS) in Osoyoos



Indigenous Experiences

Visitors are generally motivated to visit Osoyoos, in part, to participate in Indigenous cultural experiences. However, the destination’s Indigenous experiences only have a moderate level of satisfaction among visitors. This suggests that Osoyoos should expand and diversify its Indigenous experiences, while making current experiences more authentic and appealing to visitors.

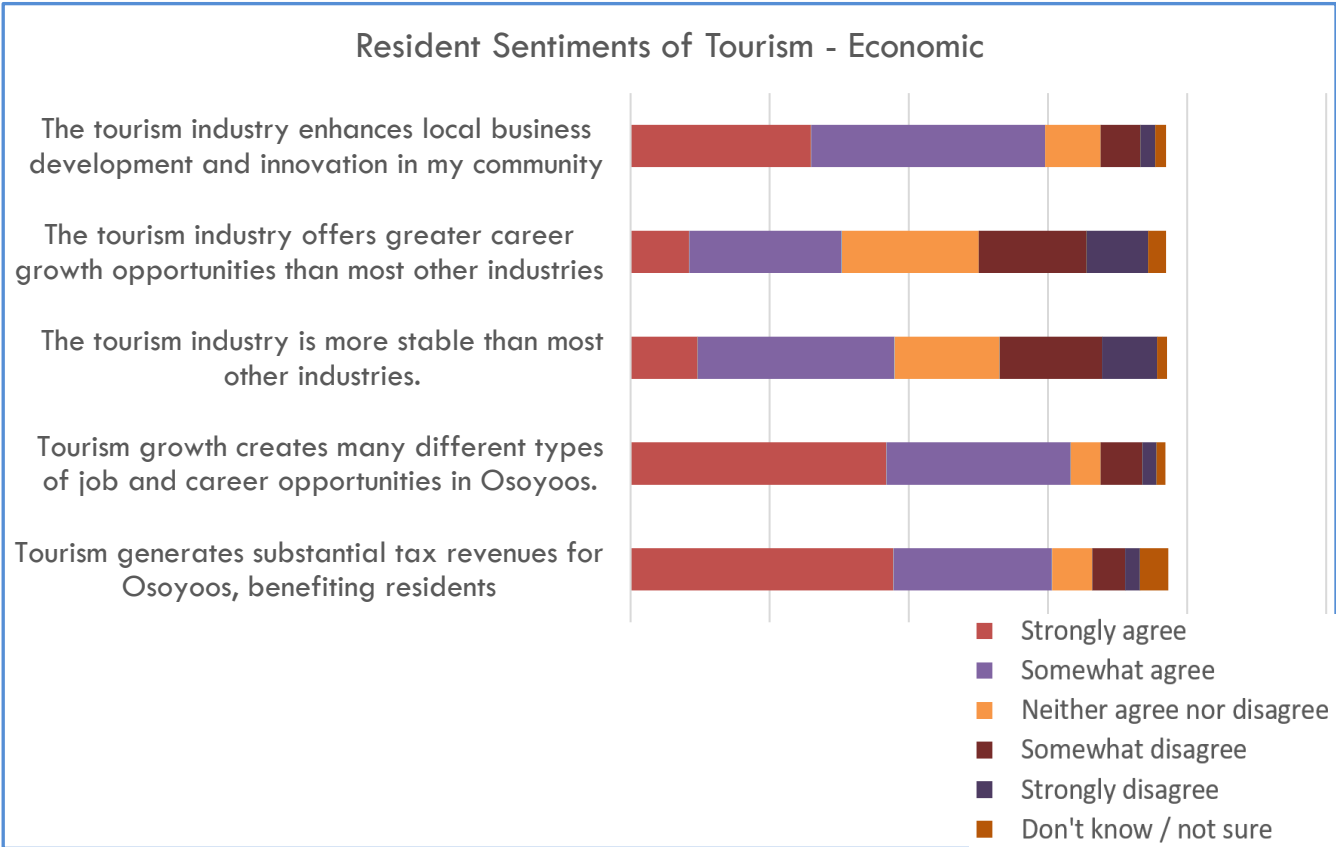
Additionally, visitors who have undertaken an Indigenous cultural experience are much more likely to recommend Osoyoos as a travel destination (NPS=85) than visitors who do not engage in an Indigenous cultural experience (NPS=58). This suggests that Indigenous experiences are crucial for the destination to diversify and differentiate itself from its competitors, near and far.

Resident Perceptions of Tourism

This study included one of the largest-ever analyses of resident perceptions of tourism for any B.C. community, with 840 residents providing their perceptions of the positive and negative aspects of tourism on the local quality of life, economy, and the environment.

Residents believe that tourism produces significant economic opportunities and taxes, and enhances local innovation. However, they also believe that tourism provides fewer career growth opportunities than other sectors, and that tourism is less stable than other industries. See Figure F, below.

Figure F: Resident Perceptions of Tourism and the Economy

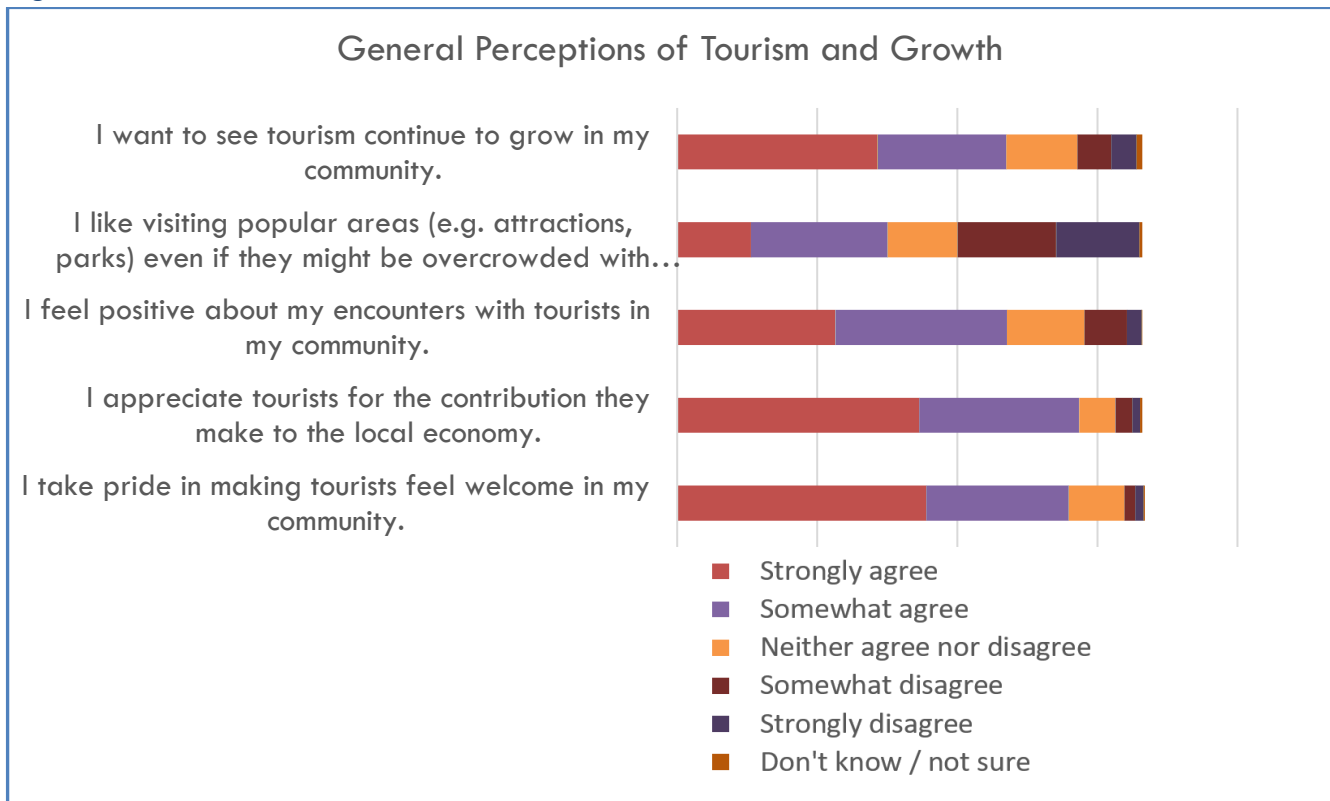


Interactions with Tourism / Tourists and Desire for Growth

Residents of Osoyoos generally appreciate the contributions that tourists make to their community, and wish for the sector to continue growing. However, they also express concerns about visiting crowded places during the peak tourist season, and approximately one-quarter indicated that they will not visit these places when they are busy.

See Figure G, below.

Figure G: Tourist Interactions and Desire for Growth



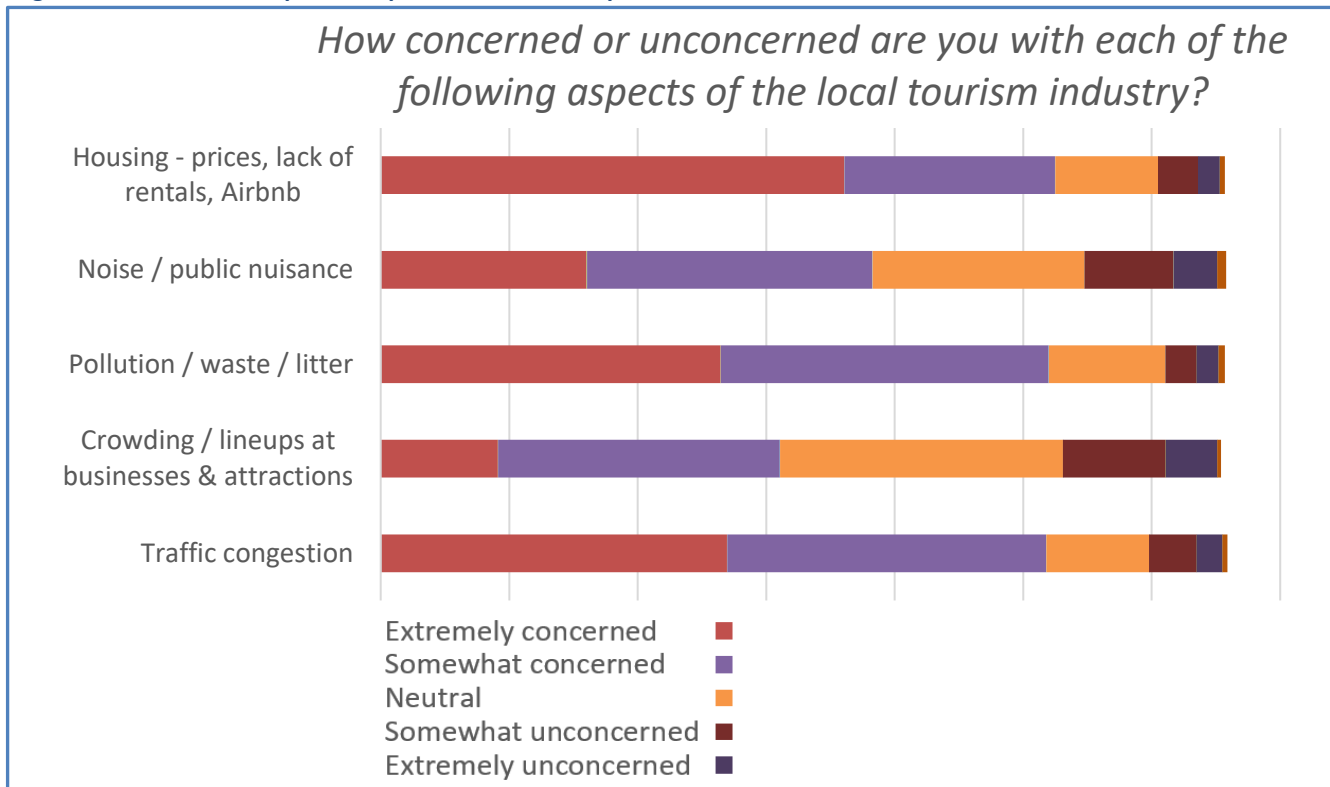
Concern about Specific Aspects of Tourism

Residents were asked about their concerns about specific aspects of tourism, such as the availability and affordability of housing, noise/public nuisance, crowding, pollution, and traffic congestion.

There are three main areas where residents expressed the most concern regarding the local tourism industry: housing, pollution, and traffic congestion. For these issues, approximately 80% of residents were extremely or somewhat concerned, while only 7-8% of residents were extremely or somewhat unconcerned.

See Figure H, below.

Figure H: Concern with Specific Aspects of Tourism Impacts



1. REPORT OVERVIEW

1.0 BACKGROUND and CONTEXT

This section summarizes the purpose and objectives of the report, and provides an overview of the context of tourism in the region.

1.1 Report Purpose

The purpose of this report is to develop reliable estimates of the value and economic impact of the Osoyoos tourism sector, as well as undertake a first-ever strategic assessment of both visitors and resident perceptions about various aspects of the industry.

Section 2 of the report provides estimates of the value of tourism, including the following components:

- ◎ Same day and overnight visitor volumes
- ◎ Direct visitor expenditures
- ◎ Total economic impacts (direct, indirect, induced)
- ◎ Employment in tourism
- ◎ Tax revenues

1.2 ABOUT the REGION

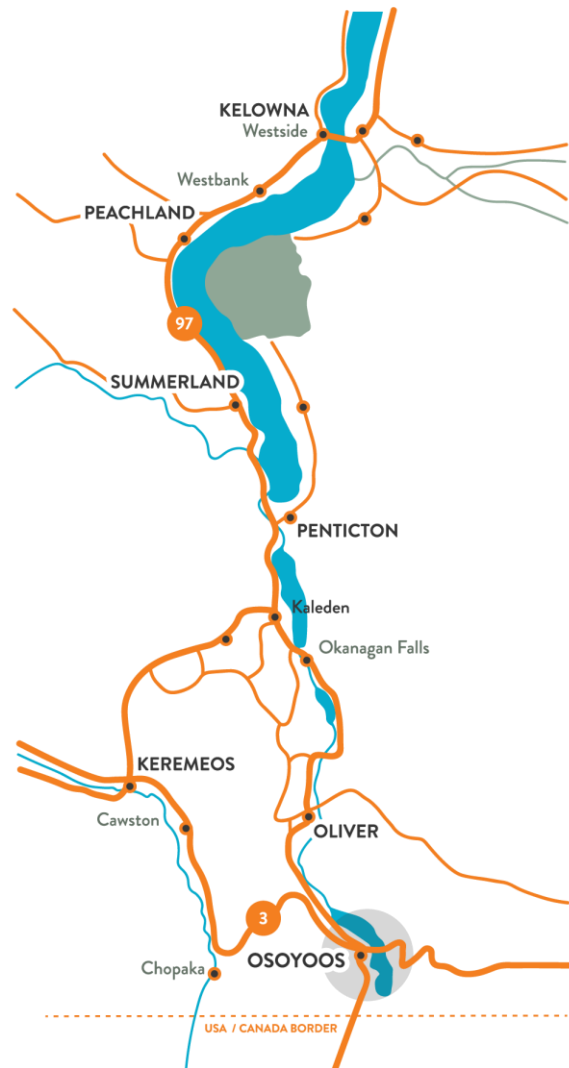
Osoyoos is a mature tourism destination that has a variety of natural attractions and facilities that are export-ready.

The region's tourism industry is highly seasonal for a community in British Columbia, with approximately two-thirds of visitation occurring from July 1 – September 30.

This report on the value and context of tourism in Osoyoos is an ambitious undertaking that combines quantitative data on the with perspectives and opinions of residents, tourism stakeholders, and visitors. The report has four main components:

1. **Economic Impacts and Value of Tourism** - including tourism visitor volumes, direct spending, and economic impact multipliers (direct and indirect economic impacts, total economic impacts, and high-level estimates of jobs and tax revenues generated by tourism).
2. **Osoyoos Visitor Analysis** – motivations and perceptions of visitors, based on a stratified random intercept survey² of visitors at key locations throughout Osoyoos.
3. **Resident Perceptions of Tourism** – online survey of local residents on the role and value of tourism to the local community, economy, and environment.
4. **Strategic Directions and Considerations** – based on Executive Panel interviews with local tourism leaders and partners.

Figure 1: Osoyoos Town Limits



² The visitor survey was to be conducted during the summer and fall of 2021, however the conducting of the survey was limited due to the presence of wildfires within close proximity of the community, as well as COVID-19 restrictions that hampered normal tourist visitation and patterns. As a result, the survey results are limited, with approximately 80-90 responses to most questions, and therefore the results should be considered “directional” in nature and treated with some caution.

This first-ever comprehensive evaluation of tourism in Osoyoos combines the perspectives of visitors, residents, tourism managers, and the industry, itself with reliable data on tourist volumes and economic impacts.

The analysis is also buttressed by relevant findings from the Fall 2021 Destination Osoyoos Stakeholder Survey which provides insights into the role and value of Destination Osoyoos as the statutory (legally-authorized) tourism management body in the community.

1.3 Summary of Methodology

This study uses a mixed methods approach to analyzing a variety of elements related to the value, economic impacts, and perceptions of tourism in Osoyoos by visitors and residents. The following is a high-level summary of the different research methods utilized. Details are provided in each relevant section of the report.

- **Visitor Volumes and Direct Expenditures:** Destination B.C.'s Value of Tourism Input-Output Model was used to estimate visitor volumes and direct visitor expenditures (same day and overnight). This was conducted utilizing accommodation data as well as travel volumes through the region captured by mobile device location data.
- **Additional Economic Impacts:** Statistics Canada Provincial-Territorial Input-Output Model (2015)³ was used to estimate indirect, induced, and total economic impacts.
- **Employment:** Employment was derived from the Statistics Canada Census of Population (2016)⁴ for accommodations, and the Statistics Canada Provincial-Territorial Input-Output Model (2015) was used to derive ratios for other tourism industry groups relative to accommodations.
- **Tax Revenues:** Data were derived from Statistics Canada, "Government Revenues Attributable to Tourism, 2011." Catalogue no. 13-604-M-No. 71. Tax ratios were updated based on changes to GST, PST, and HST from 2011 – 2022. Adjustments were also made due to the higher proportion of accommodation revenues in Osoyoos relative to other jurisdictions.
- **Visitor Analysis:** Conducted as visitor intercepts at random, pre-determined locations throughout the town. Data were manually uploaded to Survey Monkey™ for coding and analysis. Descriptive statistics and content analysis were conducted to analyze the data.

³ Statistics Canada, Input-Output Model Simulations (Interprovincial Model), 2015, 15F0009X2019001, release date April 4, 2019. <https://www150.statcan.gc.ca/n1/en/catalogue/15F0009X2019001>

⁴ Accessed via <https://townfolio.co/bc/osoyoos/labour-force> (accessed April 8, 2022).

- **Resident Perceptions Survey:** The survey instrument was derived from Destination BC's Resident Perceptions of Tourism panel survey, with some modifications, and additional questions were added based on local issues and needs that were identified by Destination Osoyoos. The survey was conducted online via Survey Monkey™ and as a purposive intercept survey at strategic locations throughout the town. Survey promotion was conducted via the Destination Osoyoos social media channels, the Town of Osoyoos, and tourism partners in the region.
- **Executive Panel Interviews and Analysis:** Videoconferences were held with senior leaders in the Osoyoos tourism industry to review report findings and identify strategic considerations. Semi-structured interviews were conducted and key themes were identified using content analysis. A summary meeting was facilitated with the Destination Osoyoos Board of Directors to complete this process.

2. ECONOMIC IMPACT of TOURISM in OSOYOOS

2.1 About Economic Impacts Analysis

Economic impact analysis is used to evaluate any type of economic activity, whether a specific project, program, or virtually any type of activity that creates or reduces economic value. In this report the following tourism-related economic impacts were estimated:

- **Direct tourist expenditures:** in-market tourist expenditures, including both same-day and overnight travellers. Travellers who stop in Osoyoos for a short stay (e.g., refuelling, purchasing a meal) are not considered same-day travellers.);
- **Indirect economic impacts:** expenditures by tourism businesses on business inputs, such as a hotel purchasing financial services and insurance, or commodities such as beds, televisions, etc.);
- **Induced economic impacts:** expenditures by tourism employees in the local economy, on items such as food, entertainment, housing, etc.;
- **Employment:** the number of individual people employed directly in tourism; and
- **Tax Revenues:** The total amount of direct taxation revenue resulting from i) Tourist consumer taxes; ii) Business income taxes; iii) Employee income taxes; and iv) Other fees/surcharges/taxes.

Estimating tax revenue attributable to tourism activity is challenging due to the multiple and varying layers of business taxes (income tax, property tax, payroll tax), employee income taxes, and tourist consumer taxes (GST/PST, municipal parking, and various other fees, levies, and surcharges. The tax revenues attributable to tourism in this study are therefore only initial, high-level estimates, based on national average tax revenues associated with tourism and cross-referenced with studies conducted in comparator destinations within B.C. in the past five (5) years.

2.2 Estimating Tourist Expenditures by Industry

Tourists make expenditures on a variety of travel-related goods and services, including accommodations, food and beverage, transportation, retail items, and other services.

Expenditures by individual industries were estimated through a combination of the following:

- Destination B.C. Value of Tourism Input-Output Model Parameters;
- Destination B.C.'s Value of Tourism estimates for tourism industry groups in B.C.⁵;
- Activity participation rates as stated in this report's Visitor Survey;
- Benchmarks with comparator destinations (communities) in British Columbia; and

⁵ Destination BC, "Value of Tourism – 10 Year Trend Data Tables: 2010-2020.

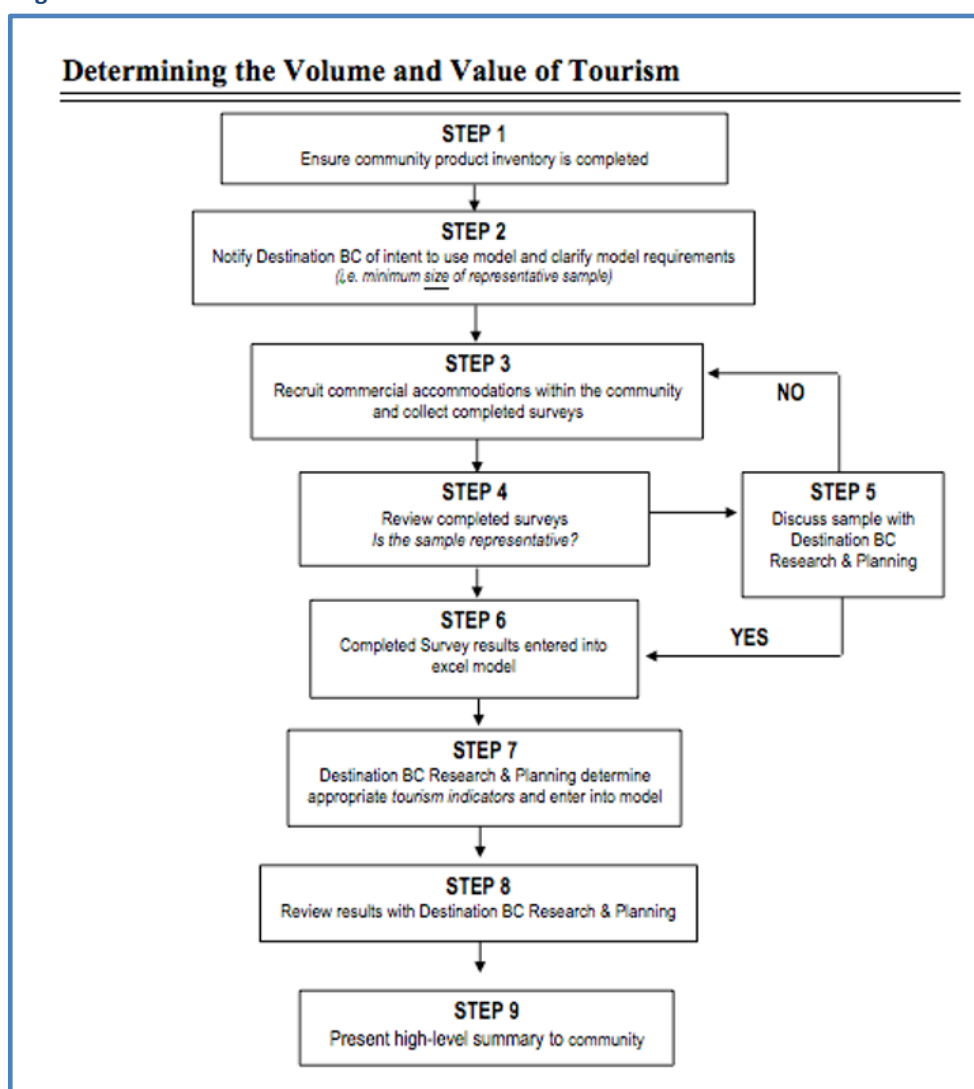
https://www.destinationbc.ca/content/uploads/2022/03/DBC-2020-Value-of-Tourism-Data-Tables_10-Year-Trend.xlsx

- Proprietary economic impact analyses conducted previously by Larose Research & Strategy (six prior studies/communities in B.C.).

2.3 Destination BC's Value of Tourism Model (Input-Output)

Destination BC's Value of Tourism Model has been used by dozens of communities in British Columbia for more than 20 years to estimate the number of visitors and spending. The model estimates overnight and day visitor volumes using information provided by the region's accommodation sector as a primary input, as well as various parameters in the model, itself that convert visitor volumes, their characteristics, and known spending patterns and relationships amongst expenditure categories. See Figure 2, below.

Figure 2: Destination BC Value of Tourism Model



2.4 Visitor Volume and Direct Expenditure Estimates

For calendar year 2020, Osoyoos welcomed over 300,000 visitors, including 193,000 overnight visitors and 108,000 day visitors. See Figure 3, below.

Figure 3: Destination BC Estimates of Visitor Volumes by Type and Direct Expenditures

Estimates of Visitors			
Type of Visitor	Volume of visitors		
Fixed Roof (Hotels, Motels, B&B, STR)			
Leisure	146,600		
Business	4,000		
RV & Campground	29,900		
Total Visitors in Commercial Accommodations	180,500		
Visiting Friends & Relatives (VFR)	12,700		
Day Visitors	107,900		
Overall Visitation	301,100		

Estimates of Direct Visitor Expenditures			
Type of Visitor	# Visitors	Average total spend (\$) per visitor per trip	Totals (\$)
Leisure (commercial accommodation)	176,500	\$930	\$163,360,000
Business	4,000	\$280	\$1,130,000
Visiting Friends & Relatives (VFR)	12,700	\$230	\$2,880,000
Day Visitors	107,900	\$70	\$7,080,000
Annual Direct Visitor Expenditures			\$174,450,000

There are two notable trends apparent in the data for Osoyoos that should be taken into consideration when managing and marketing the destination:

- ③ Nearly two-thirds of the visitors to Osoyoos are overnight visitors, which produce greater economic impact than day-visitors. Overnight visitors also tend to engage in more tourism activities than same-day visitors, are more likely to engage in activities related to sustainable / regenerative travel than day visitors, and are more willing to pay for sustainable products and services. This is a positive outcome that should be supported.
- ③ The tourism economy in Osoyoos is almost entirely overnight and leisure-based (94% of spending) while the segments for Business, Visiting Friends and Relatives, and Day Visitors constitute only 6% of total spending in the community.

2.5 Comparisons with other B.C. Communities

As mentioned above, the Destination BC Value of Tourism Model has been run for several communities in B.C. in the past five years. Studies for Osoyoos, Kamloops, and Vancouver's North Shore were all conducted by Larose Research & Strategy, using similar econometric methods and therefore are highly comparable with this current study for Osoyoos. See Table 1, below.

Table 1: Summary Visitation and Economic Impacts for Destinations within B.C.

	Day Visitors	Overnight Visitors	Total Expenditures	Total Economic Impacts
Osoyoos (2020)	107,900	193,000	\$174 Million	\$274 Million
Kamloops (2019)	810,000	990,000	\$270 Million	\$449 Million
Tofino (2018)	76,000	600,000	\$295 Million	\$400 Million
Vancouver's North Shore (2019)	1,400,000	570,000	\$355 Million	\$568 Million

The most notable trend when comparing the Value of Tourism headline statistics for Osoyoos with those from other communities in B.C. is the higher expenditures in Osoyoos relative to visitation levels.

The higher relative expenditures per traveller is primarily due to two factors: i) The high proportion of overnight visitors in Osoyoos compared to same-day visitors in the region (only Tofino has a higher proportion of overnight-to-day visitors); and, ii) The significantly longer average-length-of-stay in Osoyoos compared with other destinations, primarily due to the high proportion of vacation rentals (individual homes, condos/townhouses, and long-stay-oriented motels, hotels, and campgrounds). Osoyoos is a very popular destination for longer-stays, with many vacation rental properties only offering weekly availability and rates, whereas the region's campgrounds are popular with longer-stay RV / camper travellers.

It should be noted, however, that any stays longer than one month are not included in the tourism estimates as these are considered seasonal residents.

2.6 Total Economic Impacts Analysis

The following tourism-related economic impacts were estimated:

- Direct business revenues: in-market tourist expenditures, minus consumption taxes (also known as “direct economic output”);
- Indirect economic impacts: expenditures by tourism businesses on business inputs, such as a hotel purchasing financial services and insurance, or physical assets such as beds, televisions, etc.);
- Induced economic impacts: expenditures by tourism employees in the local economy, on items such as food, entertainment, housing, etc.;
- Employment: the number of individual people employed for any period of time in the year; and
- Tax Revenues: the total amount of direct taxation revenue resulting from i) tourist consumer taxes; ii) business income taxes; iii) Employee income taxes; and iv) other fees/surcharges/taxes.

Estimating tax revenue attributable to tourism activity is challenging due to the multiple and varying layers of business taxes (income tax, property tax, payroll tax), employee income taxes, and tourist consumer taxes (GST/PST, municipal parking, and various other fees, levies, and surcharges. The tax revenues attributable to tourism in this study are therefore summary estimates, based on a combination of national average tax revenues associated with tourism, and evaluation of comparator studies of other tourism destinations (communities) in B.C.

2.7 Estimating Tourist Expenditures by Industry

Tourists make expenditures on a variety of travel-related goods and services, including accommodations, food and beverage, transportation, retail items, and other services.

Expenditures by individual industries were estimated through a combination of the following:

- Destination B.C.’s Value of Tourism estimates for tourism industry groups in B.C.⁶;
- Activity participation rates as stated in this report’s Visitor Survey;
- Destination B.C. Value of Tourism Input-Output Model Parameters;
- Benchmarks with comparator destinations in British Columbia; and
- Proprietary Economic Impact Analyses conducted previously by Larose Research & Strategy.

Table 2 (below) summarizes visitor expenditures at the industry group level for Osoyoos.

⁶ Destination BC, “Value of Tourism – 10 Year Trend Data Tables: 2010-2020.

https://www.destinationbc.ca/content/uploads/2022/03/DBC-2020-Value-of-Tourism-Data-Tables_10-Year-Trend.xlsx

Table 2: Osoyoos Tourist Expenditure Proportions and Amounts by Industry Group

Industry Group	Proportion	Expenditure
Accommodation	52.0%	\$91,000,000
Food & Beverage	18.0%	\$31,000,000
Retail	16.0%	\$28,000,000
Guided / Other Services	14.0%	\$24,000,000
TOTAL	100.0%	\$174,000,000

2.8 Converting Expenditures to Output

Visitor expenditures must be converted to economic output to be used by Statistics Canada's Input/Output model to determine total economic impacts. In a tourism context, economic output can be estimated by removing consumption taxes from total visitor expenditures.

The following average consumer tax rates are applied to each expenditure category:

- Accommodations: 16% tax; Direct Output = \$76 Million
- Food & Beverage: 8% (combined food and liquor) tax; Direct Output = \$29 Million
 - Retail: 12% tax; Direct Output = \$25 Million
- Guided / Other services: 7% tax; Direct Output = \$23 Million

Total Direct Economic Output: \$152 Million

2.9 Applying Statistics Canada I/O Model Multipliers

Statistics Canada maintains an updated Input/Output model for each province and territory in Canada, assisting with the estimation of total economic impacts and specific impact categories once total output is established. The following table summarizes the multipliers that are used and includes the final estimates for Total Economic Output from tourism for Osoyoos, based on the Statistics Canada (2015) Input-Output Model.

Table 3: Total Economic Impacts of Tourist Expenditures in Osoyoos

INDUSTRY GROUP	Direct Output	Multiplier Code	Total Output Multiplier	Total Output
Accommodation	\$76 Million	BS72000	1.71	\$130 Million
Food & Beverage	\$29 Million	BS48B00	1.71	\$49 Million
Retail	\$25 Million	BS4A000	1.78	\$44 Million
Guided / Other Services	\$23 Million	BS71000	1.78	\$40 Million
TOTAL	\$152 Million			\$264 Million

The total economic impact on B.C.'s economy of tourist spending in Osoyoos surpassed one-quarter billion dollars (\$264 Million) for calendar year 2020.

It should be noted that not all of this economic activity would remain within Osoyoos. The multipliers that were selected confine the induced and indirect economic impacts to within British Columbia (rather than Canada-wide or global impacts). By definition, 100% of the direct impacts (\$152 million) would accrue to Osoyoos as they were spent on consumer items sold in the community.

Indirect economic impacts (purchases of business inputs such as hotel furniture, restaurant food items, machinery, etc.) would have varying degrees of local accrual depending on the specific industry group of the expenditure and the commodity or service itself.

Induced economic impacts are primarily the recirculated incomes of tourism business owners and employees in the economy. Again, these will vary depending on the industry – local groceries, rent, transportation, and other local product/services would have economic value that accrues to Osoyoos, while other purchases such as vacations outside of Osoyoos, mortgage payments to a commercial lender outside the region, and others would not accrue to the Osoyoos economy.

2.10 Tax Revenues Attributable to Tourism

Tourist spending in Osoyoos generated an estimated \$41 Million to three levels of government in 2020, with the provincial government receiving nearly half (49%) of the taxes generated. Most of the provincial taxes are from sales of accommodations, which have the highest revenues of all expenditure categories (\$76 million) and the highest combined tax rate (16%). See Table 4, below.

Table 4: Tax Revenues (Federal, Provincial, Local)

INDUSTRY GROUP	Taxes Generated	% of Total Taxes
Federal Tax Revenues	\$19 Million	45%
Provincial Tax Revenues	\$20 Million	49%
Local Government Tax Revenues	\$2.5 Million	6%
TOTAL TAXES:	\$41 Million	100%

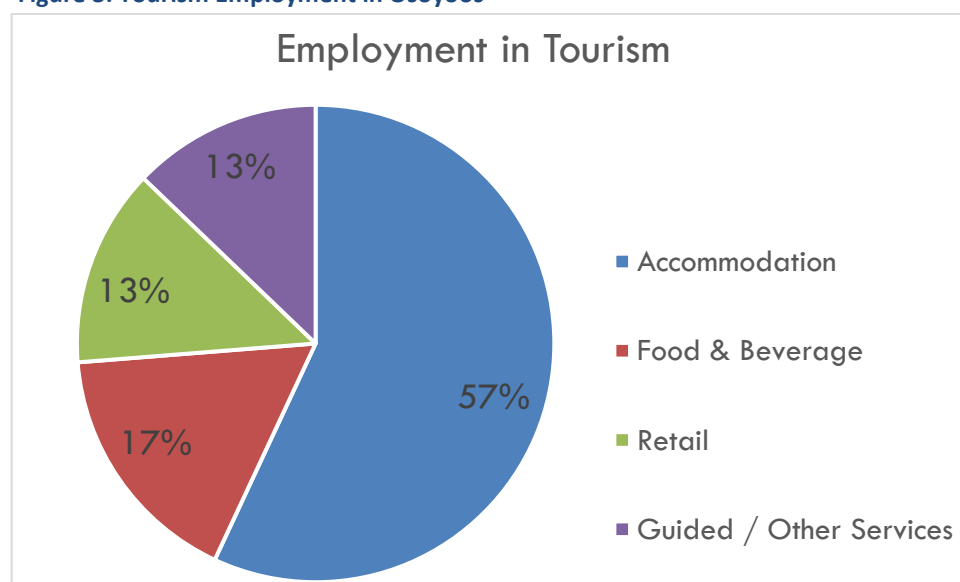
2.11 Tourism Employment⁷

Tourism is one of the major employers in Osoyoos, with an estimated 656 people directly employed in the sector in 2020. The region's accommodation sector was the largest employer, with 57% of the direct employment. See Table 5 and Figure 3, below.

Table 5: Direct Tourism Employment in Osoyoos

INDUSTRY GROUP	Direct Output	Employment Multiplier ⁸	Total Direct Employment
Accommodation	\$76 Million	4.9	373
Food & Beverage	\$29 Million	3.8	110
Retail	\$25 Million	3.6	88
Guided / Other Services	\$23 Million	3.7	84
TOTAL	\$152 Million		656

Figure 3: Tourism Employment in Osoyoos



Due to the challenges of estimating employment based on tourism revenues, these figures were cross-referenced with self-disclosed employment information in the Resident Survey conducted as part of this study. In the resident survey, 18.8% of the 844 respondents indicated that they worked directly or indirectly in tourism, with an additional 10% of respondents who responded "Other" indicating direct or indirect tourism employment (e.g. multiple responses for "winery" were included

⁷ Employment refers to an individual working in a specific job. In some circumstances, one person may have "employment" in more than one job (e.g. working two part-time jobs).

⁸ Employment multiplier ratios were derived from the Statistics Canada 2015 Input/Output Model (op. cit.). These ratios were benchmarked to the employment volumes for accommodation in the 2016 Canada Census of Population, the only discrete tourism industry group with employment values measured. Information on Osoyoos Canada Census of Population (2016) data were derived from <https://townfolio.co/bc/osoyoos/labour-force> (accessed April 8, 2022).

in the “Other” category.) From an employed labour force of 1,855 individuals in 2016, the 28.8% of residents employed in tourism represents an estimated 534 individuals when using this method. An additional 24.7% of respondents indicated that they worked in an “indirect” tourism industry such as retail or food & beverage. Comparing the two sets of results, this alternate method of estimating tourism employment therefore verifies the employment estimates above, or suggests that they may be somewhat conservative.

Approximately 30% of the Osoyoos labour force is directly employed in tourism, equating to 656 people in 2020.

3. OSOYOOS VISITOR ANALYSIS

In Summer 2021 Destination Osoyoos staff conducted visitor intercepts at strategic locations throughout the city, beginning in July. Unfortunately, the visitor survey was hampered by the Nk'Mip Creek Wildfire that was classified as “out of control” soon after its discovery on July 19 and lasting until the first week of September. Parts of the community were evacuated, and visitors were encouraged to either cancel or postpone their visits, making the intercept survey difficult to conduct.

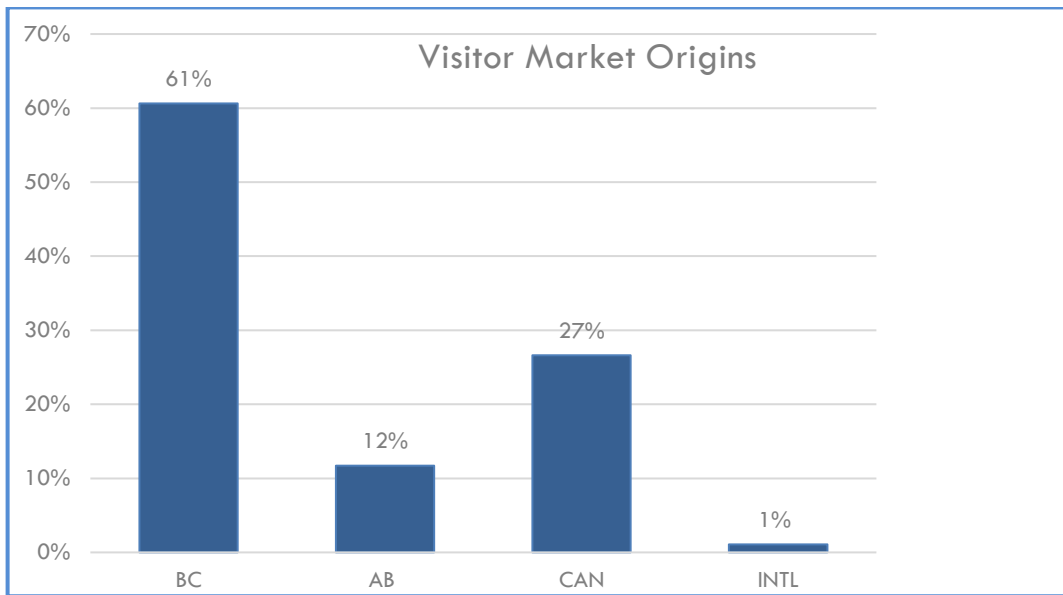
After the wildfire warnings subsided in September, Destination Osoyoos staff were able to conduct 94 interviews with visitors. While this does not result in strong statistical confidence, it nonetheless provides directional reliability for the main trends, at the level of the entire sample (analysis of individual segments is not possible with this sample size).

3.1 Visitor Origins

Visitors were almost entirely from within Canada, as the survey was conducted when international leisure travel was restricted due to COVID-19.

Just over three-fifths of visitors (61%) were from within British Columbia while 12% were from Alberta. The remaining 27% were from other parts of Canada. This is a notable trend as the Alberta travel market is typically twice the size of all other parts of Canada combined in British Columbia, suggesting that Osoyoos is a recognized destination brand in more distant domestic markets. See Figure 4, below.

Figure 4: Visitor Origins to Osoyoos (Summer 2021)

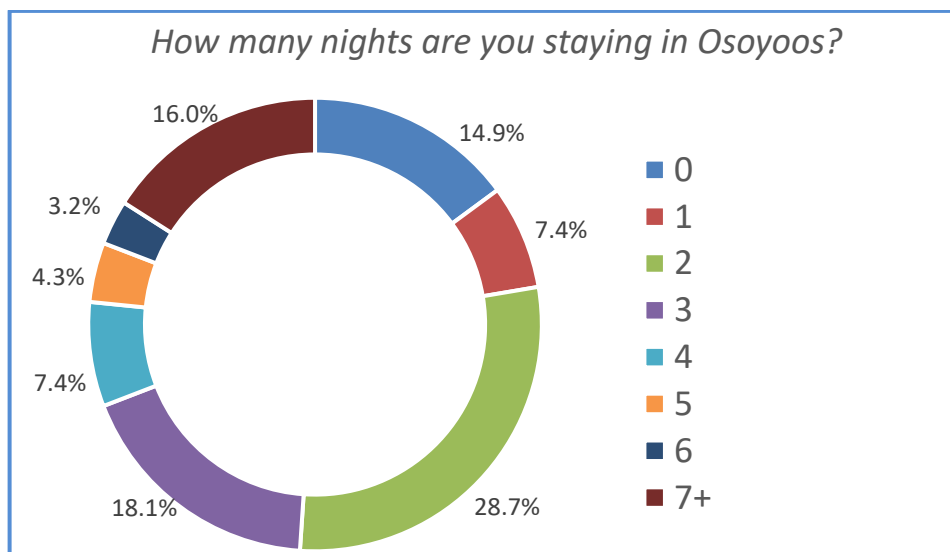


3.2 Length of Stay

The average length of stay was just over four (4) nights, which is longer than the length of stay for most communities in British Columbia (length of stay for individual communities is typically two (2) nights during summer and three (3) nights in Fall).

The most common duration (median) was two (2) nights, with 29% of visitors staying two nights. Only 7% of visitors stayed for just one night. A relatively high proportion of visitors are in the community for one week or more (16%), likely due to the high proportion of longer-stay vacation rentals in the area. See Figure 5, below.

Figure 5: Number of Nights in Osoyoos

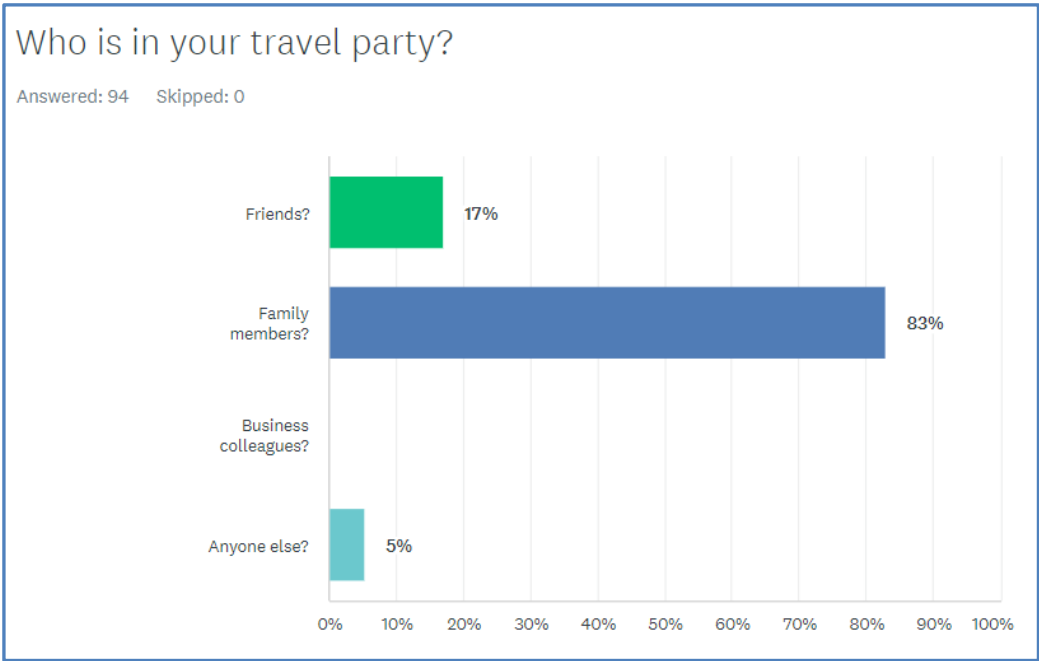


It should also be noted that Osoyoos has a very large seasonal resident population that display characteristics and expenditure patterns more similar to residents than tourists. These seasonal residents who stay in Osoyoos for typically 1-4 months are not included in these figures.

3.3 Travel Party Composition

Visitors to Osoyoos in summer 2021 were almost entirely travelling with family members (83%) or friends (17%). No respondents were travelling with business colleagues, however, this is possibly due to strict limitations at the time on meetings and events that would normally constitute the majority of business travel reasons. However, executive interviews suggest that even during non-COVID periods Osoyoos tends to have a small business travel market. See Figure 6, below.

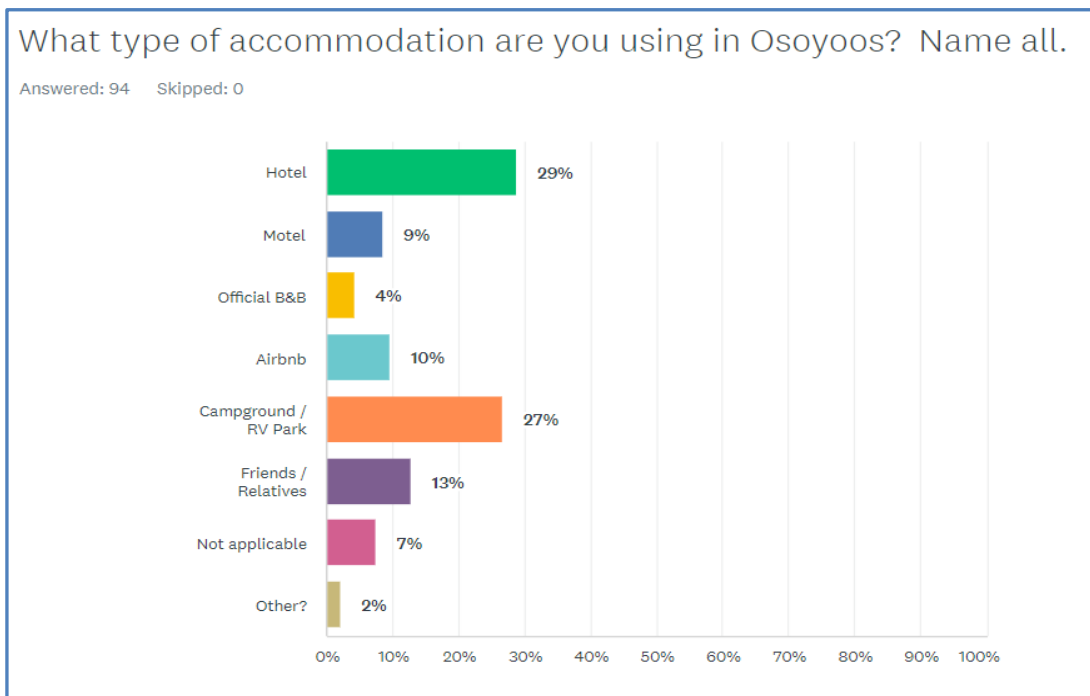
Figure 6: Travel Party Composition



3.4 Type of Accommodation Used

Visitors to Osoyoos use a diverse range of accommodation types compared with British Columbia overall. The proportion of Campground/RV Park travellers, for example, is nearly twice the provincial average. It is also expected that the many longer-term vacation rentals were within the “Airbnb” category as most of these accommodations are rented on that platform. See Figure 7, below.

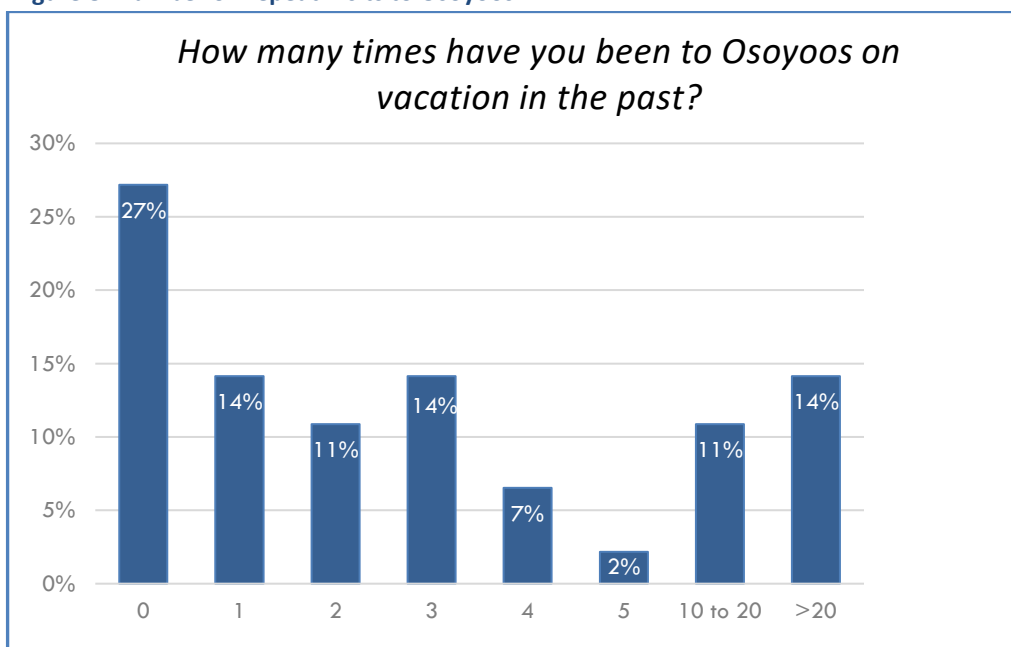
Figure 7: Type of Accommodation Used



3.5 Number of Repeat Visits

Osoyoos displays a highly unique trend in terms of repeat visitation, with approximately one-quarter (27%) of visitors having never visited the community previously, and another quarter of visitors (25%) having been to the community more than ten (10) times. Once again, the prevalence of longer-term vacation rentals in the community is likely the cause of this frequent repeat visitation with families primarily from B.C. and Alberta taking frequent extended vacations in the region. See Figure 8, below.

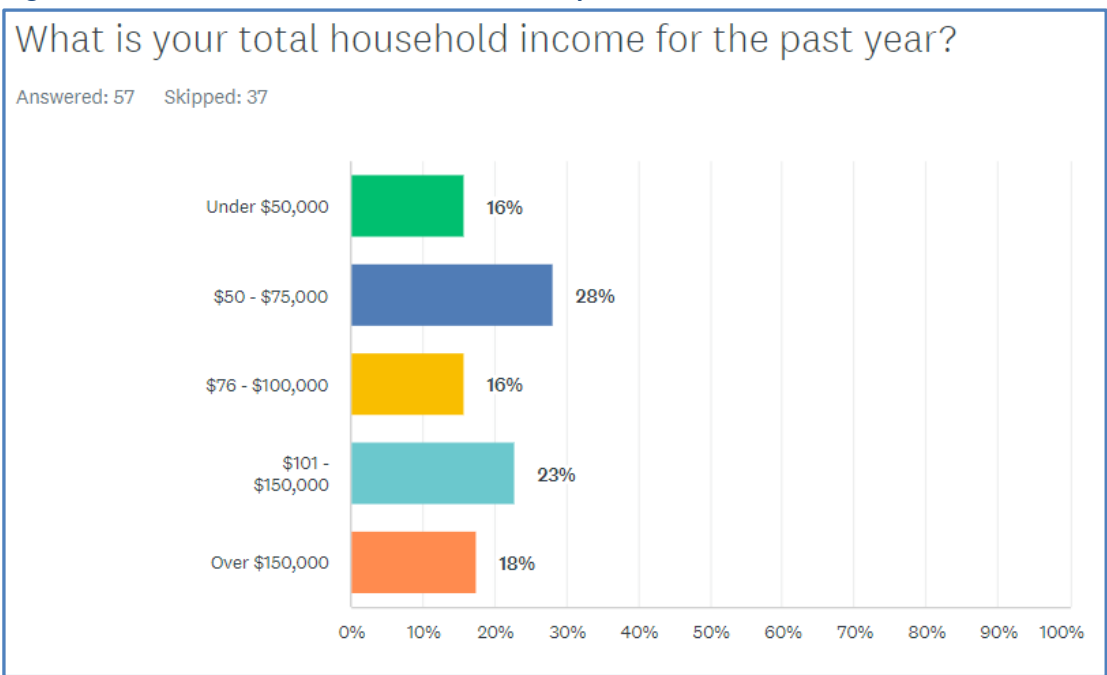
Figure 8: Number of Repeat Visits to Osoyoos



3.6 Household Income of Visitors

The total household income of visitors is similar to that of the general population of British Columbia, where the median household income is \$90,000 per year⁹. In interviews with tourism representatives as part of the executive panel evaluation, the panel identified a misperception of Osoyoos as a “playground for the rich” with attractions and pricing primarily focused on wealthy travellers. These initial data suggest that visitors to Osoyoos are generally representative of the broader population of B.C. and Canada. See Figure 9, below.

Figure 9: Total Household Income of Visitors to Osoyoos



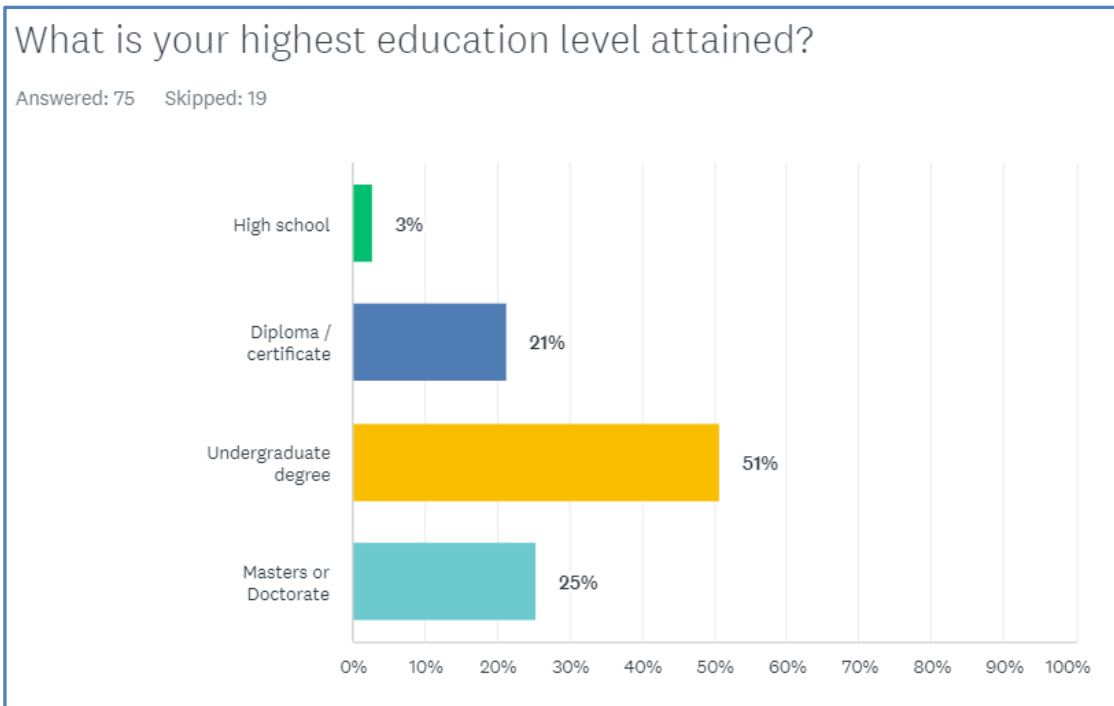
3.7 Education Levels of Visitors

While the income levels of visitors reflected the overall trends in B.C., the education levels of visitors to Osoyoos are considerably higher than the provincial average trends. More than half (51%) of visitors to Osoyoos have a Bachelor’s Degree, while the provincial average is 21%¹⁰. Additionally, while 9% of B.C. residents have a Master’s or Doctorate Degree, one-quarter (25%) of visitors to Osoyoos have a Master’s or Doctorate. See Figure 10, below.

⁹ Statistics Canada, CANSIM Data Table 11-10-0009, “Selected income characteristics of census families by family type,” release date July 15, 2021. Accessed April 8, 2022 at <https://www150.statcan.gc.ca/>.

¹⁰ Statista, “Population of British Columbia, Canada in 2021, by educational attainment,” accessed April 8, 2022. <https://www.statista.com/statistics/606839/population-of-british-columbia-by-educational-attainment/>

Figure 10: Education Levels of Visitors to Osoyoos



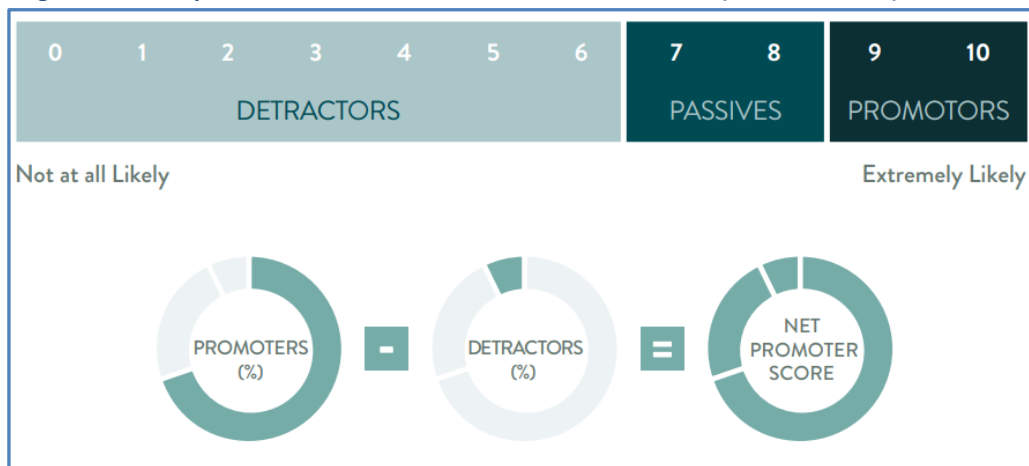
3.8 Visitor Satisfaction – the Net Promoter Score (NPS)

One of the most common ways to evaluate visitor satisfaction is with a Net Promoter Score (NPS). The NPS is the primary metric used by Destination BC, communities, and industry sectors across B.C. to determine the likelihood that a visitor will recommend a tourism destination to a friend or colleague.

The calculation of an NPS is relatively straight-forward. In a random, stratified sample (such as the Osoyoos Visitor Intercept Project), a sampler asks a respondent a simple question: “On a scale of 0-10, with 10 being the highest, how likely are you to recommend [Osoyoos] as a travel destination to a friend or colleague?” Individuals who respond with a 9 or 10 out of 10 are considered “promoters” while those who give a 7 or 8 out of 10 are “passives” and scores of 0-6 are considered “detractors.” The Net Promoter Score is calculated by subtracting the percentage of detractors from promoters.

An example of how to calculate a Net Promoter Score is shown in Figure 11, below.

Figure 11: Example of how to Measure the Net Promoter Score (Destination BC)¹¹

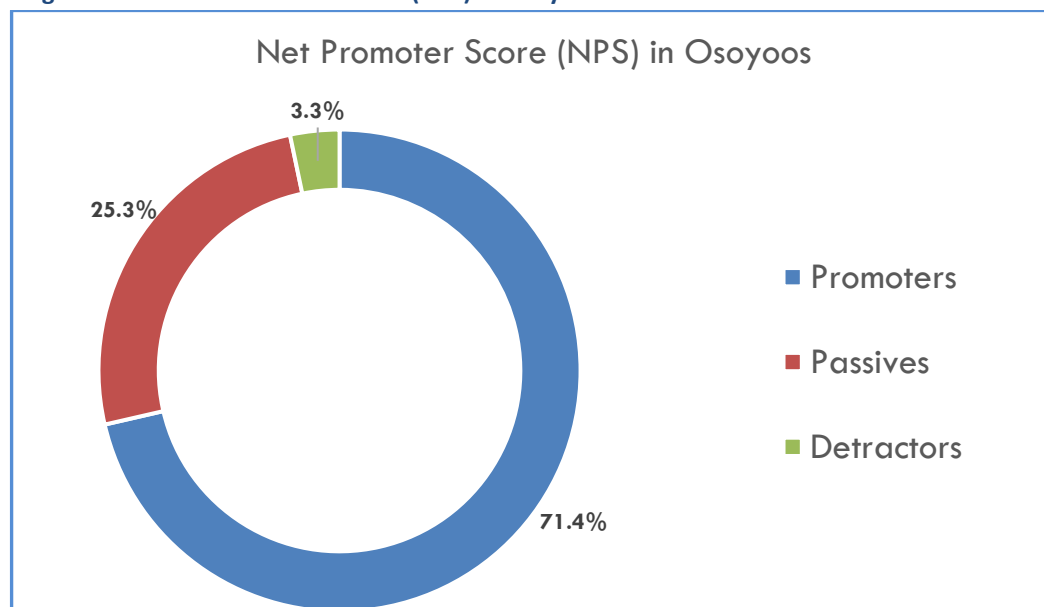


Using the formula in Figure 11 (above), the Net Promoter Score for Osoyoos is 68. The Osoyoos NPS was very high for a community in British Columbia, and is roughly equal to the overall NPS for British Columbia, at 68. Based on the visitor survey results, 71% of visitors are promoters, 25% are passives, and only 3% are detractors. See Figure X, below.

The Osoyoos Net Promoter Score is 68.

This is one of the highest NPS scores for any community in British Columbia

Figure 12: The Net Promoter Score (NPS) in Osoyoos



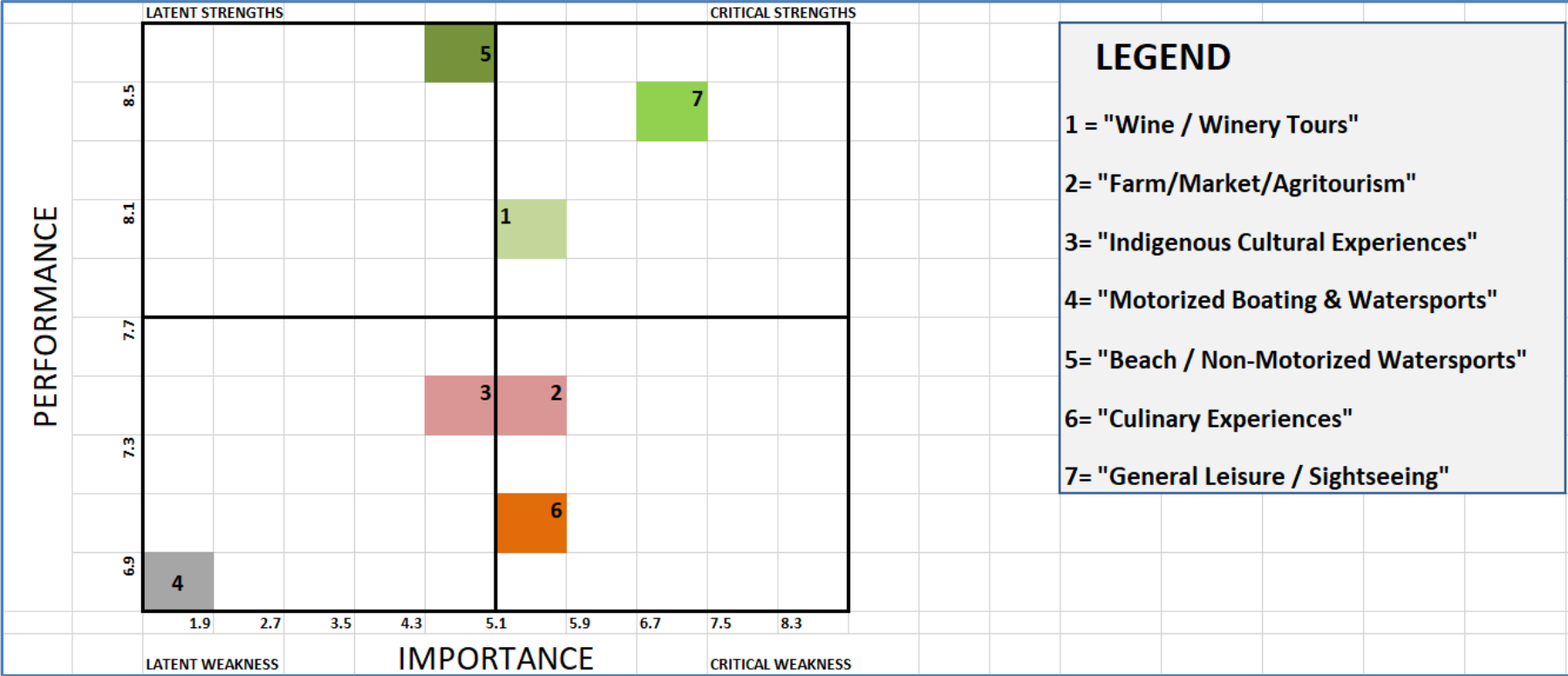
¹¹ Destination BC, "Introduction to the Net Promoter Score®," 2018. <https://www.destinationbc.ca/learning-centre/introduction-to-the-net-promoter-score/>. Accessed April 2, 2022.

3.9 Importance Performance Analysis (IPA)

Importance Performance Analysis (IPA) is an analytical method that provides powerful insights into the performance of products and services in the economy.

Conducting IPA is not overly complex: visitors are asked on a scale of 0-10 how “important” specific destination factors are in their decision to travel, such as winery tours, visiting the beach, etc. During or after travel, visitors are also asked how satisfied they are with these individual factors. The results produce a two-by-two matrix with Critical Strengths (top-right) where destinations excel in specific areas, and perhaps most importantly, “Critical Weaknesses” which are areas visitors deem to be important for their travel experience, but in which the destination has poorer performance relative to other factors. See Figure 13, below.

Figure 13: Importance Performance Analysis of Visitors to Osoyoos



3.10 IPA Evaluation

The IPA table reveals some clear and important considerations for Osoyoos as a travel destination.

The clearest “critical strength” is in the broad area of “general leisure / sightseeing” (#7 in table). This catch-all category suggests that the overall Osoyoos experience is greater than the sum of its parts. The combination of the overall destination attractiveness, activities, accessibility of attractions, and other general factors lead to an overall positive leisure experience for visitors.

The specific destination factor with the highest overall performance is related to #7, and this is “beach / non-motorized watersports” (#5 in IPA table). While visiting the beach was not, independently, as strong a motivating factor to travel as visiting wineries or engaging in Indigenous cultural experiences, it is regarded as the most satisfying factor by visitors. This “latent strength” means that it could be better leveraged and incorporated by the destination in management and marketing.

Visitors were similarly motivated in their interests in Indigenous cultural experiences (3), farm / market / agritourism experiences (#2), and wine / winery tours (#1). The broader region and Osoyoos specifically possess many world-renowned wineries and winery tours, and the performance scores were relatively strong (but below general sightseeing and the beach). However, the performance scores were notably lower than wine/winery tours for “Indigenous cultural experiences” and “farm/market/agritourism.” This is an important result when one considers the destination’s overall brand positioning, as Indigenous cultural tourism and small-scale agritourism / farmer’s markets help differentiate the region from nearby communities that are heavily focused on mass market wine tourism, golf, and lake activities.

Written comments also suggested that visitors were only moderately positive about their Indigenous tourism and local market/agritourism activities, this was due to two factors. The first was the quality of the experiences (lacking authenticity and experiential/emotional benefits), and the other is the insufficient availability of these activity areas – particularly agritourism / farm tours.

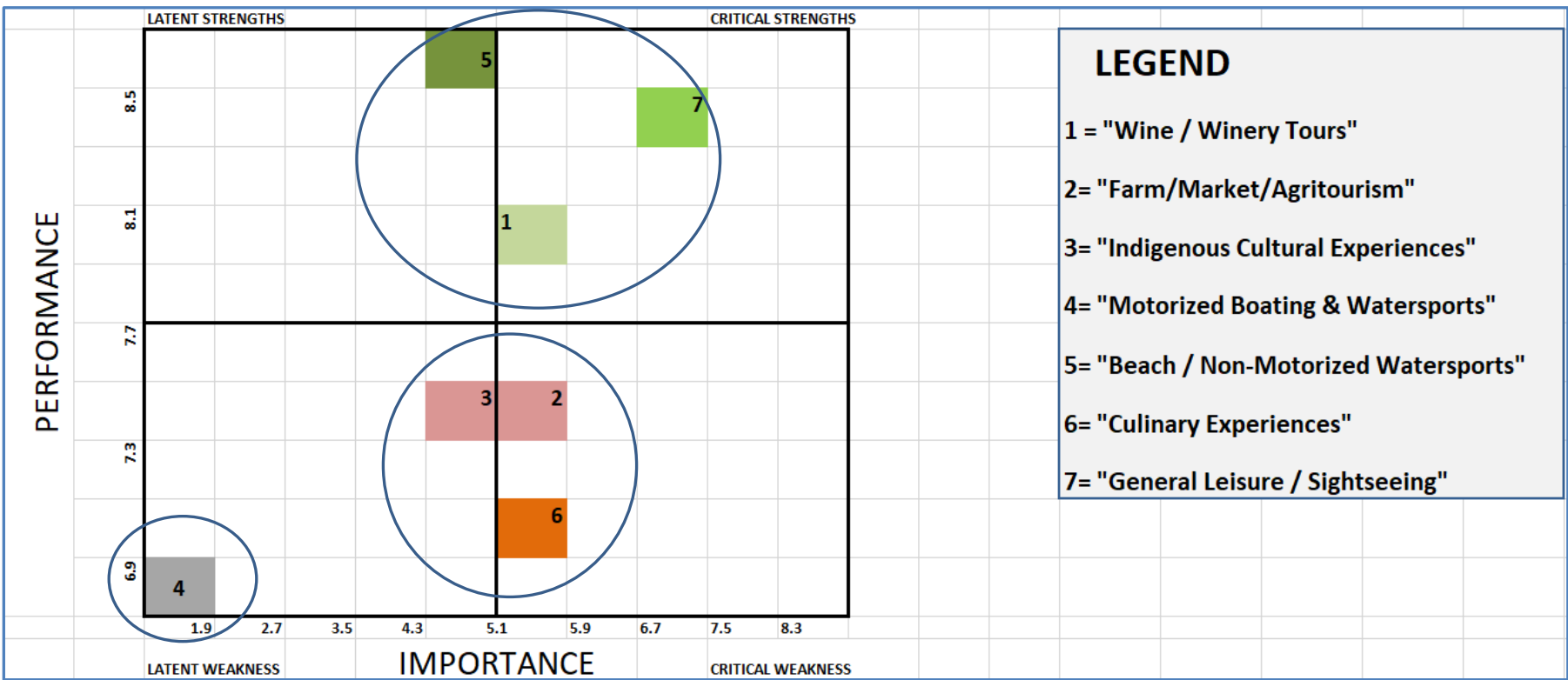
Motorized boating / watersports is not generally a tourist draw in terms of visitation to the community and attraction, and it performs lower on the spectrum than all other motivating aspects of travel in the region. Many visitors also provided comments that motorized boating was perceived as a nuisance to some visitors, due to noise, traffic congestion near the dock(s), and air pollution.

3.11 Activity Sector Trends in NPS

There are three distinct activity sector clusters associated with the NPS. The first is the “high performing” cluster, which includes relatively higher performing activities such as wine/winery tours, beach / non-motorized watersports, and general leisure. These are bread-and-butter activities for Osoyoos, and are key attributes of Destination Osoyoos marketing.

The second cluster is the relatively “lower-performing cluster” of activities that are quite important to visitors, but for which satisfaction lags below the average for all activities. These include farm/markets/agritourism, culinary experiences, and Indigenous cultural experiences. Motorized boating is in its own category due to its very low importance as a travel motivator and also its relative performance. See Figure 14, below.

Figure 14: Activity Clusters by NPS

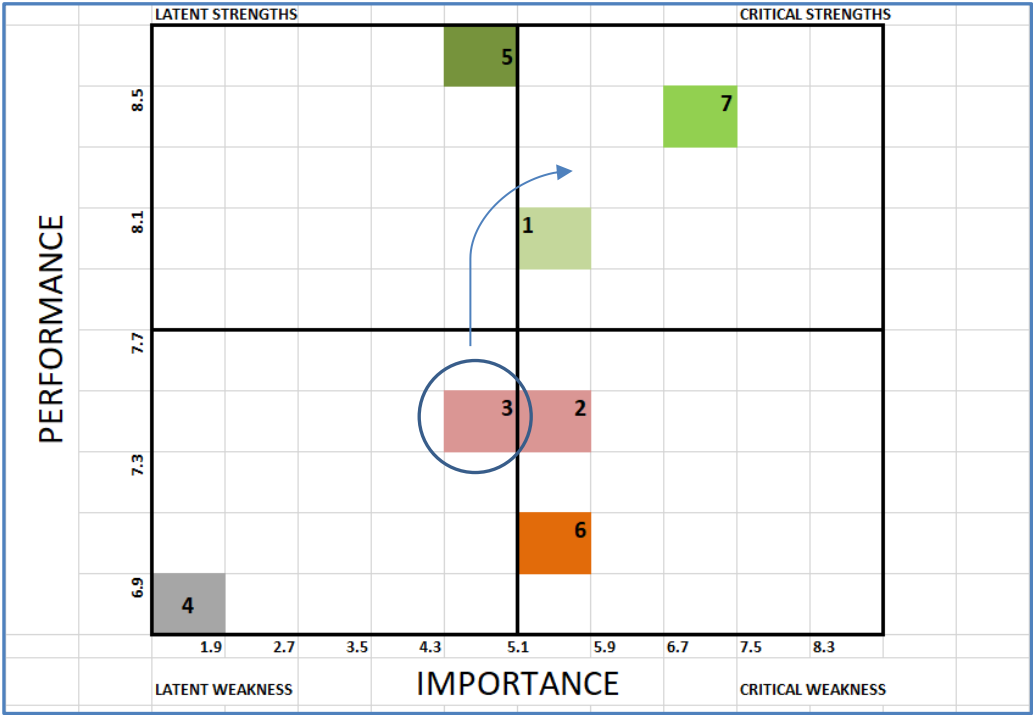


3.12 Indigenous Tourism Analysis

Indigenous tourism (#3, circled) is a moderately important factor in stimulating travel to Osoyoos, similar to visiting the beach (#5). However, unlike visiting the beach, Indigenous tourism experiences scored significantly lower on the performance rating, at 7.5 out of 10 (visiting the beach scored 8.8 / 10 for performance).

For scores in the bottom-left quadrant, the general recommended approach is to improve current performance (including quality, consistency, and availability), then increase the importance of this factor as a travel motivator. While these can be done concurrently, the emphasis should be on quality and availability of Indigenous experience design and development rather than promotions. In addition, increasing the relative importance of an activity is not undertaken by convincing current travellers of the activity’s importance, but rather, aligning marketing efforts with the interest levels of future market segments. See Figure 15, below.

Figure 15: Importance-Performance Analysis – Indigenous Cultural Experience Trajectory



Despite the “middling” overall performance of Indigenous experiences in the region, it should be noted that visitors who engaged in Indigenous experiences had a significantly higher Net Promoter Score (85) than those who did not (58).

NPS with Indigenous Experience: 85

NPS without Indigenous Experience: 58

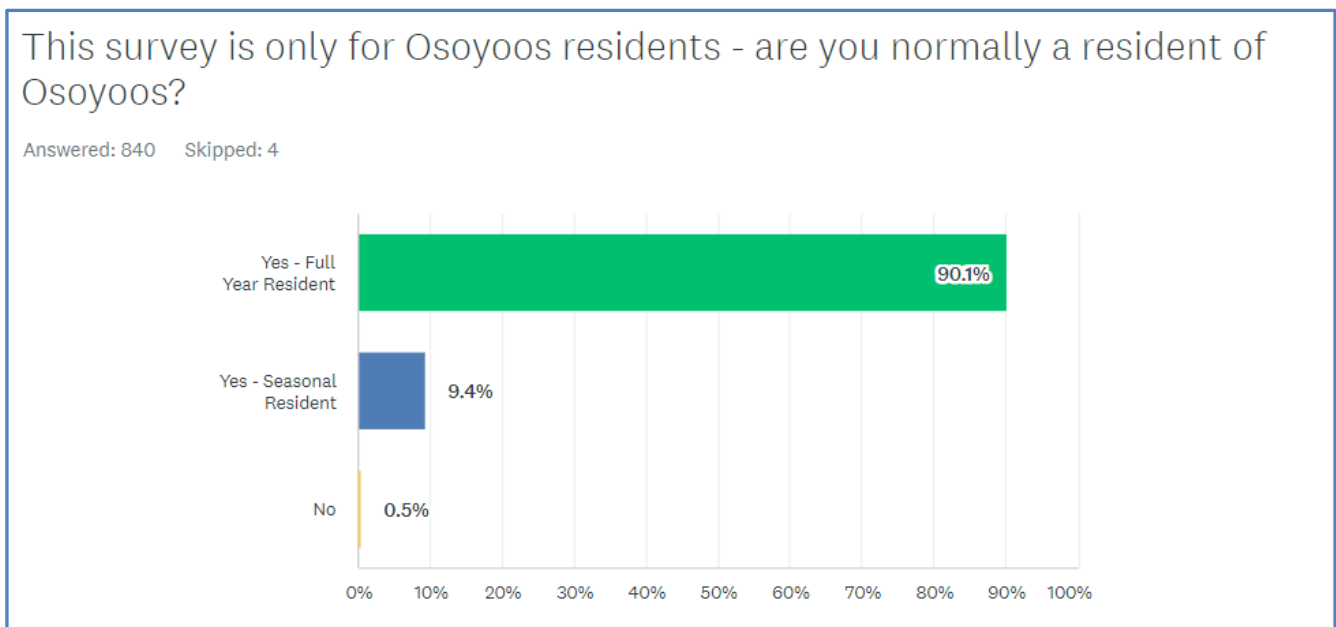
Evaluation of visitor characteristics and written comments did not provide additional insights into this result. Nonetheless there is a strong conclusion that visitors to Osoyoos are much more likely to recommend the destination if they engage in Indigenous cultural experiences.

4.0 OSOYOOS RESIDENT PERCEPTIONS of TOURISM

This study included the largest-ever survey and evaluation of Osoyoos resident perceptions of tourism. In fact, this is perhaps the largest-ever survey and evaluation of resident perceptions toward tourism ever conducted for a community in British Columbia. This reflects a significant interest in local residents to participate in discussions and planning related to tourism.

In total, there were 840 respondents to the survey, which was conducted as a combination of visitor intercepts, and promoted online through social media channels and conducted via Survey Monkey TM between November 14 and December 5, 2021. Of the respondents 90% were full-year residents and 9% were seasonal residents. See Figure 16, below.

Figure 16: Respondents to Resident Survey

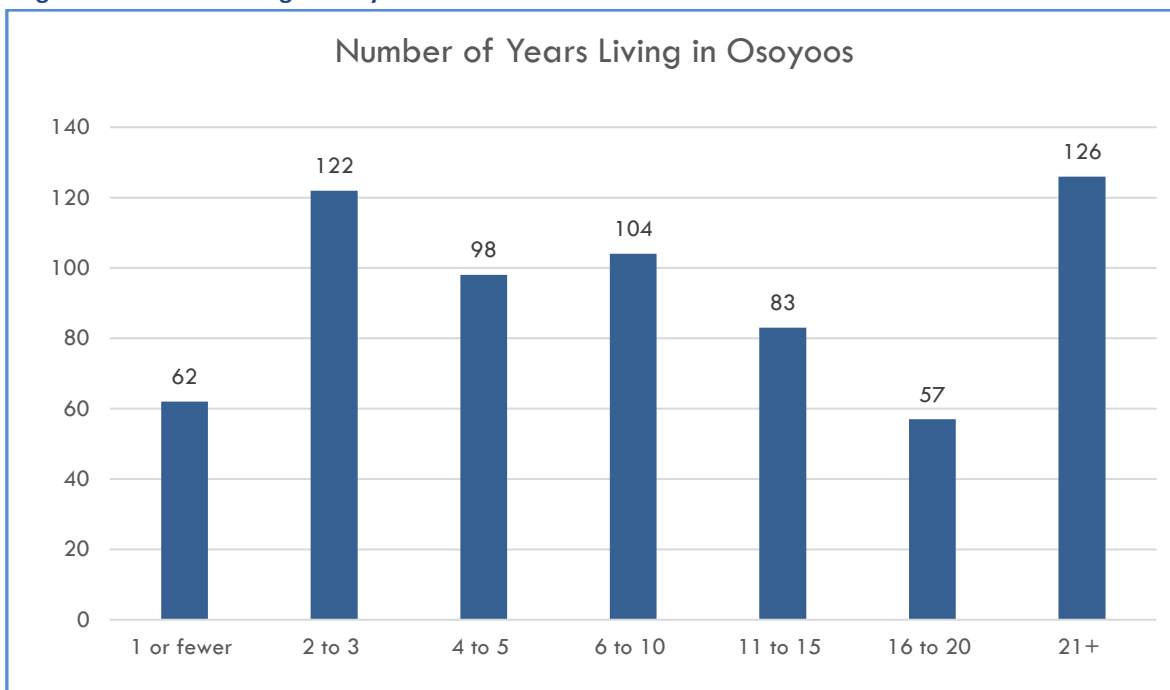


The survey had a relatively strong completion rate, with 79% of respondents responding to all survey questions. This is due in part to the low average response time to complete the survey, at just over four (4) minutes.

4.1 Years Living in Osoyoos

More than half the respondents have resided in Osoyoos for six years or greater, while just over one-quarter of respondents (28%) have resided in the community for three years or fewer. See Figure 17, below.

Figure 17: Years Residing in Osoyoos

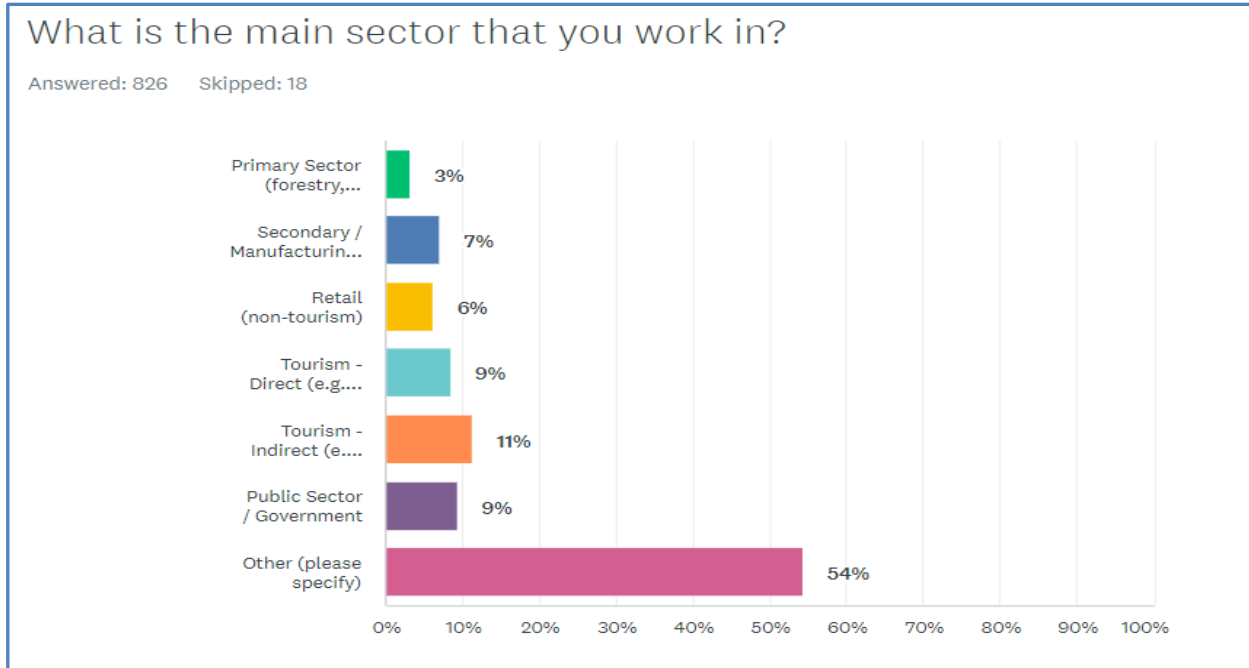


One of the more surprising elements of analysis was related to newer and longer-term residents of the town, and their perceptions of tourism issues. While newer residents (3 years or fewer) were slightly less concerned about environmental impacts of tourism, they were slightly more concerned about the (perceived) inability to be involved in, and influence tourism policies and planning in the community. However, neither of these differences were statistically significant.

4.2 Industry Sector of Respondents

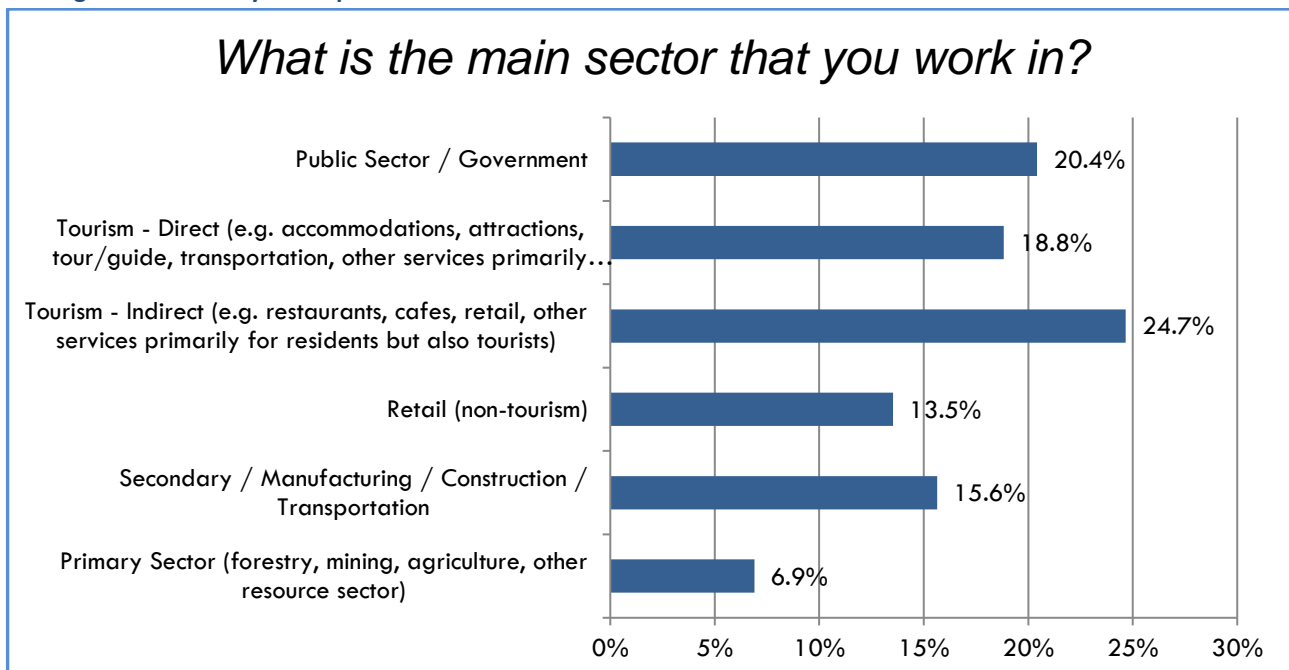
Approximately 20% of respondents were currently working in the tourism industry (9% direct; 11% indirect), while more than half (54%) indicated an “Other” industry sector. Approximately 80% of the “Other” respondents indicated that they were retired. See Figure 18, below.

Figure 18: Industry of Respondents



Removing the retirees from the question shows a clearer breakdown of the respondents currently in the labour force. Of currently-employed respondents, more than 40% indicated that they worked directly (18.8%) or indirectly (24.7%) in tourism. See Figure 19, below.

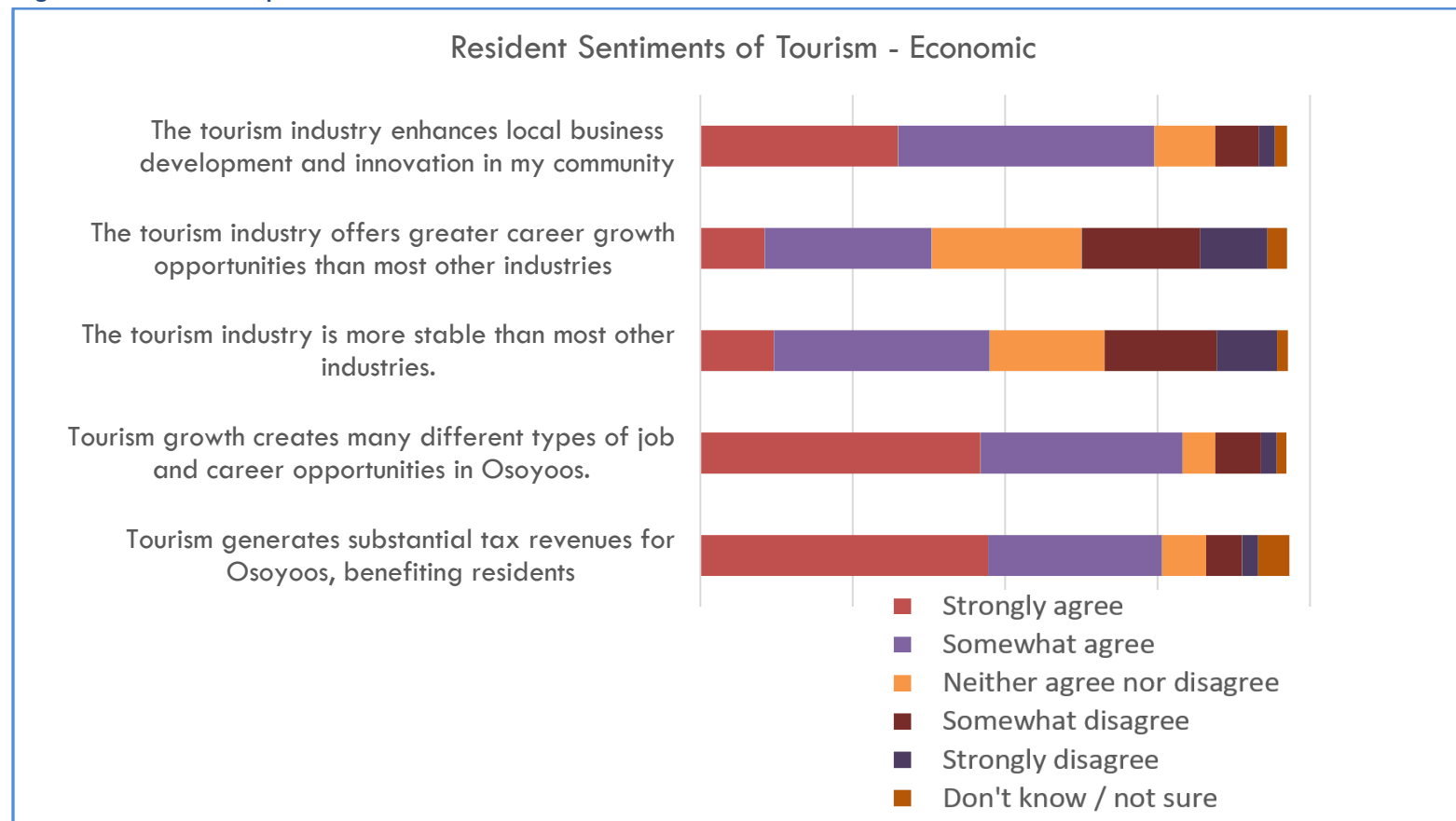
Figure 19: Industry of Respondents



4.3 General Perceptions of Tourism

Residents were asked a series of Likert-scale “agreement” questions to assess their perspectives on the relative benefits and concerns associated with tourism, from economic, social/cultural, and environmental perspectives. The first set of statements were related to general economic benefits of tourism (Figure 20, below). Residents generally perceive tourism to be a positive force for creating jobs, generating taxes, and enhancing local business development and innovation. The strongest levels of concerns were related to career growth opportunities in tourism, and the relative stability of the tourism sector compared with other industries. However, a greater proportion of residents agreed with these statements than disagreed. These are therefore generally positive responses, overall.

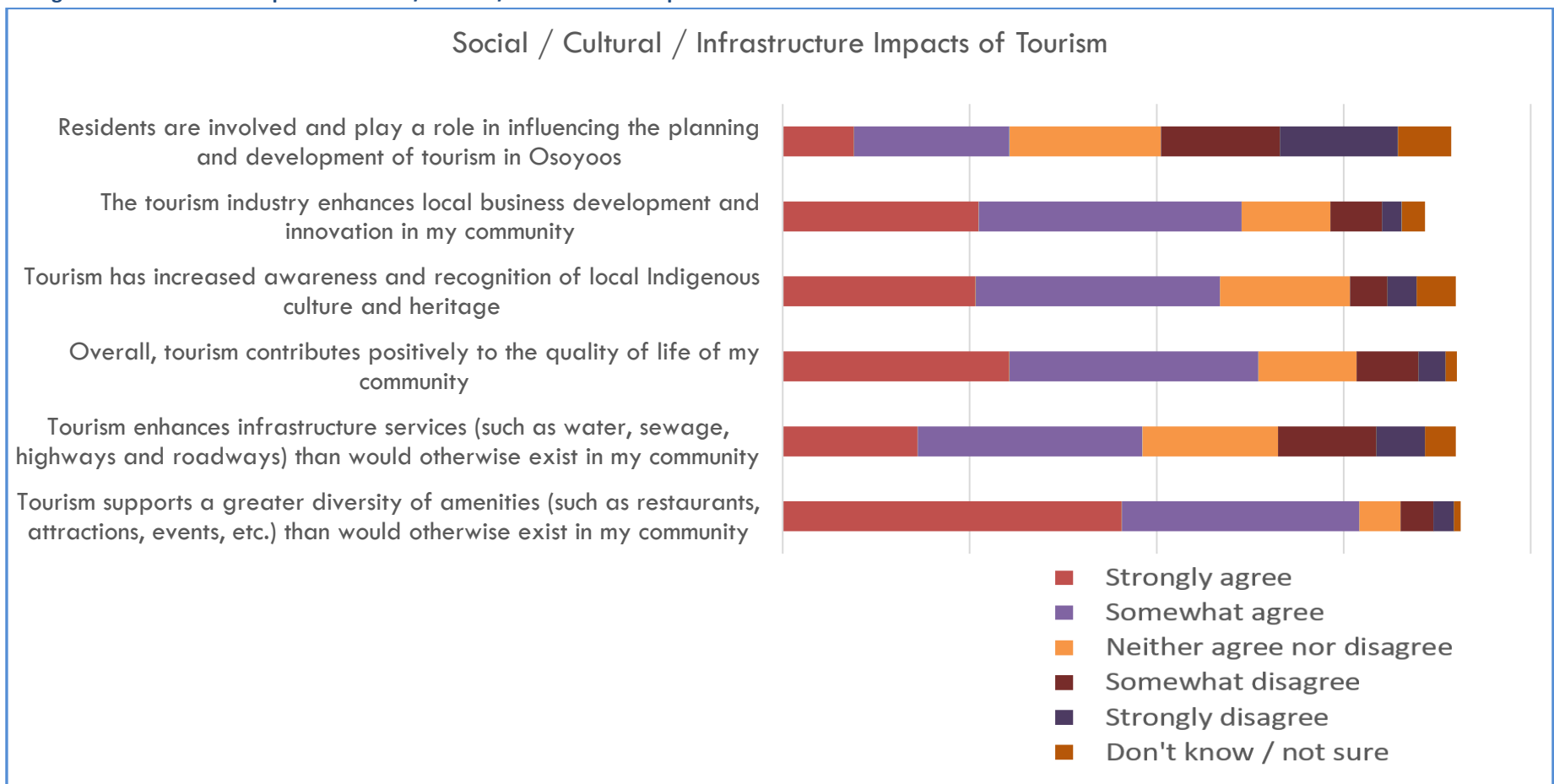
Figure 20: Resident Perspectives on Economic Benefits of Tourism



4.4 Social / Cultural Impacts of Tourism

Residents were even more positive about the social and cultural impacts of tourism, particularly related to tourism supporting amenities / attractions in the community, improving general quality of life, and increasing awareness and recognition of local Indigenous culture and heritage. The lowest level of agreement in this section was related to residents being involved in influencing planning and development of tourism. This was also a dominant theme in the written comments, with residents feeling disconnected from decisions that impact their daily lives. See Figure 21, below.

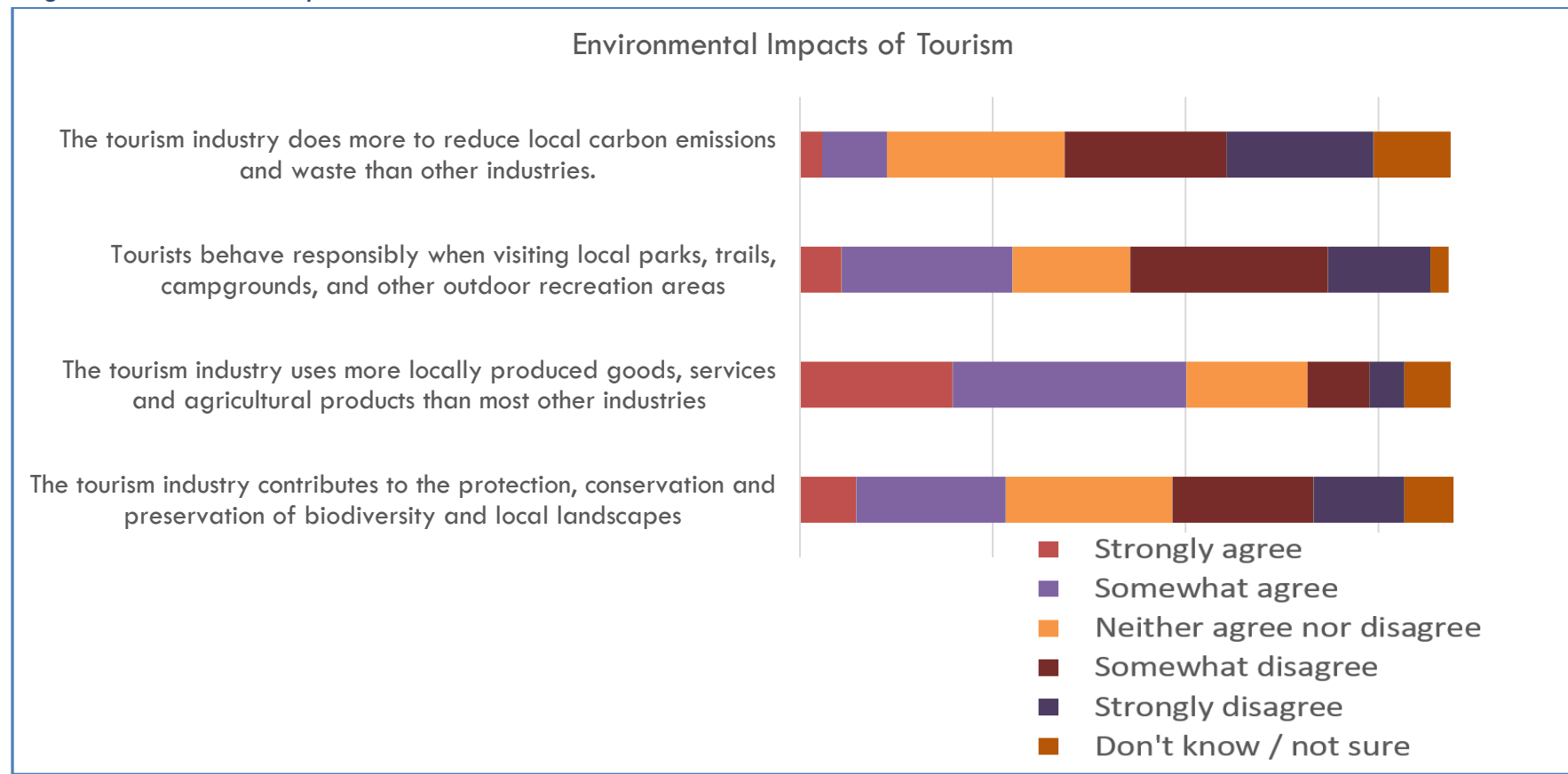
Figure 21: Resident Perceptions of Social/Cultural/Infrastructure Impacts



4.5 Environmental Impacts of Tourism

Residents of Osoyoos are more concerned with environmental impacts of tourism relative to the other impact categories. Residents had stronger levels of disagreement for all of the statements below compared to agreements, except for tourism using more locally produced goods, services, and agricultural products (nearly 60% of respondents strongly/somewhat agreed). Residents perceive that tourism lags significantly behind other industries in reducing carbon emissions, which merits further analysis as to whether this perception is valid. The most significant concerns expressed by residents are related to the behaviours of tourists in the community, and impacts on biodiversity and local landscapes. These are quite negative results and merit further evaluation and strategic response. See Figure 21, below.

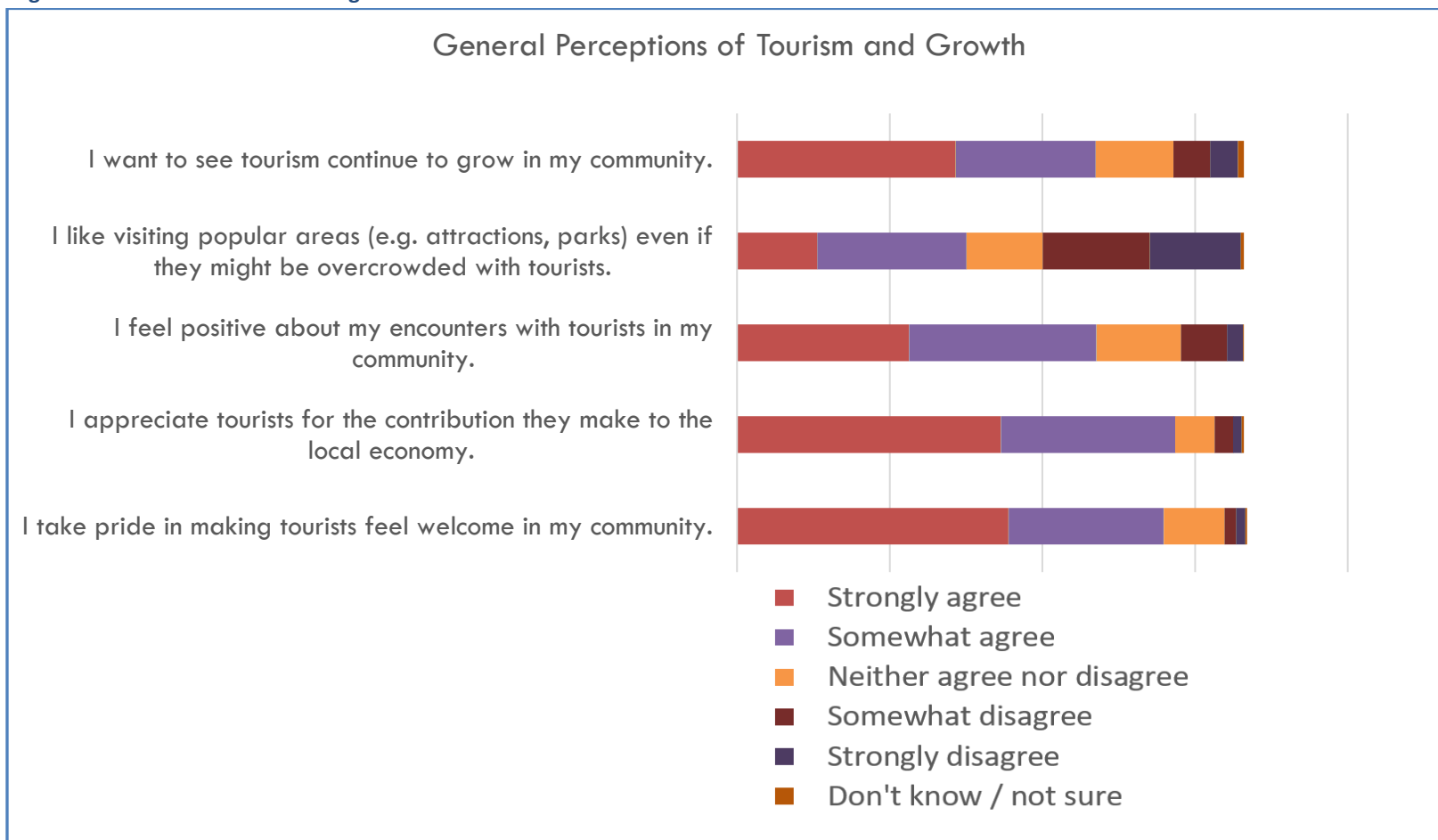
Figure 21: Environmental Impacts of Tourism



4.6 Tourism Growth and Impacts

Despite some concerns over feeling disconnected from tourism planning and some impacts on the environment, residents generally have positive sentiments regarding the overall role of tourism in the community, encounters with tourists, and the contribution of tourism to the community. Residents therefore strongly agreed that they wish to see tourism continue to grow in the community, with more than five-times (5X) as many residents agreeing they want to see tourism continue to grow than those who do not wish it to grow. See Figure 22, below.

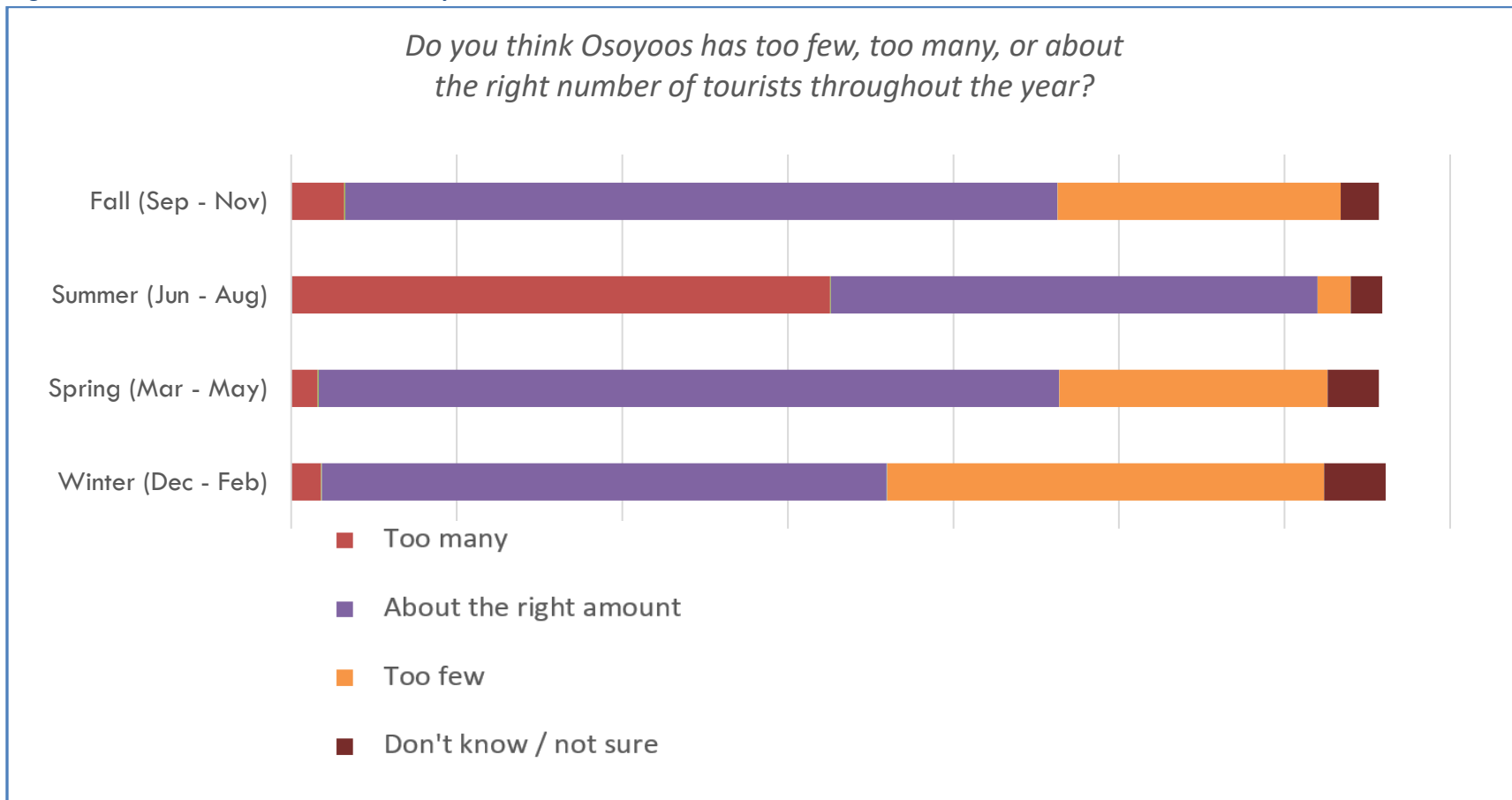
Figure 22: General Resident Feelings about Tourism



4.7 Support for Current Tourism Visitor Volumes - by Season

Residents generally believe that the community has about the right number of tourists, or too few, for all seasons of the year with the exception of summer. For the summer season, sentiments are almost equally split between residents who believe Osoyoos currently has the right number of tourists, and those who believe it has too many. Residents would be most interested in seeing additional tourists in the winter season. See Figure 23, below.

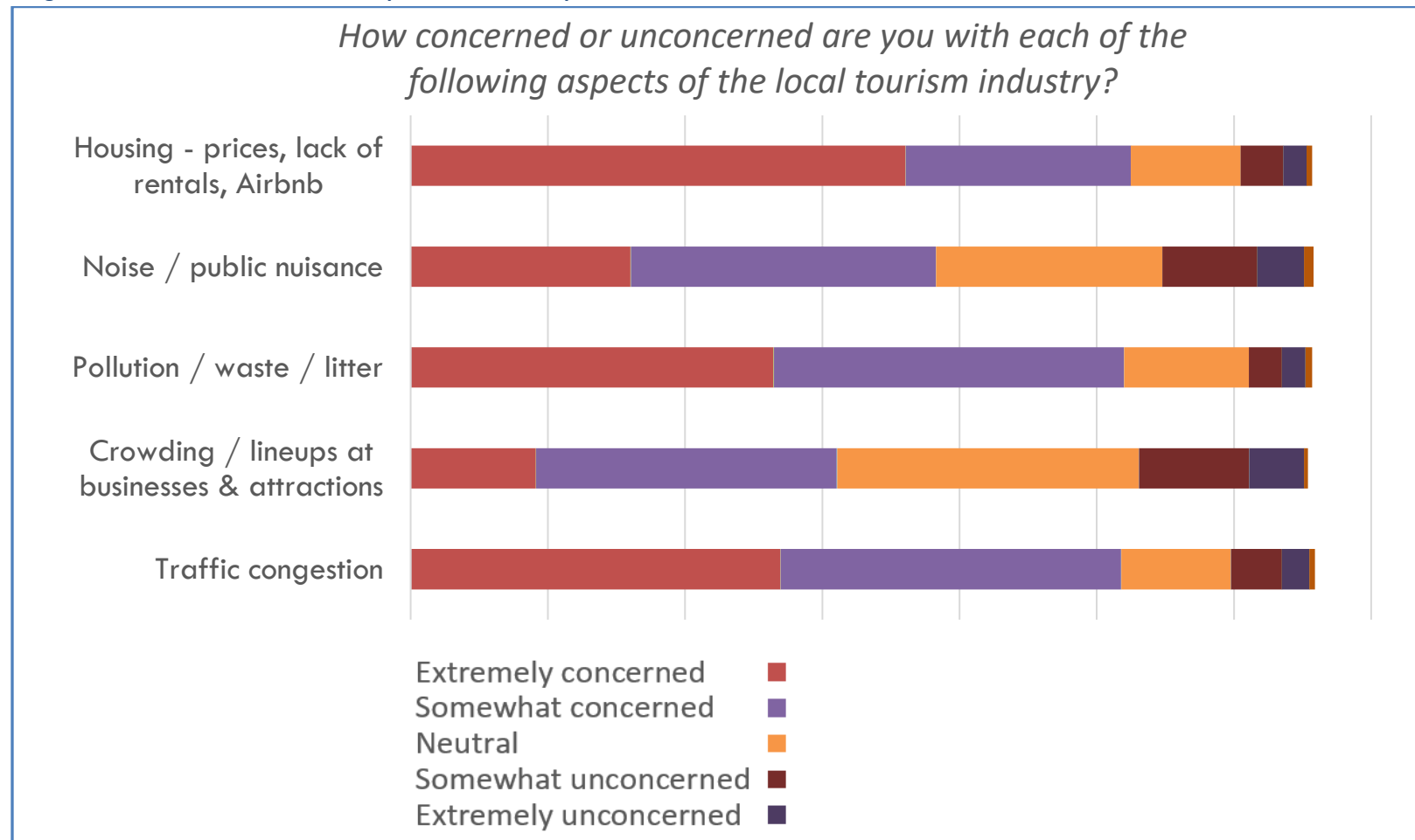
Figure 23: Desire for More/Fewer Tourists by Season



4.8 Concern about Specific Aspects of Tourism

There are three main areas where residents expressed the most concern regarding the local tourism industry: housing, pollution, and traffic congestion. For these issues, approximately 80% of residents were extremely or somewhat concerned, while only 7-8% of residents were extremely or somewhat unconcerned. The only category where fewer than 50% of residents expressed concern was for crowding and lineups. See Figure 24, below.

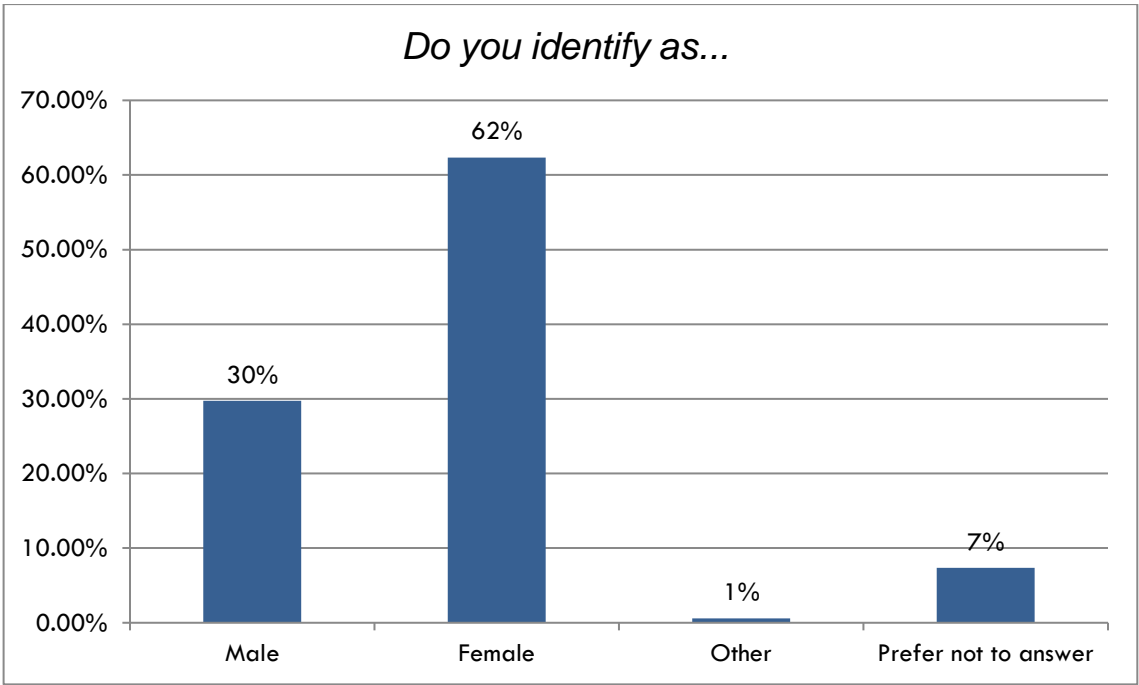
Figure 24: Resident Concerns about Specific Tourism Impacts



4.9 Respondent Gender

The majority of respondents were female (62%) while males constituted 30% of respondents. See Figure 25, below.

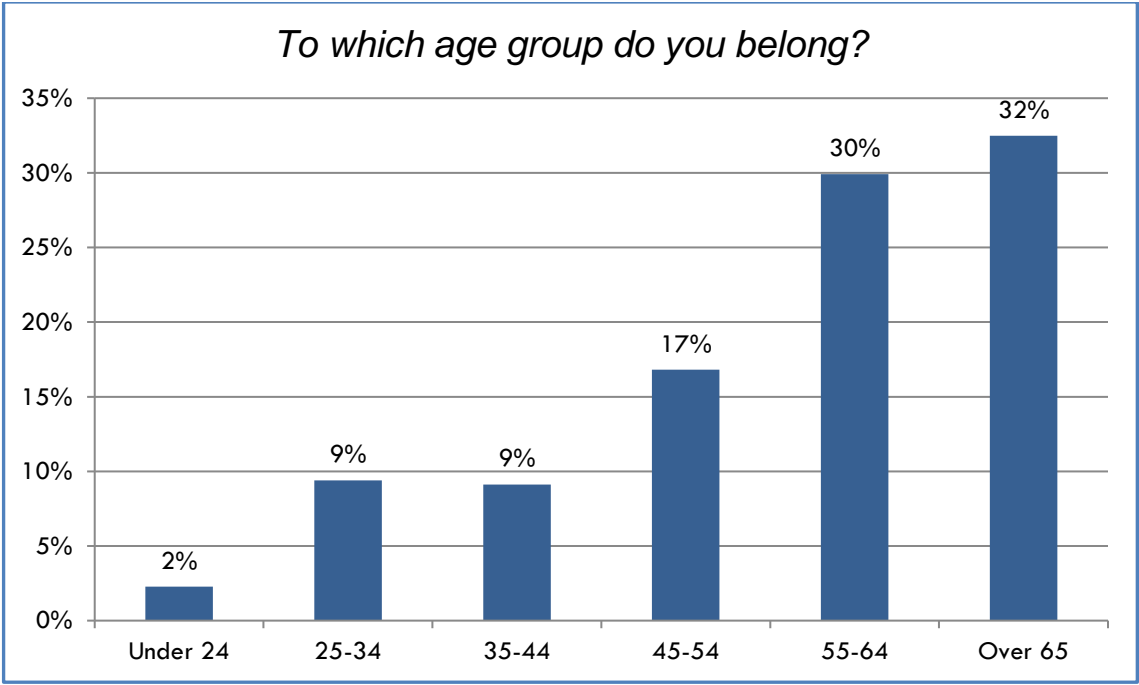
Figure 25: Respondent Gender



4.10 Respondent Age

More than half of the respondents were over the age of 55, while only 20% were under the age of 45. However, this generally reflects the age demographics of Osoyoos. See Figure 26, below.

Figure 26: Respondent Age



5. CONCLUSIONS

This comprehensive analysis of the Osoyoos tourism industry provides a wealth of information to guide the industry's sustainable development and management in the short-to-mid-term future.

A draft of this report was reviewed by an executive panel of local tourism experts to discuss the results and analysis. The report's key findings were strongly supported by the review, with no major concerns identified about the economic impact data, visitor survey results, or resident perceptions.

The most common takeaway, or key finding, from the executive panel is that despite some challenges facing Osoyoos that are unfortunately all-too-common for highly seasonal resort destination, residents are generally supportive of the industry, and visitor experiences are generally very positive. This is likely due to the very high economic impact of visitors in the region, due in part to their longer-stays and more immersion in the local community and culture.

Based on this executive review and facilitated discussion, a number of strategic themes and priorities were identified to enhance visitor experiences and limit negative externalities of tourism on residents in the future. These themes and priorities are initial evaluations to be used as a starting point for discussions about the long-term vitality and sustainability of the sector:

- ⊙ Increasing the number and quality of authentic Indigenous experiences in the destination
- ⊙ Improving the availability and quality of food and beverage services
- ⊙ Developing night-time activities for visitors / youth
- ⊙ Addressing challenges with limited parking downtown and congestion from the highway
- ⊙ Addressing negative aspects of motorized boating on beach-goers
- ⊙ Enhancing resident awareness of, and involvement in tourism-related planning discussions
- ⊙ Maintaining business availability in shoulder and low seasons (staying open past summer)

The executive panel also concluded that Destination Osoyoos should play a key role in continuing to engage residents, visitors, and the tourism sector, itself in better understanding the positive aspects of tourism while identifying possible solutions to address visitor and resident needs. Planning for tourism is a complex undertaking that requires governments at all levels, and particularly local governments, to be highly-attuned to the needs of visitors, tourism-related businesses, and residents.

Osoyoos is generally in a favourable position regarding opportunities to grow and diversify the tourism sector in the future. Despite some concerns from residents about specific aspects of tourism, residents remain generally supportive of the sector's ongoing growth and viability.

This report can be used as a catalyst to further enhance awareness of the tourism sector in Osoyoos among residents, and identify possible solutions to ensure that the sector maximizes benefits to visitors, tourism businesses, and residents, while improving local quality of life, respecting local culture and heritage, and preserving the region's unique and sensitive ecosystems.

APPENDIX A: SURVEY VERBATIMS (UNEDITED WRITTEN COMMENTS)

The final question asked residents of Osoyoos “Are there any specific actions Osoyoos could take to enhance benefits of tourism while minimizing negative impacts?” The following verbatims were provided (below).

The most common themes in the written comments are the following categories:

- ⊙ Housing / affordability
- ⊙ Traffic issues (parking, highway through town, congestion)
- ⊙ More activities needed for youth / teenagers / visitors, especially in evenings
- ⊙ Better law enforcement for tourists in peak season
- ⊙ Maintaining business operations during shoulder and low seasons (not shutting down after summer)

Verbatims:

- 2-3 more boat ramps! large day marina! trailer parking! [Don't eliminate] angle parking
- 4 lane bridge/main street. Reopen the street by the post office/bmo
- Absolutely! We need more police presence in the summer I feel there is to many minors walking around with alcohol then of age people. We would have less accidents if people would just obey the laws
- Add winter/fall tourism
- Address sidewalks and the use of them, need to be wider and restricted to foot traffic only
- Address staff shortage in some way!
- Advertising in Canada
- Affordable housing
- Affordable housing for full time residents.
- Affordable housing for full-time residents
- Aquatic centre to provide influx of people from other places for swim meets, more amenities for snow birds and year round for residents
- As a permanent resident and tax payer we would appreciate being recognized and not pushed aside for tourist season. We are businesses bread and butter in the off season.
- As a tourist community and relying greatly in tourism dollars there should be housing for staff provided my employer and town!
- Better bylaw and police presence.
- better music in the park, Fridays and Saturdays, also paint the bandshell, neutral colours. More food trucks.
- Better roads in town to get to places
- Better water access activities.

- Bike stands, benches, more food trucks in food court
- Bringing in a well known artist in July every yr would be great for the music in the park
- Build a casino.
- Build more rentals. Build more medical facilities. Entice young people to work in the summer, businesses aren't short staffed.
- Build real sidewalks, reduce congestion, get rid of these ugly motels, ugly billboards, invest in the main street,
- Businesses in town tend to shut down too early. Need more things to do in the evenings. Nelson has the right idea.
- Bylaw enforcement
- Bylaw enforcement easily available 7 days a week... longer hours
- Could be a benefits card offering locals discounts. Prices seem inflated here. Speed bumps at cross walks would also be good.
- Create affordable housing options
- Create an alternative traffic route through town so that locals can get to and from work, get their groceries and live normally while sharing their town with tourists. And fix the left turn problem by installing lights or stop signs in appropriate areas, or roundabouts. The road system needs LOTS of work.
- Create more things in the Fall
- Create more year-round tourist attractions to enable local residents to have full time jobs throughout the year. Winter markets, lights, festivals, parades, halloween attractions, indoor attractions - anything that keeps tourists here longer will help the economy and not force closures or business slow downs during non-summer months.
- Create safer traffic areas, more crosswalks/lights
- Curbing the blatant public drinking and getting high in public places would be nice, locals want to enjoy the space too
- Develop infrastructure & keep full time property tax paying residents informed of the positive benefits of tourism to non-business operating residents, if any.
- Discourage tourists from coming
- Don't allow grocery stores to raise prices in the summer ...
- Either enforce the short term by-laws or legalize airbnbs
- Encourage downtown to keep businesses open in evening. I often see people looking in windows after a day at the beach but businesses are closed.
- Encourage transportation options other than cars. How about not just focusing on tourism and be open and supportive of other established and new industries to the town.
- Encourage year round business
- Encourage/promote more responsible travel. I would be curious to know the carrying capacity of some of our outdoor destinations because I imagine we are quickly approaching it or exceeding and with climate change that could become detrimental for everyone that loves Osoyoos.

- Enforce the existing by-law of not allowing Airbnb. Make long-term housing rentals available, most people cannot afford to buy a home. That is a luxury. Essentially, tourism cannot and will not be sustained or improved if there are workers here to support the industry. We need to lower the age demographic or eventually we will turn into something like Oroville.
- Ensure that tourism operators provide housing for their staff. Ensure that local infrastructure can accommodate the influx of tourists. Mandate that operators contribute and invest in the health of the community overall, not just for the tourism season. Encourage tourism operators fund transportation networks between Oliver, Osoyoos, the Similkameen valley and Penticton that runs more than once per day.
- Ensure there is more “attractions” for tourists to use rather than wineries and the pub
- Fireworks
- Forcing city hall to clean up downtown and making sure bylaws are followed, i.e. no short term rentals with Airbnb etc
- Get more affordable housing for people in the hospitality industry.
- Give more consideration to the locals and grocery prices
- Grow other industries, occupations rather than just tourism.
- Have a public boat dock.
- Have more cabs or even better allow Uber in the summer months. Cut down on D&Driving
- Hiking and biking trails, indoor swimming pool
- Housing
- Housing and accommodations designated for those working in or residents of Osoyoos. Limiting housing that can be bought by out of town owners. The town also needs to encourage other industries that do not rely on tourism to maintain a growing, diversified, strong population of all ages.
- housing for staff so local businesses can accommodate the tourist business
- Housing for tourism workers is needed. DO is great at getting tourists to our doorstep but then amenities, events, etc are lacking. Need to move away from the heavy reliance on volunteers to run events. Need paid staff with volunteers in support roles.
- Housing for workers (seasonal or otherwise)
- How about coupon books for local restaurants, attractions etc. This might promote local businesses.
- hwy not going thru town for sure
- I feel the town does an awesome job already. I’m new here, and moving from AB for that reason. We also discovered Osoyoos; because of the pandemic. Also from Central Alberta; we once owned a condo in Palm Springs. After selling it; we started coming here. Love it so much; we are slowly becoming residents! Renting in Osoyoos, but building in Oliver. Couldn’t be happier. Love the small town, and tremendous sense of community. 😊😊
- I think law enforcement should be increased during peak season

- I think more businesses on Main Street and more sitting areas along Main Street with shade. More murals that beautify and educate tourists about the area. Discounts to full time residents.
- I think our town is doing a good job of tourism 🙌
- I think the town needs to grow , and what I mean is that it needs to give up the “Town” status and increase the limits. I think that the town needs to start understanding that people want to live here full time. And put more focus and growth of the town than tourists. Tourists come with a sense of ownership and entitlement to cater to them but they don’t give anything back. Think locals and do things for locals
- I would like to see more public lake access on the south US side of the lake.
- I would like to see the Destination Tax paid by tourists to go towards something to benefit the residents like a pool. Then the residents might be happier about the tourists.
- Improve infrastructure to handle the increased population in summer months and pave the highest grossing tax areas that aren't seeing any improvement even though the taxes are extremely high. No benefit for my lakefront taxes. Harbour key drive. Original pavement from the 1970s and no storm drains or sidewalks. Very poor rainwater management and neglect of regular maintenance. Floods road in several place every time it rains.
- Increase the hours that stores are open
- Indoor pool
- Indoor swimming pool
- Inform visitors of the fragility of the local land and water ecosystems
- Install a traffic light at Lakeshore dr and hwy 3
- It would be nice to have an incentive for locals during tourist season
- It’s a real problem for locals when businesses shut down for the winter. That’s when we like to go out and enjoy many of these tourist attractions, but find them closed. The same goes for many restaurants and other attractions that we would like to visit when there are fewer people.
- It’s the mentality of the tourists themselves who need to respect!
- Its time to diversify our economy. Its time to start making Osoyoos a town that young family's can grow here. This way we can attract young professionals such as doctors and other skilled professions.
- just keep improving
- Keep angle parking!!!! Build docks on the lake so people don’t have to moor in swimming areas. It’s a no brainer that Osoyoos ignores.
- keep main st. the same as is
- Larger police presence, holding tourists , transient workers responsible for their footprint.
- Leave the angle parking alone on Main Street or parking will be a nightmare. Allow many more food trucks in the area. Encourage the development of businesses and

industry so that there will be more opportunities for families to live in Osoyoos and work in our restaurants and tourism industry. Increase low income housing in Osoyoos to house our young families and those working in the tourism industry. Encourage the development of a local pool to keep young families in town instead of fostering a town where people want more for their families and live elsewhere. It is essential to have a walk in clinic or primary health clinic in our town. This should be a priority for our residents, snow birds and tourists. This is a huge inequity in our town that needs to be rectified.

- Legalize Air BnB and collect missing tax dollars in right areas. Expansion on native land should be controlled for services that are paid for by local residents.
- Less summer events, more off season events. Why have an event when the town is full. November through March need attention not summer. Ever hear of Christmas in November at Fairmont Jasper Park Lodge. Completely sells out every year.
- License AirBnB & VRBO
- Lighted cross walks along Main Street / Highway 3 marked bike lanes
- Limit the lake to electric motors, kayaks, paddle boards, canoes etc. Ban the jet boats
- Listen to your local people not just the people that call themselves locals because they moved here from bigger locations and don't understand the agriculture, remember why you moved here and in order to keep our young families here we must create jobs and housing for us all that are affordable not starting 300,000 and up and considering that affordable to buy and rentals also lowered. This is a farming community not a city. It should have local people that grew up in the area in the counsel not people that are not open to change and change in a positive way, why wife's side walks and take away parking when we are already struggling with all of that as it is, put the money into housing and possibly fruit trees on the streets and along the beaches to represent our community of farmers not just wine.
- Main Street is way too busy. Road bypass so big trucks can't go down main street. Very noisy!
- Make Air BnB legal and collect taxes or shut them down. More winter/fall/spring activities for young locals
- Make Osoyoos's roads (and highways) more bike-friendly.
- Make those people who come and make a mess and who leave their trash all over the place pay in some way. The town should make it that no transit camping areas allowed.
- Many of the businesses are located on the provincial highways and the town keeps implementing things to slow traffic on the highways instead of encouraging development on other streets and encouraging the smooth efficient flow of traffic on the highways. In an emergency, this will cause havoc and seriously impede evacuations. The stunning lack of foresight will cause significant harm when people are trying to evacuate especially when it involves tourists who know no other routes in and out of town.

- Mark our crosswalks very clearly with flashing lights
- More activities in Gyro Park during July and August
- More activities or concerts during July and August
- More affordable housing, instead of dumb ass condo buildings apartments would be much better. All businesses here are short staffed and struggling, but all the available workers can't stay in Osoyoos because there is nowhere they can afford to live.
- More areas for children to play; clean up sand on beaches; more restaurants/stores on east side of town which would ease traffic jams getting over bridge to visit restaurants. Never understood why the Town doesn't push for more on east side.
- More bike trails connecting the Okanagan Valley.
- More boat launching places and more places for people who live here to have places to keep their boats on the water for the summer.
- more BOAT RAMPS. boat marina, trailer parking, don't waste money on getting rid of angle parking!!!!!!
- More bylaw enforce
- More bylaw enforcement at parks, more bike lanes especially connecting off highway from town to road 22
- More bylaw officers
- More bylaw officers. In summer Keep dogs off Cottonwood beach and people from sleeping in the park
- More campsites - not RV parks
- More festivals or attractions year round comparable to cherry fiesta.
- More housing for long term residents and a better infrastructure to accommodate tourists, ie transportation and accommodation
- More knowledge of other beaches and not just the main one
- More off season events
- More outdoor/sidewalk space for small coffee shops/restaurants
- More parking
- More parking for locals to shop local.
- More recycling education and carbon foot print
- More recycling of packaged food, plastic floated left behind etc.
- More rentals for locals
- more rentals for workers at a lower rent price
- More restaurants
- More RV/Campsites
- More security
- More signage
- More to do on winter.
- More trees for shade! And for birds
- more TV publicity especially on the coast
- More winter activity for young locals and better transportation options

- More workers affordable housing
- Motor boat restrictions
- Need more housing for all year round workers. Don't mess with the parking spots on Main St. leave them as angle parking.
- Need more info...to comment here
- Need more medical centres (24 hour). Think town could use swimming pool. Expansion of highway widening it.
- no jaywalking and a few stoplights
- No more seasonal short term rentals
- No things are very well managed
- No you guys screwed the young people
- None
- None I can think of at the moment
- Nope
- Not at this time
- Not really we're doing okay
- Not really.
- Not sure
- Not sure
- Not sure
- Not sure
- Not that I can think of
- not that i know off
- Not to change angle parking on main
- Only allow rowboats on the lake.
- Osoyoos can increase funding and activities for youth aged 8-18. Year round and summer season. More docks and slides at the beach.
- Osoyoos certainly does not need city hall to be beach front property at tax payers expense. Stick city hall in a shack in the corner and sell that chunk to provide capital for something actually useful
- Osoyoos has to keep up its the evolving tourism industry or we will loose tourism dollars to towns which provide more services and retail opportunities.
- Osoyoos municipal govt should have affordable housing and short-term housing supported by those tourism dollars. "Careers" is a big word for the sector - 90% are low paying jobs, no place to live, no benefits. Only management jobs can be called careers and many of those have no pensions.
- Osoyoos needs a state of the art Recreational Centre, to attract sports enthusiasts to our beautiful town
- Parallel parking is a terrible idea, along with a walking Main Street. It is already difficult during busy season, please don't make it harder.

- Perhaps there could be proactive measures taken for all support staffing during high impact tourists times. Staffing and staff housing is a huge interest that does not get addressed in any appropriate manner
- Please keep our angle parking
- Police boat could be out patrolling more often
- Probably but I don't know what. I am newer to Osoyoos and would be nice to know how the funds generated by tourism give back to Osoyoos infrastructure. Only thing I see going up are homes but not much being done to the downtown area.
- Prohibit short term rentals that do not have a motel/hotel or B&B license
- Promote all accommodations equally - not just the top few that are high end. Let people know we have a diverse selection and it's not all \$450 a night in the summer. We may be pricing ourselves out of the marketplace.
- Provide affordable housing for seasonal workers
- Provide better facilities for summer workers
- Provide options for housing for year round employees to draw skilled labour here. Have commuter transportation for employees to live outside Osoyoos and work in Osoyoos. Develop winter tourism.
- Putting in walking overpasses
- Real job is what keeps a town functional. Seasonal employment is not only low income but also part time. One must remember tourism is a luxury and most live well beyond their means so as time goes on and things get tougher with a 30% inflation increase in the last year. It's will take its toll that being said. The cost of spending a week in Osoyoos in July. I could take a break in the cold months and spend the same amount of money for a 4 week holiday in Mexico. Just saying. You can thank COVID for grounding people within their own nearby area. 2020 was probably the biggest tourist year for Osoyoos and it was a Zoo. We do not have the infrastructure to accommodate and the thought of changing the parking system in town is beyond silly. Many do not like to parallel park and it would eliminate 50% of the parking spots in town.
- Redirect the highway to reduce the dangers of the high rate of traffic that passing through the down town area known as Main St..
- Remove the fossils from city council
- Road bypass for big trucks/very noisy
- Roving town ambassadors
- significant increase in support for safe and plentiful boating (ramps, docks, marinas, gas), significant increase in street parking for tourists and organized parking for boat trailers and RVs, slower speed limits on residential streets in summer, increase in night police patrols, traffic directing at boat ramps, more campsites
- Somewhere for young people to gather and enter act all year round
- staff housing for workers

- Start paying attention to the needs of the actual residents who pay municipal taxes. Tourism is both seasonal, unreliable, and unsustainable as a primary source of income for most actual residents who earn minim wages and pay exorbitant prices for the price ledge of working like a dog every damn day to make vacations nice for millionaires. I have lived in third world countries that have more shits about their permanent residents
- stop messing around with parking on main street.
- Stop lights at lakeshore and 97
- Stop spending money and lower taxes
- Store hours
- Stricter law enforcement (punishment and presence).
- stronger bylaw enforcement
- Take Osoyoos residents suggestions more seriously!
- Take the drive through traffic out of downtown
- Tell them to bring good manners with them!
- The older motels could be such wonderful boutique motels
- The tourists drive up the prices and create over crowded restaurants and stores
- Town has to put more money into road infrastructure-traffic light-eg. Lakeshore drive and hwy. Bypass system for large trucks and traffic driving thru downtown and parking.
- Traffic - I feel that Osoyoos was not built to host as many people that we host in the summer and traffic congestion is the worst.
- Traffic, High prices for accommodation & campgrounds
- Use more tourism dollars on attractions and festivals like the car show that moved to Oliver because Osoyoos couldn't be bothered to put the effort into hosting it. Bring music and wine events to the area. Cater to young people not the retired because young people spend money. Encourage new business in main street that cater to young ppl instead of old lady dress shops. Live the farmers market but it is expensive to have a stall and produce is way over priced. Etc, etc. Osoyoos has become a very boring little town that is full of old people who don't want change.
- Visual improvements to the new pedestrian only street near BMO including bicycle lock up racks, more food trucks (with less bureaucracy for applicants *first hand accounts. Less law enforcement/bylaw visibility in peak seasons i.e. more discrete; less "police state". More benches, cigarette ashtrays on main
- We desperately need housing for the working class , there are too many 50+ community's that restrict the young from living and working in town
- We have a good thing going here. Let's just make small improvements where we can.
- We need another access point on the east side. The bridge is small, too many people park on the road to go to the beach and it congests the already SLOW traffic. It is difficult to get down Main St for anything in high tourism and the big trucks have no

choice but to follow that route through town as well. This slow congested traffic makes locals less patient and far less tolerant of tourists.

- We need more affordable housing for locals.....
- We need more by law officers.
- Well paying gigs for musicians!
- Why won't you do anything for local teenagers?
- Wider roads and highways. Some kind of bypass around town. An accident on the one bridge and nobody can get around from east to west or...
- Work faster when repairing roads and other infrastructure.
- Yeah support it but create an economy outside of tourism. Look at house prices compared to wages. Look at your rental market. It's just flat out not desirable to live here and get ahead
- Yeah, have better quality water for showering.
- Yes keep the angle parking and more sets of lights
- Yes should appreciation and consideration for the local residents with a discount card for shopping