













TOURISM IN BC

Supporting our Vibrant Visitor Economy
Fall 2024

Destination British Columbia acknowledges with gratitude the x^wməθk^wəý əm (Musqueam Indian Band), Skwx wu7mesh Úxwumixw (Squamish Nation), and səlilwəta! (Tseleil-Waututh Nation) on whose shared territories we operate our main office.

We respectfully recognise that we carry out our work on the territories of Indigenous Peoples throughout BC. We honour our ongoing and developing relationships with First Nations (status and non-status), Inuit, and Métis Peoples. We are on a path of learning and are committed to working together.

As an organization, we are committed to the United Nations
Declaration on the Rights of Indigenous People's Act, the Truth
and Reconciliation Commission of Canada: Calls to Action,
the BC Declaration on the Rights of Indigenous Peoples Act,
and the Declaration Act Action Plan. We are working with
the Government of BC, Indigenous Tourism BC, and the tourism
industry to develop and implement actions of reconciliation.
This includes the development of an action plan for Destination BC
and collaboration with Indigenous communities interested
in the benefits of tourism.







Note: Tourism data Destination BC published prior to 2024 was recently updated by BC Stats and may not fully align with values previously published in 2023, due to updated information from Statistics Canada and updated methodology by BC Stats.

THE VALUE OF TOURISM

There is incredible opportunity within British Columbia for tourism. The tourism industry is a key driver of economic success across BC—growing and supporting revenues, employment, wages, and visitors.

Residents of BC need to know about the importance of BC's visitor economy, how it enriches all our lives by contributing to our collective social, cultural, environmental, and economic well-being, and why they should travel within their own province.

In 2022, the tourism sector in BC generated \$18.5 billion in annual revenue. From the smallest rural adventure guide business to our largest city-based hotel, we recognize that deep, collaborative partnerships enhance the value of the tourism industry across BC.





WHO WE ARE

Destination British Columbia is a Provincially funded, industry-led Crown corporation that facilitates a strong and competitive future for BC's tourism industry through a combination of global marketing, destination development, industry learning, cooperative community-based programs, and visitor servicing. Our programs help to improve the visitor experience, and strengthen BC's worldwide reputation as a destination of choice. We support regions, communities, sectors, and Indigenous communities with the development and expansion of tourism experiences, businesses, and jobs.



Our purpose is to improve the quality of life for all people living in BC, through tourism, and share the transformative power of BC experiences with the world, in a socially, culturally, environmentally, and economically sustainable way. This acknowledges that stewardship of the industry is rooted in principles of diversity, inclusivity, reconciliation, and partnership.

Tourism has a bright future in BC, and we will build on our sustainable, competitive advantage of a collaborative tourism ecosystem which is hard for other destinations to imitate. Our corporate strategy is supported by tactics identified in our marketing, destination and industry development plans; to review these, visit <u>DestinationBC.ca</u>.



GOALS

BUSINESSES

Tourism businesses are profitable



TRAVELLERS

People love travelling in BC



RESIDENTS

People living in BC value the visitor economy



DISPERSION

People travel year-round to both known, and lesser-known places



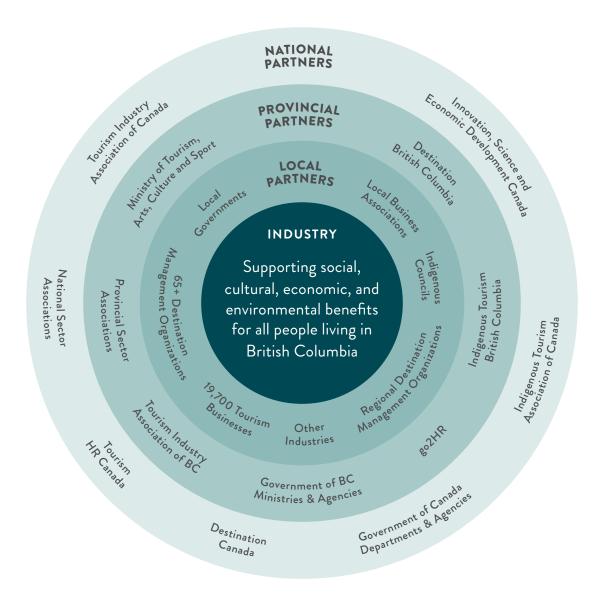
ENVIRONMENT

The tourism industry meets or exceeds BC's Climate Change Action Plan targets

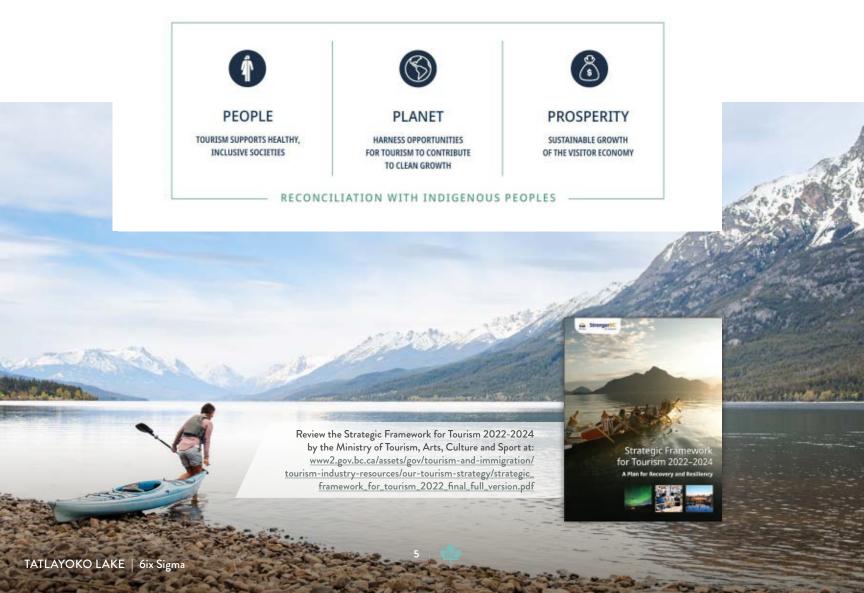


BC'S TOURISM INDUSTRY

BC's tourism industry is comprised of numerous organizations and partners whose tightly interconnected ecosystem markets the best of our province while supporting individual communities.



BC's Ministry of Tourism, Arts, Culture and Sport leads alignment of provincial tourism priorities, sets the strategic direction, and works with various facets of the industry. The Ministry's guiding document for the tourism sector is the <u>Strategic Framework for Tourism in BC</u>, which establishes a clear vision for a prosperous and sustainable tourism sector, in a way that benefits people throughout the province. Ministry staff also collaborate closely with Destination BC to facilitate responsible tourism growth and development.



TOURISM ECONOMIC IMPACT AT A GLANCE



2022 ANNUAL REVENUE

\$18.5 Billion

Source: BC State



EXPORT REVENUE

\$3.3 B

Source: BC Stats



+44.9%

in real GDP growth for 2022 compared to 2021

Source: BC Stats

JOBS IN 2022

154,366

=

+94.5% increase over 2021

Source: BC Stats



\$16.3 B

total in restaurant receipts in 2023

Source: Statistics Canada



25M

YVR passengers in 2023

Source: YVR



69% occupancy rate in BC hotels in 2023

Source: STR Data Tabulations



4.8 M

international overnight visits in 2023

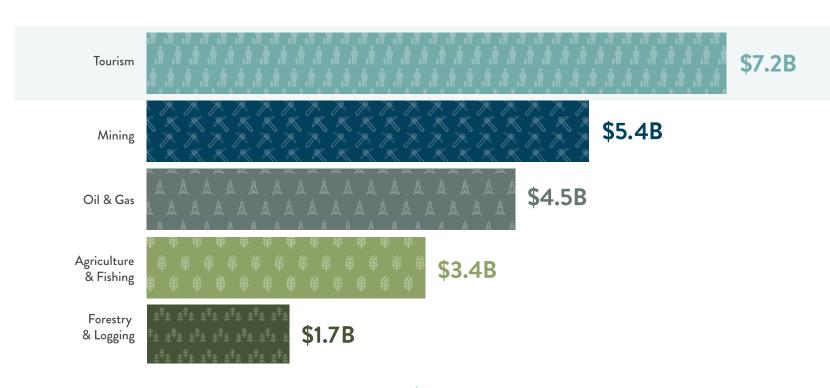
Source: Statistics Canada

BC GDP

Tourism is considered one of BC's leading economic base and natural resource sectors, and has significantly contributed to BC's GDP in recent years.



2022 GDP BY PRIMARY RESOURCE INDUSTRY



Source: BC Stats 7



ECONOMIC SPINOFFS

In BC, tourism's spinoff benefits exceed that of many industries. Most tourism businesses directly support the provincial economy by buying goods and services locally, hiring staff locally, and retaining profits locally. Tourism also generates benefits that other industries can leverage, including development of infrastructure, increased trade opportunities, and improved access to international markets.



VALUE OF TOURISM FOR RESIDENTS

The tourism economy makes life better for all people living in BC. Not only does the industry contribute to our economic wellbeing, but it also enriches our lives by supporting a greater range of amenities used by BC residents. Recreation sites, arts and culture, attractions, parks, restaurants, resorts, and events wouldn't flourish without tourism.

Tourism also offers a wealth of career opportunities for BC residents—in fact, the industry is the largest employer of youth, who represent more than 30% of its workforce. More than 100,000 new job openings will be available in BC's tourism industry by 2028, allowing entrepreneurs to transform their passions into businesses, Indigenous guides to share their cultural history with visitors from around the world, world-class chefs to merge global influences with local ingredients, and ski instructors to combine work and play on world-class mountains in BC.

Tourism's positive impact extends beyond economics and job opportunities to social, cultural, and environmental advantages. The industry has helped to increase awareness of Indigenous culture and heritage in BC, with Indigenous Tourism BC championing the creation and marketing of authentic visitor experiences province-wide. Tourism also plays a positive role in preserving, sharing, and celebrating the rich culture and history of diverse communities and people in BC.





BRITISH COLUMBIA BELIEVES IN TOURISM

RESIDENT PERCEPTIONS OF BRITISH COLUMBIA'S TOURISM INDUSTRY

80%

of British Columbians value the contribution visitors make to their local economy

79%

of BC residents agree their community is a desirable place to visit 72%

of British Columbians feel that tourism contributes positively to the quality of life in their community

78%

of BC residents agree tourism supports a greater diversity of amenities

75%

of BC residents agree the positive impacts of tourism in their community outweigh the negative impacts

75%

of BC residents take pride in making visitors feel welcome

78%

of BC residents agree the Government of BC's investment in developing tourism infrastructure is important



BC TOURISM OPPORTUNITIES AND CHALLENGES

Tourism Growth: The tourism industry in BC is experiencing uneven but promising growth. In 2023, international travel returned, with visitation reaching 80% of 2019 levels. Certain key international markets are showing strong growth. Overall, international visitation is expected to return to 2019 volumes by 2026.

Hyper Global Competition: There is hyper global competitiveness for the high yield international traveller.

Consumer Travel Behaviour: Consumer travel consumption behaviours have changed as pent up demand continues to support pandemic recovery, and travel remains a budget priority.

MRDT: Funding through Municipal and Regional District Tax (MRDT) revenue is now comparable or higher than 2019 level for many communities.

Accelerated Digitization: The evolution of marketing practices requires continued focus on accelerated digitization and decision making.



UNDRIP: British Columbia is committed to implementing the Truth and Reconciliation Commission of Canada: Calls to Action, the United Nations Declaration on the Rights of Indigenous People Act, and the BC Declaration on the Rights of Indigenous Peoples Act Action Plan.

People & Communities: People and communities expect a core role in determining the future of tourism in their community.

Labour: Labour shortages continue to be a challenge for many tourism businesses.

Global & Social Forces: Global and social forces, like climate change and an increased focus on Diversity, Equity, Inclusion and Accessibility, have changed the landscape within which tourism operates.

Diverse Tourism Ecosystem: Destination BC is one part of a large and diverse tourism ecosystem, including marketing, destination development, funding, stewardship, climate change, emergency management, industry learning, business support, visitor services, and experience development.

Taxpayer Funded: Destination BC is a taxpayerfunded organization that exists to improve the lives of all people living in British Columbia through the tourism industry.

HOW DESTINATION BC SUPPORTS TOURISM

FOR VISITORS



In-destination travel information

BC travel information in multiple languages



Support for accessibility

Travel itineraries and recommendations



FOR BUSINESSES



Global promotion

Research and insights to support decision making





Training and development opportunities

Funding to support Indigenous tourism businesses



FOR COMMUNITIES

FOR RESIDENTS



More than \$4.38 million in co-op marketing funds across the province through 63 initiatives for 2024-2025



\$2.1 million annual funding for Visitor Services Network members in 2024

(community-based visitor centres)



Access to over 20,000 images and videos shared through the BC Content Hub



78% of BC residents agree tourism supports a greater diversity of amenities

Source: Destination BC's 2023 Resident Perceptions Survey of BC's Tourism Industry



Brand advice and alignment with Super, Natural British Columbia®



72% of British Columbians feel that tourism contributes positively to the quality of life in their community

Source: Destination BC's 2023 Resident Perceptions Survey of BC's Tourism Industry



Public awareness of the large and growing workforce tourism provides



Assistance to help communities to enhance experiences for tourists and locals



Collaboration with all levels of government to ensure tourism benefits to people in BC



Support for community cultural and recreational assets



MARKETING BRITISH COLUMBIA



MARKETING PROGRAMS

Destination BC's programs have enhanced collaboration across the industry, cultivated likeminded networks within the vast tourism ecosystem, strengthened short-term competitiveness through marketing, and driven long-term competitiveness through destination development.

We market BC domestically and internationally using an array of online and offline tactics. Our marketing extends across the globe, inspiring millions of people to choose BC as their next travel destination. Instead of relying on triedand-true tactics, we constantly innovate—and the result is attention-grabbing consumer, travel trade and travel media marketing that inspires urgency to visit BC, now.



SUPER, NATURAL BRITISH COLUMBIA

Super, Natural British Columbia® represents the essence of our province. For nearly 40 years, our brand has inspired millions of people to visit BC and continues to be highly regarded among global audiences. This brand is memorable and distinctive from other destinations, promising an unparalleled travel experience that leaves visitors profoundly changed.

People around the world carry exceptionally positive perceptions of BC. We are known as strong, free-spirited, adventurous, open, and generous—characteristics that are particularly coveted in today's society. And now, this well-established brand will provide greater depth and meaning for visitors as the new Iconic routes and places showcase the unique differences of various areas across the province.



OUR WORK WITH PARTNERS



Marketing Partnerships Program
enables groups that share common
marketing goals—including
community consortiums, sector
organizations, and approved
individual and paired communities—
to access private and public funds,
and achieve greater marketing
impact and revenue. To qualify,
group goals must align with provincial
tourism priorities.

The Co-op Program supports the provincial tourism strategy to sustainably grow the visitor economy through innovative marketing and to increase tourism revenues which provide social and economic benefits for residents of BC.

For 2024–2025, the program provided more than \$4 million to support destination and activity-specific tourism marketing initiatives across BC. The 2024–2025 program will support 68 initiatives for key tourism activity sectors and community consortiums: groups of communities, Indigenous communities, regions and regional districts, business associations, and other community partners who come together to collectively market their unique selling proposition that links them together.



The Municipal and Regional District

Tax (MRDT) was introduced in

1987, by the Government of BC,
to provide funding for local tourism
marketing, programs, and projects.

The tax is intended to help grow BC revenues, visitation, and jobs, and amplify BC's tourism marketing efforts in an increasingly competitive marketplace.

The MRDT is an up-to three percent tax applied to sales of short-term accommodation provided in participating areas of BC on behalf of municipalities, regional districts and eligible entities.

The MRDT is jointly administered by the Ministry of Finance, Ministry of Tourism, Arts, Culture and Sport, and Destination BC.



LEARNING CENTRE

Discover free, 24/7 professional development tailored for BC's tourism industry through Destination BC's online Learning Centre, accessible via DestinationBC.ca. Since it launched in 2019, this comprehensive resource hub has provided a wealth of materials covering diverse topics such as accessibility, social media management, and more. Each topic is complemented by articles, guides, templates, checklists, videos, and custom content designed to help tourism businesses enhance their marketing strategies, improve visitor experiences, and achieve measurable business success. Additionally, registration for all of our workshops, as well as access to key learning opportunities from our partners, is conveniently available through the Learning Centre.



Learning Centre available at DestinationBC.ca/learning-centr



An inclusive and accessible tourism industry means eliminating and preventing barriers to ensure greater opportunities for equity deserving groups. This work spans well beyond our built environment and includes employment and marketing efforts, and it begins by creating awareness.

Destination BC has developed an action plan that prioritizes the nine key areas. Action items included here are initial areas of focus and will continue to be built upon as we learn and progress.

Two key goals will support an inclusive and accessible industry:

- 1. Industry has the skills and tools to deliver inclusive and accessible tourism experiences
- 2. Destination BC authentically represents the diversity of people in BC in our marketing.

ACTION PLAN KEY AREAS

- Inclusive Storytelling
- Content Accessible to All
- Inclusive Language and Tone
- Inclusive Visuals
- Incorporate Lived Experience
- Improve Indigenous Representation
- Supporting and Developing the Global Marketing Team
- Supporting Tourism
 Industry Partners
- Measuring Our Success



Destination development is the strategic planning and advancement of defined areas to support the sustainable evolution of desirable destinations for travellers, with a sole focus on the supply side of tourism, by providing compelling experiences, quality infrastructure, and remarkable services to entice repeat visitation.

Destination BC offers destination development planning assistance, in partnership with Indigenous Tourism BC, the Ministry of Tourism, Arts, Culture and Sport, and Regional Destination Management Organizations, to support the ongoing viability of BC's tourism sector using an approach that ensures alignment with community aspirations and values, and is informed by the principles of destination stewardship to ensure tourism benefits local communities. Across the province, multiple 10-year destination development strategies have been created, along with regionally specific strategies. Provincially, the Invest in Iconics Strategy is a long-term strategy to responsibly increase tourism revenue and visitation to BC through the integration of place branding and destination development.

With destination development, we envision BC as a worldclass tourism destination which offers remarkable products and experiences that are authentic, driven by visitor demand, and exceed expectations. By working together with a wide variety of partners, the strategies will guide the long-term growth of tourism experiences and revenues within the province.



The success of any tourism destination hinges on the quality of the visitor experience.



As a key a source of current and relevant travel information, destinations must keep pace with the convenience, speed and channel availability expected by visitors, and provide support swiftly and seamlessly. To ensure exceptional customer service, Visitor Servicing professionals must provide personalized and meaningful support swiftly and seamlessly. Visitor services is key in local communities, providing benefits through partnership with local entities, supporting tourism.

There are over 130 community-owned Visitor Centres throughout British Columbia that make up the Visitor Services Network Program. In 2023, the community Visitor Centres served over 2 million visitors face-to-face at their physical locations and around their community, and through email, over social media, and on the phone.



First Nations communities are at the heart of culture and tradition in BC. Since time immemorial, their ways of knowing and being have been deeply rooted and intertwined with the land, water, and sky. This connection is how Indigenous tourism was born. More than ever, travellers are looking for meaningful experiences that introduce them to cultures that differ from their own. There are 204 First Nations communities across the province, each with their own culture, history, and traditions. There are over 35 language groups, more than 60 dialects, and more are being reawakened. Indigenous tourism offers some of the most diverse and authentic cultural experiences in the world. Today, there are over 400 Indigenous tourism-related businesses in BC offering a wide range of experiences, from art galleries and cultural centers to wildlife tours, wellness retreats, and accommodations.

GROWING INTEREST IN CULTURAL TOURISM

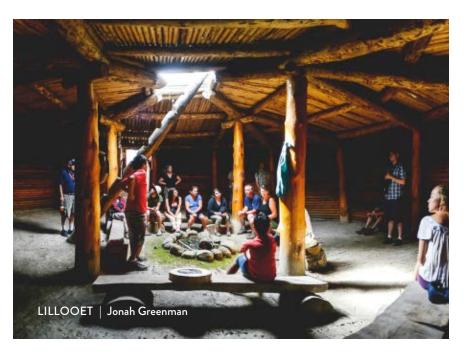
The growing interest in cultural tourism creates new opportunities for Indigenous Peoples in BC to determine how and when their cultures and stories are shared. Indigenous tourism creates an opportunity where Indigenous Peoples can invite visitors to learn about their traditions, languages, histories, and stories.

INDIGENOUS TOURISM BC AND DESTINATION BC

For more than two decades, Destination BC and Indigenous Tourism BC have worked in partnership. We respect Indigenous Tourism BC's leadership in Indigenous tourism and maintain our shared commitment to support a sustainable, authentic Indigenous tourism industry in BC. We will continue this collaborative partnership and walk side by side on a journey toward truth and reconciliation that enables economic sovereignty for Indigenous communities, Peoples, and businesses in tourism.

RESPECTFUL GROWTH OF INDIGENOUS TOURISM

Destination BC is committed to the respectful growth of Indigenous Tourism. By contributing to the respectful growth of Indigenous Tourism, Destination BC is developing meaningful and collaborative relationships with Indigenous Peoples and communities and supporting connections between Indigenous and non-Indigenous Peoples through our programs and services.



KEY PRIORITIES FROM 2023-2025 CORPORATE STRATEGY

- Develop a plan to guide our organization on a path towards Truth and Reconciliation, and help us focus our efforts.
- Continue the collaborative partnership with Indigenous Tourism BC that upholds and respects our shared commitments.
- Develop relationships with Indigenous communities and engage actively with those interested in tourism.

INDIGENOUS TOURISM BY THE NUMBERS

- In 2017 there were approximately 401 Indigenous tourism related businesses operating in BC.
- In 2017, generated in total economic impacts (direct, indirect, induced) \$1,271 million in output (equivalent to GDP of \$970 million).
- Created more than 400 direct full-time jobs.
- The Indigenous tourism sector was outpacing the overall tourism sector growth both in BC and throughout Canada. 1 in 4 visitors to BC actively seek authentic Indigenous experiences.
- The number of overnight visits to BC, which included some form of Indigenous cultural tourism, increased by an estimated 27% between 2013 and 2016 to approximately 3.6 million visits.



EMERGENCY PREPAREDNESS

Emergencies can impact travel, visitors, and businesses at any time, and potentially influence those who may be planning a trip to our province.

Destination BC is part of the provincial Tourism Emergency Management Committee (TEMC). Destination BC's work with the TEMC includes communications, marketing, research support, and coordinating efforts across industry and with overseas partners.

Examples include developing messaging guides for industry, coordinating with marketing teams to shift what's inmarket based on the latest information, and developing recovery marketing campaigns once an emergency is over. This work does not stop when a crisis is over. Resources are created year-round to help support BC's tourism industry with emergency planning and preparedness.

<u>Destination BC's Emergency Preparedness page</u> shares all official resources available to industry before, during, and after an emergency and is updated on an on-going basis.

BC's Tourism Emergency Management
Framework, produced by the TEMC,
supports the safety of visitors, the viability
of tourism businesses, and our reputation
as a safe and welcoming destination in a provincial or
multiregional emergency.

wipe for travel tips

The Framework was created in response to the increasing number of emergency events that impact BC's reputation as a desirable, safe, and welcoming place. The goal of the Framework is to support ongoing cooperation to protect the health and safety of travellers and to support a resilient tourism industry. This structure was designed to provide operational clarity and coordination to ensure there is alignment between the many levels of governments and organizations involved in the response.



The Invest in Iconics Strategy is a long-term strategy, developed in partnership with Indigenous Tourism BC, to responsibly grow the benefits of tourism across BC through the integration of Place Branding and Destination Development to competitively differentiate BC on the world stage.

The strategy focuses on increasing the benefits of tourism throughout the province. It provides the opportunity to re-imagine our province—creating iconic, inspirational routes and places that will strengthen travel appeal in all regions of BC, in all seasons. Long term, this strategy balances the capacity needs and market-readiness of our communities—focusing on shoulder-season growth in our cities and mature destinations, while fostering all-season growth in high-potential communities and rural destinations where capacity exists.



The BC Tourism Climate Resiliency Initiative (BCTCRI) is a provincial project dedicated to building a foundational program that supports a resilient tourism sector prepared to adapt to climate change. The initiative aims to ensure that BC's tourism industry is equipped with standard tools to track, measure, and improve sustainable practices, setting a solid foundation for long-term sustainability and climate adaptation within the sector.

The BCTCRI is comprised of four key projects that invest in facilitated sustainability and adaptation planning for tourism businesses, microgrants to support implementation, the formation of a data framework, and province-wide networking opportunities.

PROJECT 1: FACILITATED SUSTAINABLE TOURISM AND CLIMATE ADAPTATION PLANNING

This project offers free, customized support to tourism businesses, guiding them in developing sustainability and climate adaptation roadmaps with expert advice.

PROJECT 2: MICRO-GRANTS FOR IMPLEMENTATION

This project provides up to \$15,000 in micro-grants to eligible tourism organizations, enabling them to implement sustainability projects or obtain certifications based on their climate roadmap.

These two projects play an important role in helping BC's tourism industry transition to renewable energy and implement sustainability and climate action plans to adapt to climate change.



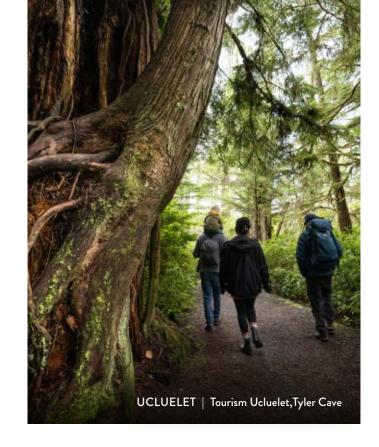
PROJECT 3: SUSTAINABILITY AND CLIMATE ADAPTATION DATA FRAMEWORK

This project is focused on developing and implementing a sustainability and climate adaptation data framework that encourages tourism industry alignment with policies and practices, common metrics, and data collection methods in the areas of sustainability and climate adaptation.

PROJECT 4: COMMUNITY DESTINATION STEWARDSHIP INITIATIVE

This project aims to build a provincial network across BC to enhance climate resiliency and sustainability in community destinations and the broader tourism industry by offering comprehensive learning through workshops and discussions, emphasizing peer-to-peer engagement and shared successes, and connecting communities to resources, programs, and initiatives that support sustainable business practices and community engagement.





BCTCRI PARTNERS

The BCTCRI and its representative projects are developed and delivered in collaboration with partner organizations, including the six Regional Destination Management Organizations (RDMOs), Indigenous Tourism BC, and the BC Ministry of Tourism, Arts, Culture and Sport working together to meet the goals of this initiative.

CONNECT WITH US

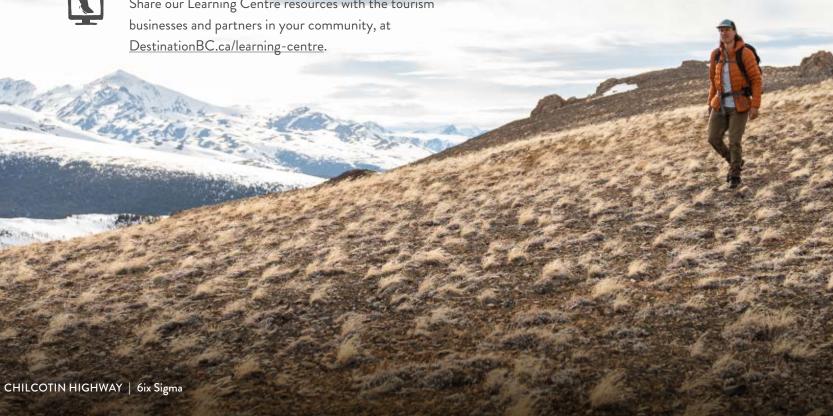
SUPPORT FOR YOUR COMMUNITIES Subscribe to our monthly newsletter for updates on 奧 tourism facts and research, partnerships, marketing campaigns and more (<u>DestinationBC.ca/Subscribe</u>).

- Follow us on LinkedIn.
- Share industry success stories and celebrate the value of tourism by using the hashtag #BCTourismCounts.
- Review Destination BC's resources and programs online 图 for additional information (DestinationBC.ca).
 - Share our Learning Centre resources with the tourism businesses and partners in your community, at

#EXPLOREBC

Follow us on Instagram, Facebook, and TikTok (@HelloBC).

> Support BC's truly remarkable experiences by promoting #exploreBC among visitors and residents alike-it's an impactful way to amplify our marketing efforts to a worldwide audience.









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