



Tourism Golden Annual General Meeting

Richard Porges, *President & CEO, Destination BC*

June 5th, 2025

Kicking Horse Mountain Resort | Destination BC, Ryan Creary

AGENDA

- **2025 Tourism Performance & Outlook**
- **DBC Update – The Iconics Launch**
- **The Importance of Tourism**

BC Tourism Industry Performance YTD

Kicking Horse River near the Kicking Horse Pedestrian Bridge

US Tariffs: Impacts on Tourism

- Some BC & Canadian travellers are switching from US to Canadian destinations
 - Anticipated and actual impacts of tariffs on household income is/will lead to some decline in travel
- Travel by Americans to BC and Canada is holding steady – anticipating modest growth in 2025
- Weakness in some overseas markets - Canada is out-performing US
 - Growing differentiation of Canada and the US in the minds of overseas visitors
 - Two Nation vacations will decline – increased opportunity to sell Canada only trips and mitigate loss
- Some weakening of Canadian resident sentiment to welcoming attitude toward American visitors

2025 Global Economic Outlook

Due to tariffs and political uncertainty, the risk of a global recession in 2025 increased from 40% to 60%.

- Most economists (92%) are viewing tariffs having negative repercussions for the global economy.
- Mexico, Canada and the US are forecasted to be most heavily impacted.
- Significant decline in forecasts for China & India.
- DBC is creating and updating scenarios (pessimistic, base case, optimistic) based on the most recent economic indicators and political impacts to inform plans and activities.

Reuters Economist Poll – GDP Growth 2025 Updated

	Current Forecast	Change from Jan'25
World	2.7%	-0.3%
United States	1.4%	-0.8%
Canada	1.2%	-0.6%
United Kingdom	0.9%	-0.4%
Germany	0.1%	-0.3%
China	4.5%	0.0%
Japan	0.7%	-0.4%
India	6.3%	-0.1%
Mexico	0.2%	-1.0%

Tourism Industry Performance 2025 YTD

BC Visitor Arrivals Jan. – March 2025

Market	%Δ over 2024 YTD
US Overnight	+2.4%
Mexico	-28.1%
Australia	-3.9%
China	+4.9%
Japan	+11.7%
South Korea	+7.0%
UK	-11.2%
Germany	+1.4%
Total International	-1.1%

BC Accommodations Data YTD (Jan. – April 2025)

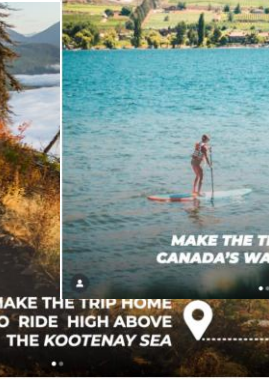
Occupancy: 62.6%
+0.6%

ADR: \$220
+1.7%



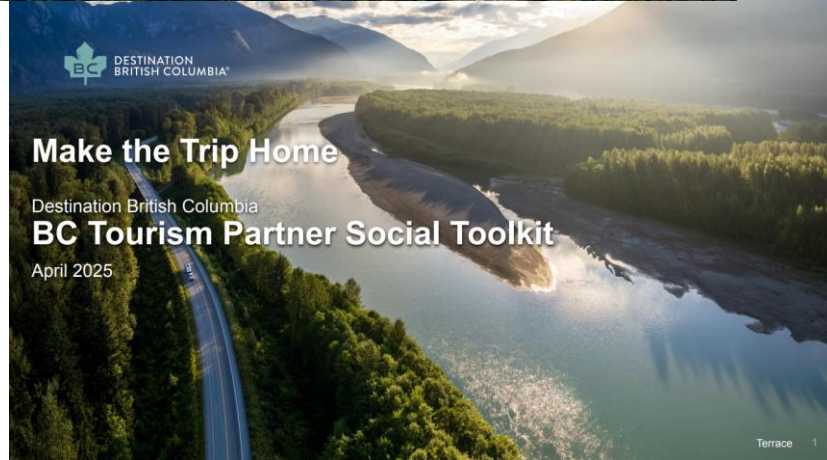
Recall where Easter fell in
2024 & 2025

Digression - Make the Trip Home Campaign



Domestic Campaign Summary

Objective	Motivate BC residents to plan a multi-day (5+ night) vacation in BC this summer and consider somewhere new.
Strategy	<p>This integrated marketing campaign will include two layers that nest together or live independently:</p> <ul style="list-style-type: none"> Part 1: Emotive (DBC-led)= concept to lean into wonder and connection, which will be distributed via owned, earned and some limited online media channels (budget limited) Part 2: Transactional (Partners) = Aligned with the concept, we are supporting BC tourism partners (ITBC, CDMO, sectors, businesses) to participate in social while maintaining partners' individual brand identities.
Focus Markets	<p>BC only</p> <p>Paid: BC residents aged 35+ located in urban centers (Vancouver, Victoria, Kelowna)</p>
Media Channel	<p>Owned (hellobc website, youtube channel, social channels)</p> <p>Limited paid: online only (youtube, Google, FB/IG and search)</p>
Timing	Paid: end of April - end of May



A person is seen from behind, standing on a white inflatable paddleboard in a river. They are wearing a red jacket, dark pants, and a white helmet, and are holding a black paddle. The river is surrounded by dense evergreen forests on steep slopes. In the background, majestic mountains rise, with some peaks partially covered in snow and shrouded in mist. A small waterfall is visible on the right side of the river. The sky is blue with scattered white clouds.

Looking Forward ...

Paddleboarding near Wapta Falls in Yoho National Park, Destination BC/Ryan Creary

KEY MARKET SIGNALS – SENTIMENT

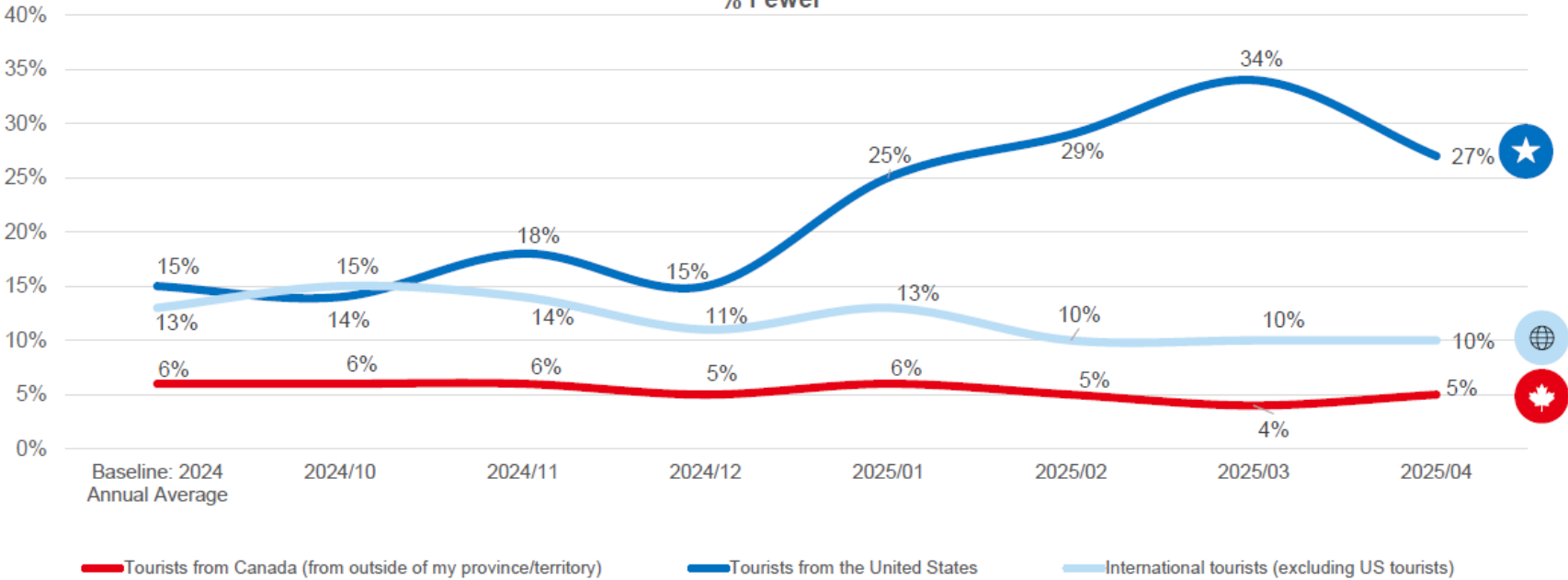
Traveller Sentiment in April 2025

Compared to the previous month (M-o-M, March 2025) and the previous year (Y-o-Y, April 2024)

Brand Metrics	Canada to Canada		US to Canada		Canada to US		Overseas to Canada		Overseas to US	
	M-o-M	Y-o-Y	M-o-M	Y-o-Y	M-o-M	Y-o-Y	M-o-M	Y-o-Y	M-o-M	Y-o-Y
Value Perception	0%	32%	7%	4%	-12%	-57%	3%	11%	1%	-20%
Recommend	-5%	19%	2%	1%	-24%	-59%	-1%	4%	8%	-19%
Travel Intent	3%	49%	31%	5%	3%	-54%	-8%	4%	-13%	-25%

Resident Sentiment Monitoring

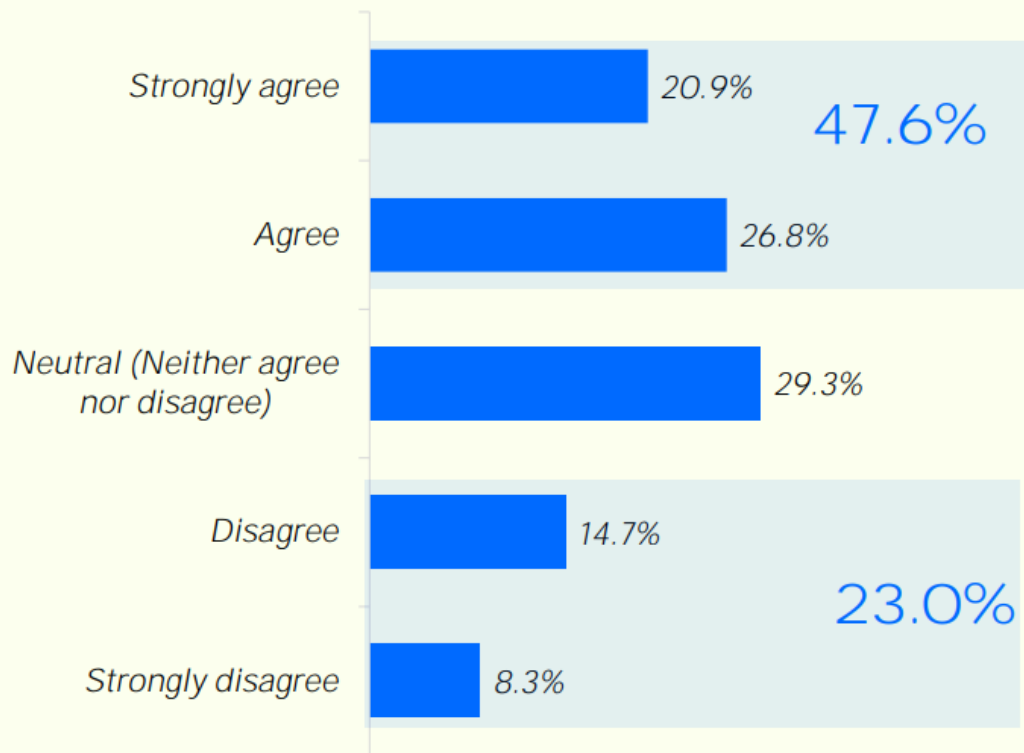
Percentage share of respondents stating that Canada should attract
Fewer Visitors of the following types in the future
% Fewer



Worry about how Americans are perceived is driving some international travel hesitation

Statement Agreement:

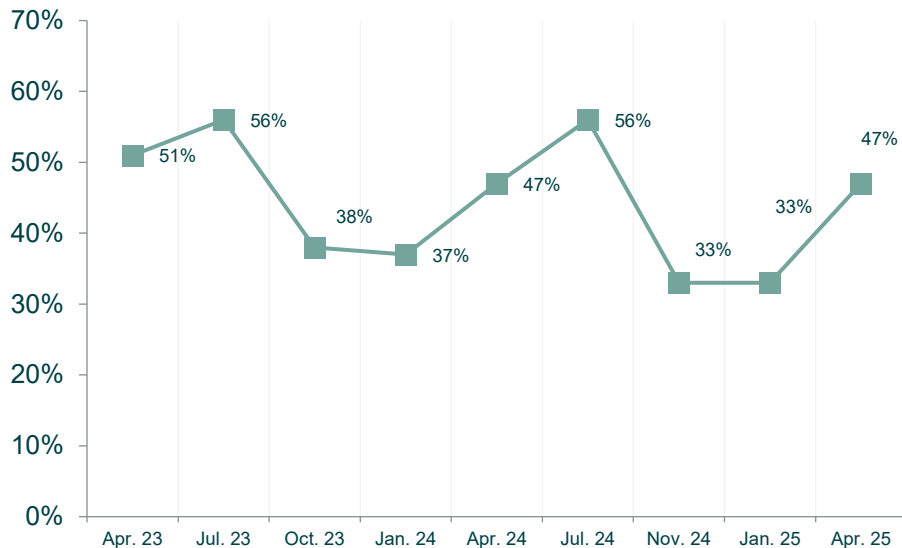
"I'm hesitant to travel internationally because I worry about how Americans may be perceived due to recent U.S. trade and tariff policies."



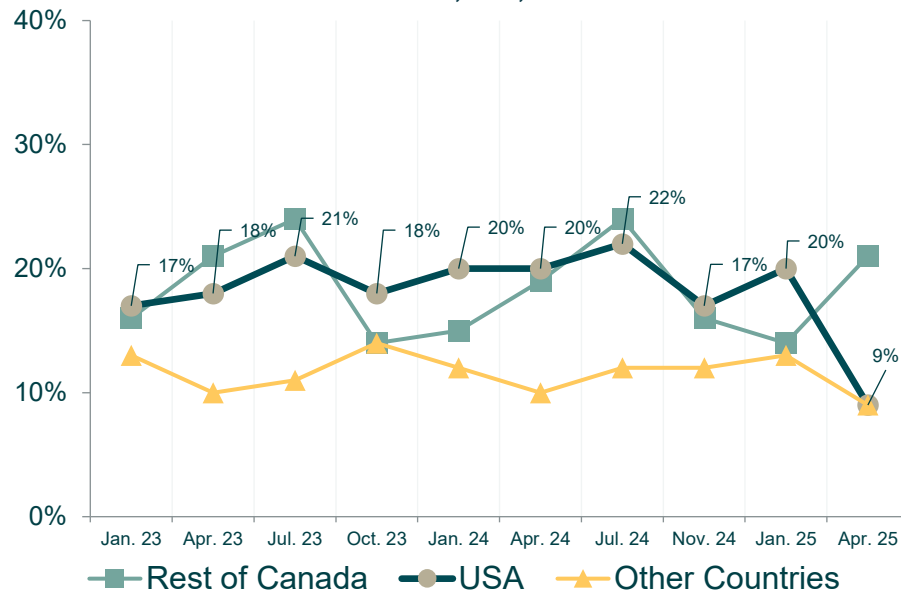
BC Resident Travel Intentions (Next 3 Months)

The likelihood of BC residents taking an overnight trip to the US has dropped significantly, while intentions for other destinations are within historical trends.

Likelihood of BC Trip



Likelihood of Overnight Trip:
Rest of Canada, USA, Overseas



Air Bookings: Domestic

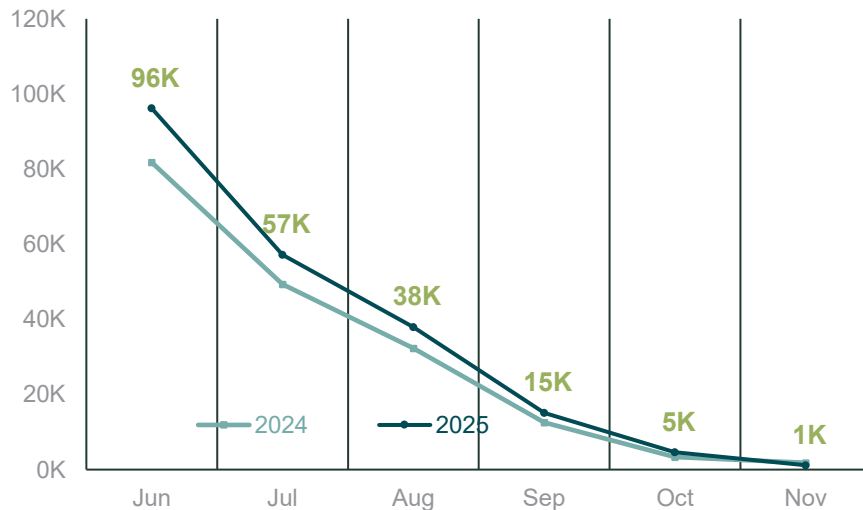


Domestic Air Bookings to BC are higher than last year from key provinces.



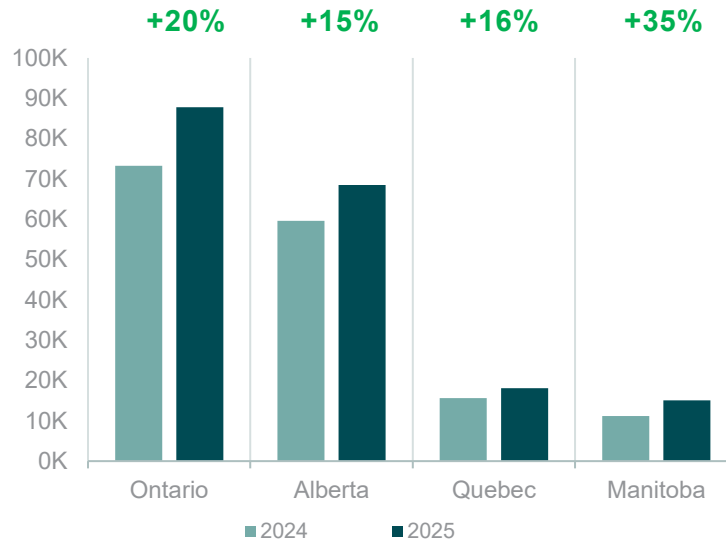
Domestic Air Bookings by Month

(Jun to Nov) **+17%**



Domestic Air Bookings by Province

(Jun to Nov)



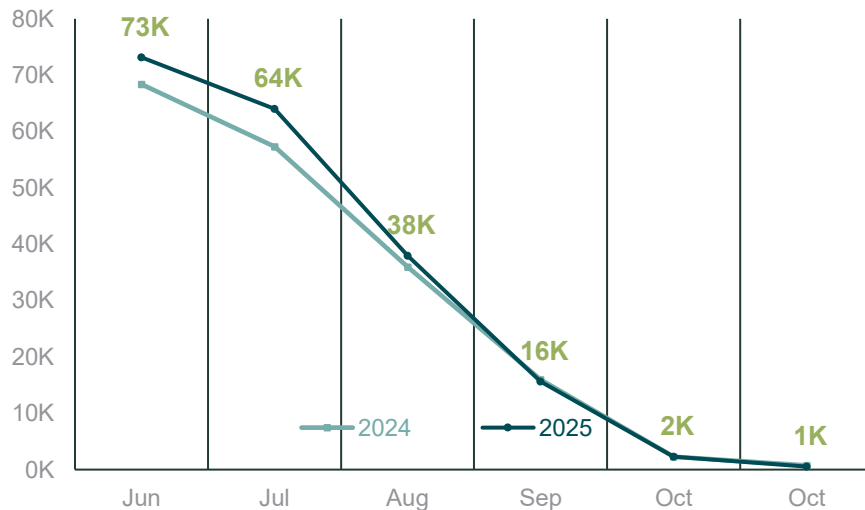
Air Bookings: United States



US Air Bookings to BC are showing increases through August, with most states showing improvements over last year.

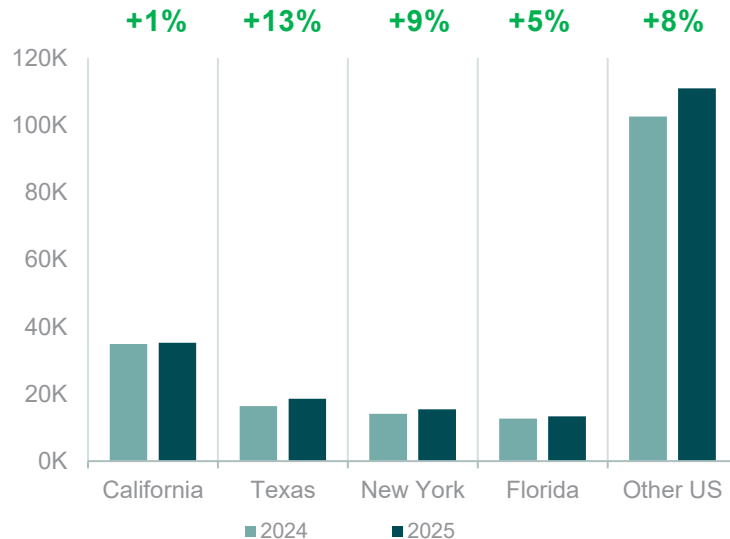
US Air Bookings by Month

(Jun to Nov) **+8%**



US Air Bookings by State

(Jun to Nov)



Air Bookings: Other International

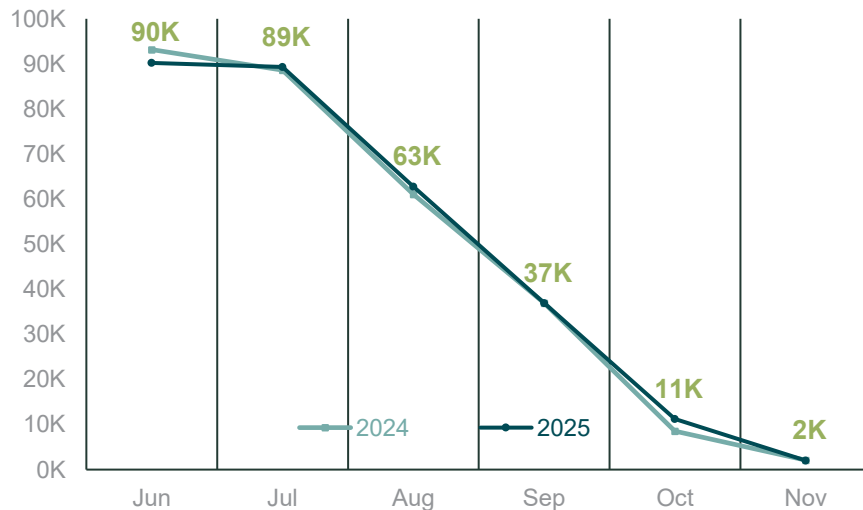


Overseas Air Bookings to BC are on par with last year, with large declines experienced in India and Mexico.



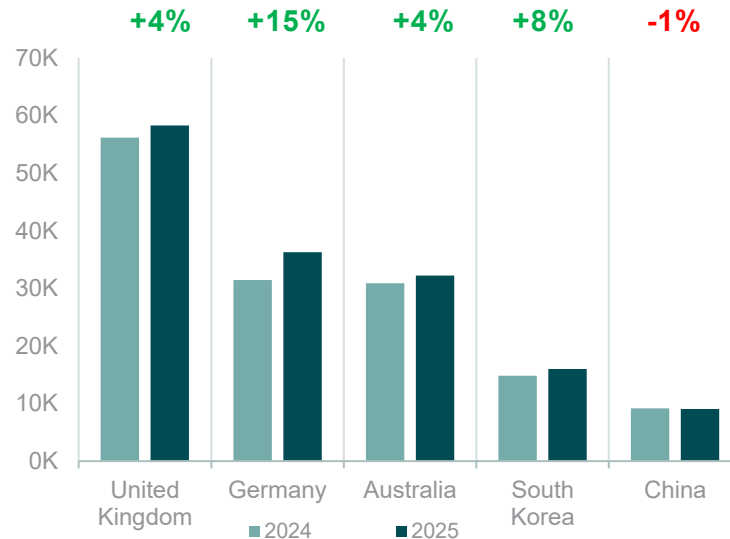
Overseas Air Bookings by Month

(Jun to Nov) **+1%**



Overseas Air Bookings by Country

(Jun to Nov)



2025 Outlook: Overnight Visitation



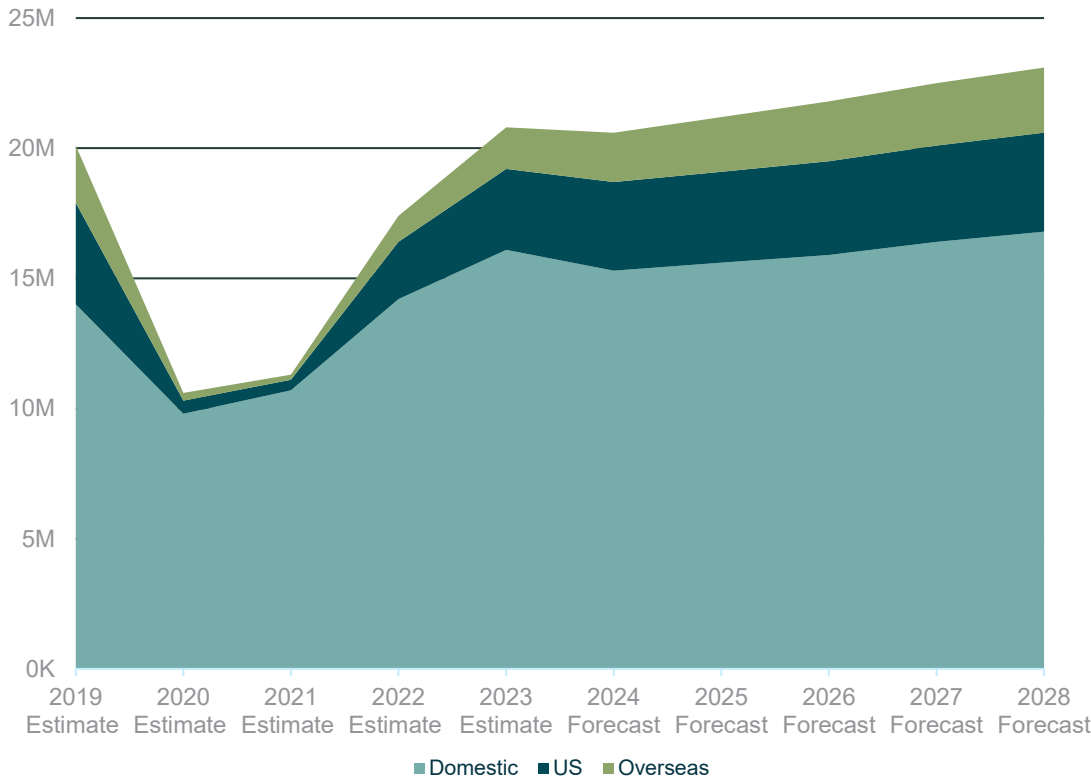
Overall 2024
Estimate

-1%

Overall 2025
Forecast*

+3%

Visitation Forecast



2024

2025*

-5%

+2%



+8%

+3%



Other
International

+16%

+5%

***Base Case
Scenario**

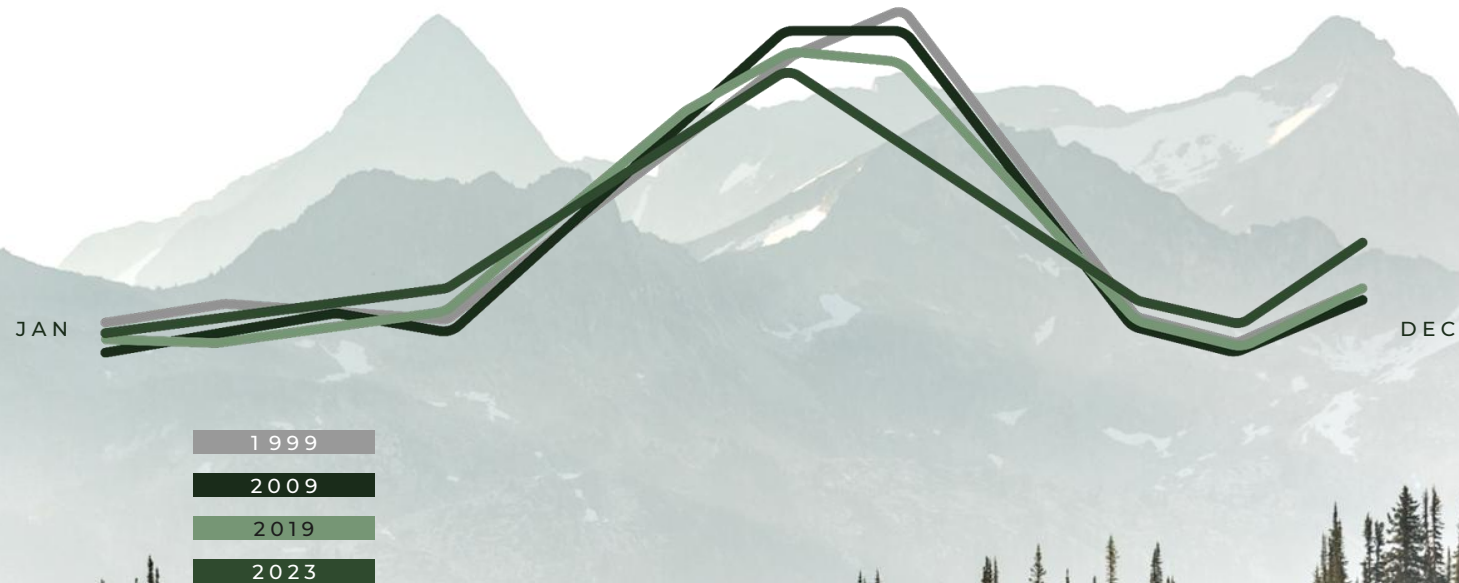
A person wearing a blue jacket and a yellow helmet is walking across a narrow suspension bridge made of wooden planks. The bridge is suspended by thick steel cables and is set against a backdrop of a steep, rocky mountain cliff. In the distance, a small building with a red roof is visible on a hillside under a cloudy sky.

Destination BC's Corporate Strategy Update: Launch of British Columbia's(Iconic) Places & Routes

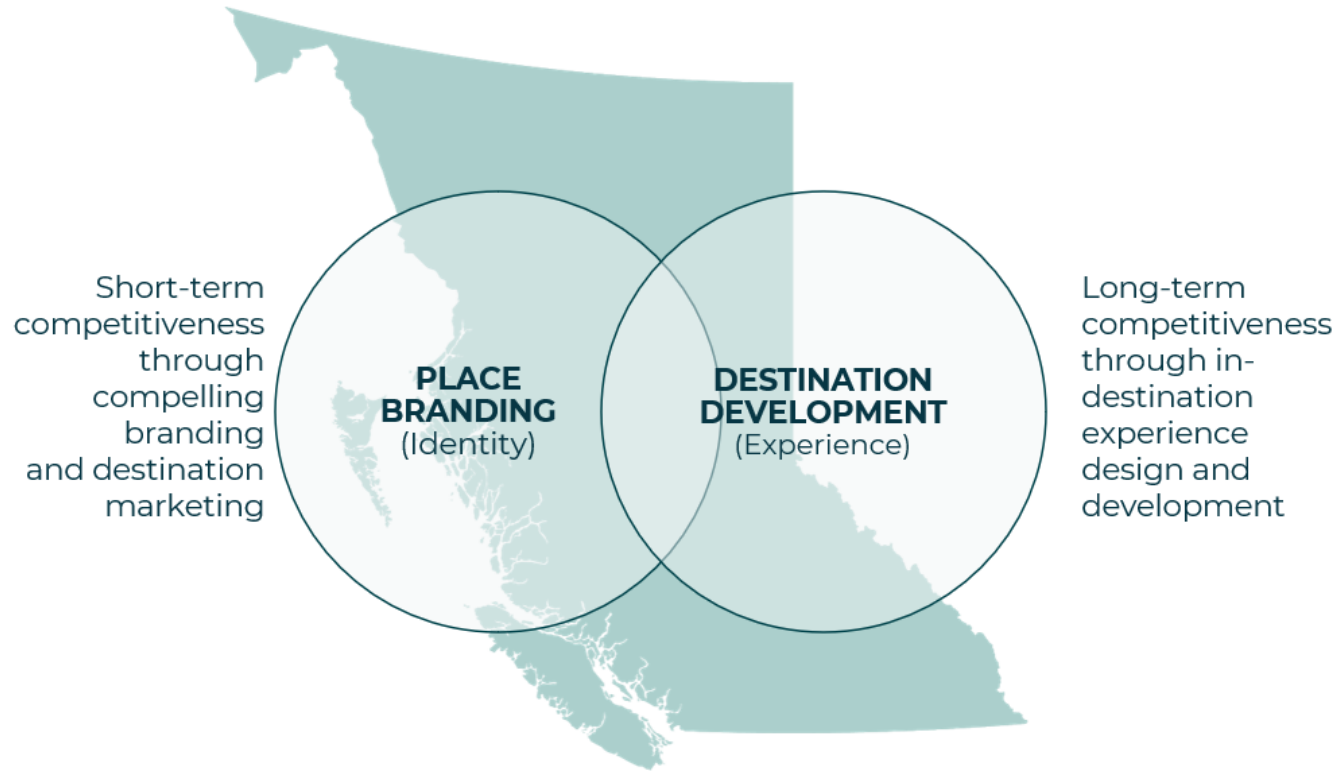
Kicking Horse Mountain Resort | Destination BC, Ryan Creary

The Problem

INTERNATIONAL VISITATION TO BC by Month



The Solution The Iconics Strategy



ICONICS MEASURES FOR SUCCESS

Increased visitation to more
places in BC in more seasons

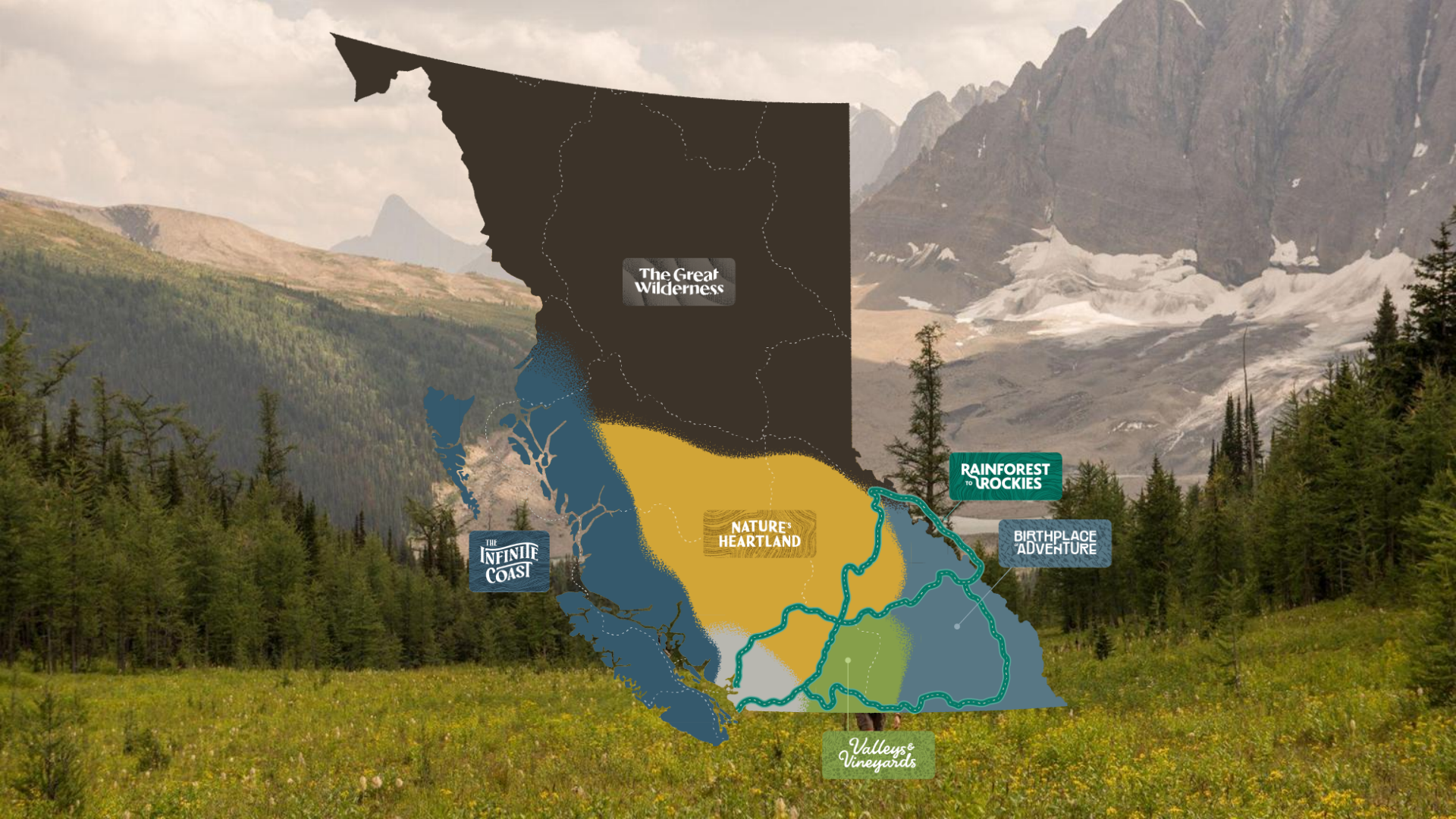
Higher average spend
and longer stays

More resilient, profitable
tourism businesses

Stronger investment in tourism
infrastructure and experiences

Improved resident sentiment and
meaningful reconciliation outcomes





The Great
Wilderness

THE
INFINITE
COAST

NATURE'S
HEARTLAND

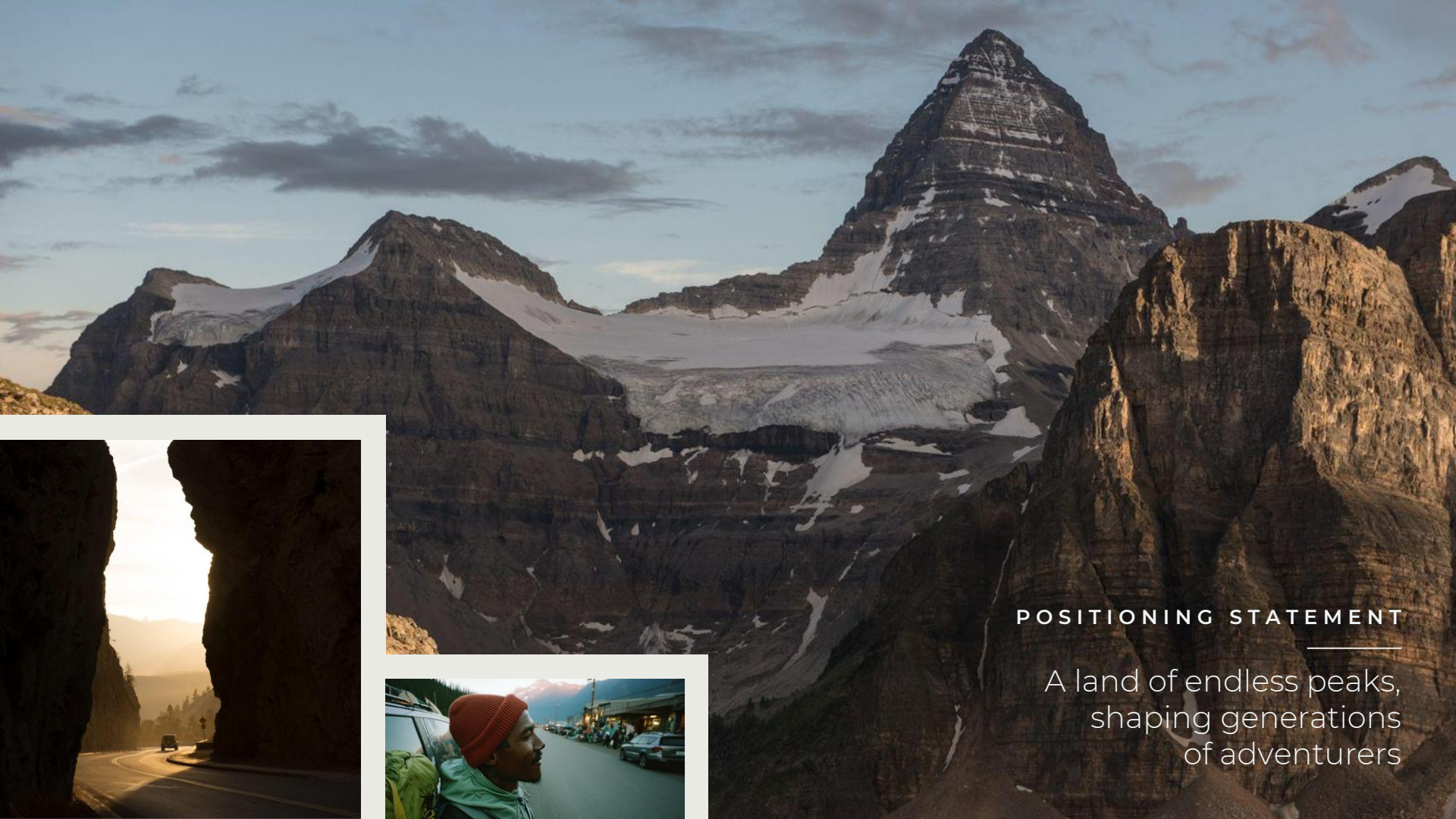
RAINFOREST
TO ROCKIES

BIRTHPLACE
ADVENTURE

Valleys &
Vineyards

Southeast BC





POSITIONING STATEMENT

A land of endless peaks,
shaping generations
of adventurers





NATURE PILLAR

Endless Peaks & Valleys



CULTURE PILLAR

Real Mountain Culture

ADVENTURE PILLAR

Steeped in Adventure





BIRTHPLACE OF ADVENTURE



BIRTHPLACE OF ADVENTURE

POSITIONING STATEMENT

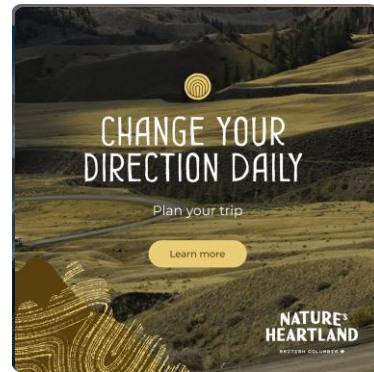
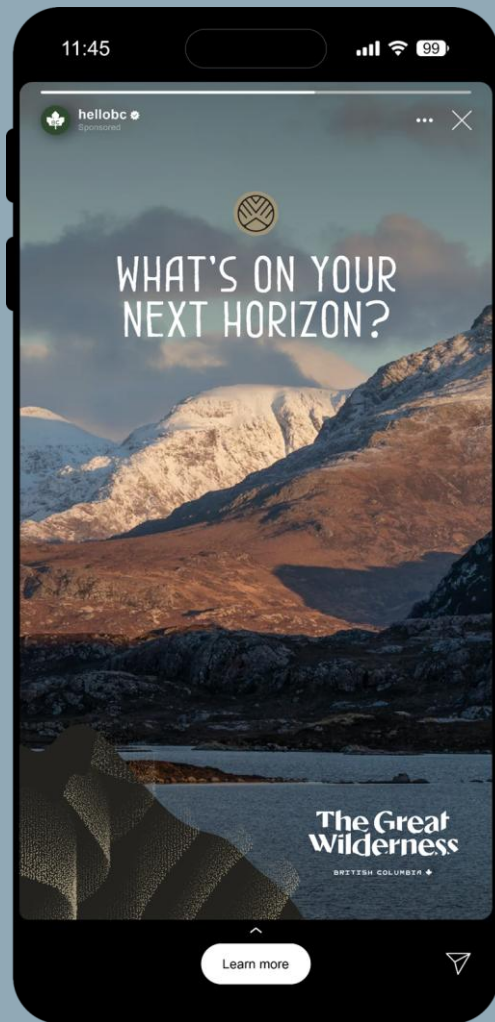
A land of endless peaks,
shaping generations
of adventurers

BRAND PILLARS

ENDLESS PEAKS & VALLEYS

STEEPED IN ADVENTURE

REAL MOUNTAIN CULTURE





2

Activate the
brands in
your work



Come visit us.

Kamloops lies at the junction of British Columbia's major highways and is accessible via ground, air or rail.



Drive

Vancouver	3.5 hours	354 km
Whistler	4 hours	300 km
Jasper	5 hours	443 km
Banff	5.5 hours	495 km
Calgary	7 hours	619 km
Edmonton	8.5 hours	809 km

Times are approximate.
Check drivebc.ca for updated road conditions and closures.

Fly

WestJet	westjet.com
Air Canada	aircanada.com
Pacific Coastal	pacificcoastal.com

Bus

Elbus	myelbus.ca
Rider Express	riderepress.ca

Train

VIA Rail Canada	viarail.ca
Rocky Mountaineer	rockymountaineer.com

RAINFOREST TO ROCKIES
BRITISH COLUMBIA, CANADA

Discover Kamloops on the Rainforest to Rockies journey, acting as a central hub for multiple exploration routes.

Embark on a captivating Rainforest to Rockies road trip that takes you from the Pacific Ocean to the Canadian Rockies. Travel along the Trans-Canada Highway through big cities and canyon towns, alongside lakes and forests, and witness British Columbia's highlights and highest peaks.

Discover the routes.



tourismkamloops.com 43

Add the Iconic logo to your website or brochures

Mention the brand in your social media

Display a decal at your business

Leverage the brand in collateral

Create & share Iconics content

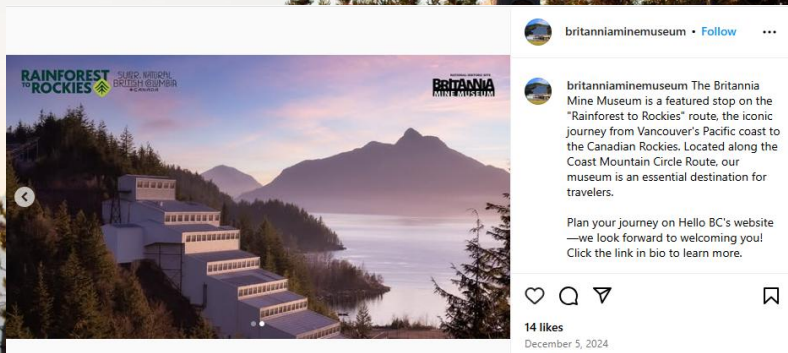
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14 MIN READ • 2 MONTHS AGO

THE ULTIMATE BC GOLF ROAD TRIP: GOLF FROM RAINFOREST TO ROCKIES

Travelling from oceanfront opportunity to explore British



Nicklaus North Golf Course | Tourism Whistler/Chad Chomick

Whistler

Heading north along Highway 99, the [Sea-to-Sky Highway](#), enjoy one of North America's most visually-stunning drives, following the shores of Howe Sound. Passing by beautiful Squamish, we encourage eager golfers to stop off at [Squamish Valley](#) for a round or in town for a cold brew before arriving at one of the world's most enchanting golf destinations, [Whistler](#). Three incredible, world-class golf courses are set within the village, so take your pick or play them all. After a few days spent touring golf courses, restaurants, and activities, you can head north to another marquee golf course in Pemberton, [Big Sky Golf Club](#).

Outside of golf, you'll find [memorable activities](#) including the PEAK 2 PEAK Gondola, zipline tours, treetop adventures, and the wonder of Vallee Lumina - an immersive light show set in the forested surrounds of Cougar Mountain.

Add the Iconic logo
to your website or brochures

Mention the brand in
your social media

Display a decal at your
business

Leverage the brand in
collateral

Create & share Iconics
content



SUPER, NATURAL BRITISH COLUMBIA CANADA

RAINFOREST
TO ROCKIES

The Great
Wilderness

THE
INFINITE
COAST

NATURE'S
HEARTLAND

*Valleys &
Vineyards*

BIRTHPLACE
ADVENTURE

DestinationBC.ca/IconicsLaunch

The Value of Tourism

The Railrider Mountain Coaster, Kootenay Rockies Tourism/Mitch Winton/Golden Skybridge

2023 GDP by Primary Resource Sector*



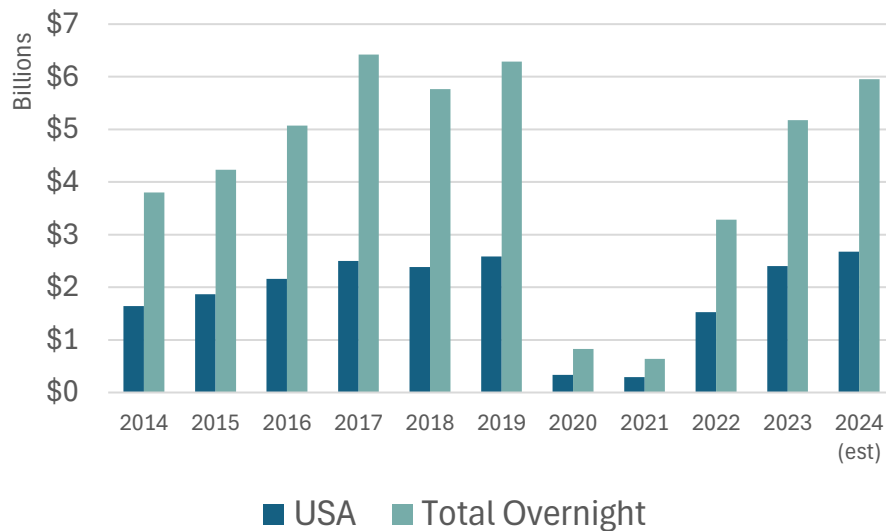
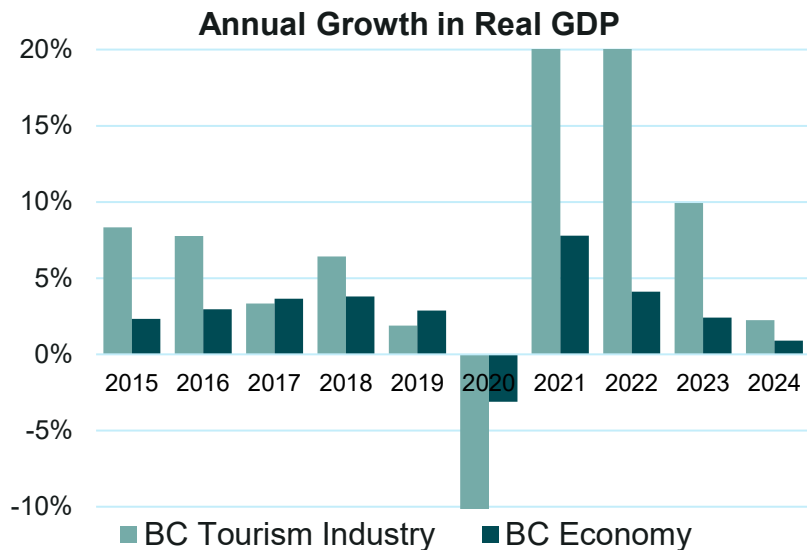
GDP by Primary Resource Industry calculated from NAICS codes: Forestry and Logging (113), Agriculture and Fish (111 & 114), Oil and Gas Extraction (211), and Mining and Quarrying (except oil and gas) (212).

(*2017 constant dollars)

Tourism is a Driver of Growth for the BC Economy

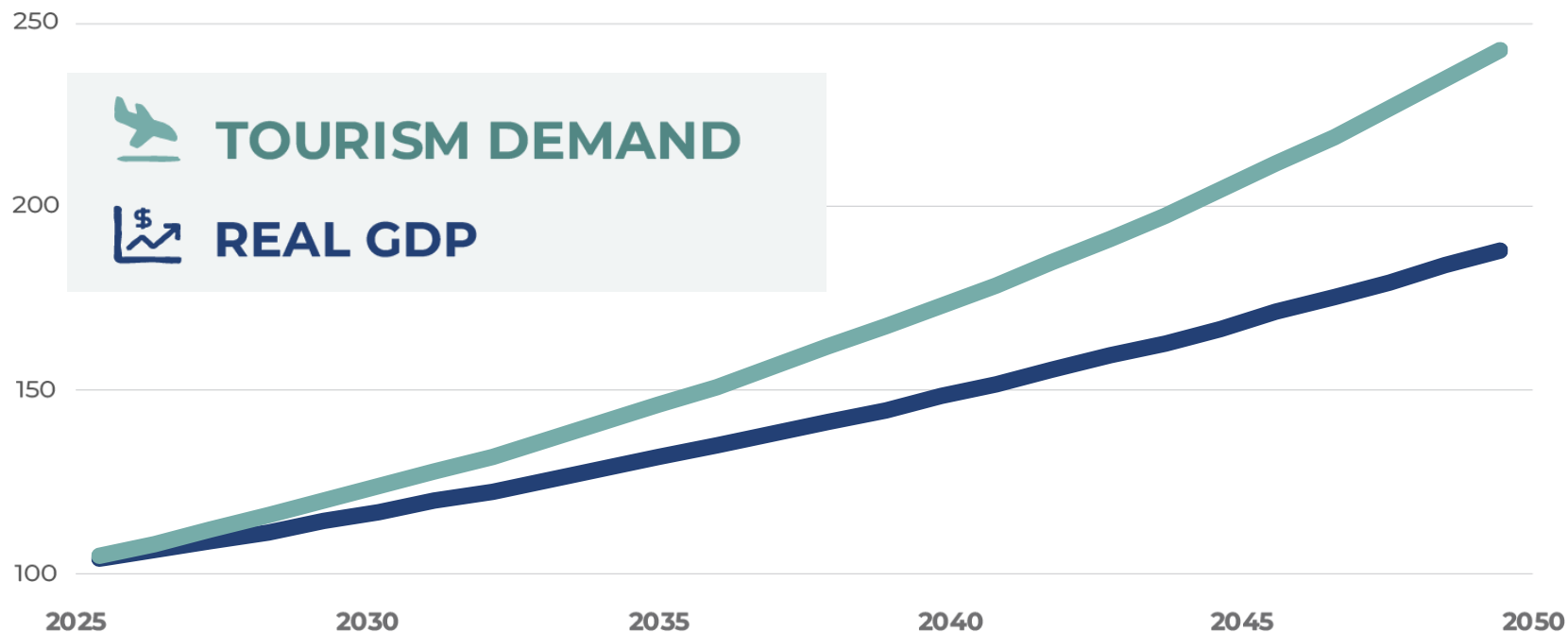
Over the last 10 years, for most years, tourism's annual growth in GDP has exceeded that of the BC economy.

Tourism generated \$6 billion in export revenue in 2024 (up \$800M over 2022).



Long Term International Tourism Growth Projections

GLOBAL OUTLOOK 2025-2050





Resident Perceptions of Tourism Snapshot Series 2024-25

KEY QUESTIONS

“

I value the contribution visitors make to my local economy.

British Columbia
80.0%



“

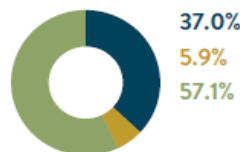
Overall, tourism contributes positively to the quality of life in my community.

British Columbia
70.5%

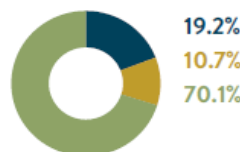


“

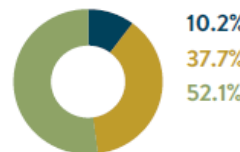
Do you think your community has too few, too many, or the right amount of tourism throughout the year?



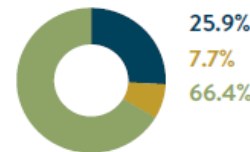
WINTER
DEC-FEB



SPRING
MAR-MAY



SUMMER
JUN-AUG



FALL
SEP-NOV

■ Too Few

■ Too Many

■ Just Right

PROVINCE-WIDE RESULTS



DESTINATION
BRITISH COLUMBIA®

IMPACT ASSESSMENT

ECONOMIC IMPACTS include government investment in tourism infrastructure, contributions made by visitors to local economies, and the weighing of positive and negative impacts of tourism.

ENVIRONMENTAL IMPACTS include the degree to which the tourism industry reduces local carbon emissions, reduces waste, and contributes to the protection of natural areas.

SOCIAL/CULTURAL IMPACTS include the diversity of amenities, development of local business, and diversity of people supported by tourism.

JOB/CAREER IMPACTS include career growth and wage perceptions from jobs and careers in the tourism industry.

INDIGENOUS IMPACTS include awareness of Indigenous tourism experiences and businesses in BC.

OVERALL

More Positive 5

British Columbia
3.53

More Negative 1



ENVIRONMENTAL

More Positive 5

British Columbia
3.03

More Negative 1



JOB/CAREER

More Positive 5

British Columbia
3.01

More Negative 1



ECONOMIC

More Positive 5

British Columbia
3.93

More Negative 1



SOCIAL/CULTURAL

More Positive 5

British Columbia
4.00

More Negative 1



INDIGENOUS

More Positive 5

British Columbia
3.67

More Negative 1



Tourism Employment

- Over 125,000 employees across British Columbia (+8% over 2022)
- Mix of jobs:
 - Entry level jobs that give youth and new immigrants labour market skills and pay for post-secondary education (particularly for youth from economically disadvantaged families)
 - Well paying career jobs – Business managers and owners, finance executives, marketing and technology employees, executive chefs, pilots, biologists, First Nations Elders, cultural interpreters, artists, etc.
- Creates jobs on First Nations lands providing economic sovereignty for First Nations peoples.
- Engenders entrepreneurship – 50%+ of tourism businesses are owner-operated



Community Economic Diversification

- Tourism creates more economically diversified rural communities in BC
- Economically diversified communities are more resilient and more likely to survive downturns than one industry towns
 - Revelstoke (rail hub), Ucluelet (forestry & fishing), etc.
- Attractive to professionals – “a good place to visit is a good place to live”
 - Rossland, Golden and other towns with strong tourism sectors have fewer problems attracting doctors, nurses, and other professionals



Our Competitors Are Investing Heavily in Tourism

Other wealthy, natural resource-based, jurisdictions are investing in tourism to diversify their economies (Alberta, Norway, Saudi Arabia, Dubai, etc.) as are tech and film dependent jurisdictions (California, Ireland, etc.)

Annual Budgets – Key Sub-National Competitors (\$C)	
Organization	Budget
Tourism & Events Queensland	\$129 M (appropriation) \$5.3 M (grant for partnerships & aviation marketing)
Visit California	\$262 M (formula funding)
Travel Alberta	\$80 M (appropriation)*
Destination BC	\$56 M (appropriation)



*Supported by recent and coming legislation to facilitate resort development and city & community marketing.

The Tourism Opportunity

Globally, tourism is recognized as a “sunrise industry”—one of the fastest-growing sectors globally, outpacing other industries.

- British Columbia and Canada have a unique opportunity to increase its share of international visitors, particularly as geopolitical shifts make the US a less attractive destination for travelers.
- However, BC has not fully capitalized on its competitive advantages—its natural beauty, Indigenous culture, and diverse tourism offerings—to capture a larger share of the global travel market.
- Strategic investment in destination marketing and experience development is critical to unlocking this potential.

Destination BC Resources



Digital Marketing

Scale your marketing efforts, strengthen your online presence, and deliver compelling content that speaks to your current fans and connects with prospective visitors.

[LEARN MORE →](#)

Experience Development

Create unforgettable experiences, programs, and services for your visitors.

[LEARN MORE →](#)

Social Media Marketing

Build your reputation and amplify your word-of-mouth marketing campaigns on social media.

[LEARN MORE →](#)

Travel Trade & Travel Media

Work with travel trade and travel media to increase awareness of your tourism experiences with BC's top international markets.

[LEARN MORE →](#)

Applying Insights

Use research and analytics to gain insights into your visitors, to create relevance in your marketing and experience activities, and to measure.

[LEARN MORE →](#)

Safety & Emergency Preparedness

Plan, prepare, and respond to unexpected emergencies as they arise.

[LEARN MORE →](#)

Accessible Tourism

Ensure your business is accessible and inclusive for all employees and travellers.

[LEARN MORE →](#)

BC's Destination Brand Resources

Browse the Super, Natural British Columbia® brand family tools and resources.

[LEARN MORE →](#)

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REGISTER TO DISCOVER BC'S NEW ICONIC DESTINATION BRANDS

On June 4, 2025, at 9am PDT, Destination BC will host a webinar to introduce the new iconic destination brands for British Columbia.

Welcoming the American & Canadian Visitor This Season

SECTION 1

Resident Research

Market monitoring and reports on external impacts on and resident perceptions of British Columbia's tourism sector.

Industry Performance

Various performance indicators for Canada, BC and British Columbia's six tourism regions.

Regional Research

Publications and reports on the tourism sector in British Columbia's six tourism regions.

Market Research

Publications and reports on the tourism sector in British Columbia's six tourism regions.

[WHO WE ARE](#)[WHAT WE DO](#)[STRATEGIC APPROACH](#)[LEARNING CENTRE](#)[RESEARCH](#)

TACKLING TARIFFS

Canada Day Celebrations

[Home](#) | [Tackling Tariffs](#)

Tackling Tariffs: Strengthening Global Connections through Tourism

Regional Research

Publications and reports on the tourism sector in British Columbia's six tourism regions.

Market Research

Publications and reports on the tourism sector in British Columbia's six tourism regions.

Make the Trip Home

Destination British Columbia
BC Tourism Partner Social Toolkit
April 2025

BRITISH COLUMBIA TOURISM FUND

Your one-stop hub for all things tourism related to FIFA World Cup 2026 in British Columbia! This is where you'll find updates, tools, and opportunities to get involved in one of the world's biggest events. From collaborative initiatives to practical resources, we're here to help you make the most of this incredible opportunity for BC's tourism sector, communities, and economy.

In February 2024, we formed the British Columbia Tourism Football Club (BCTourismFC), a Tourism Consortium uniting Destination BC, Destination Vancouver, Indigenous Tourism BC, the Ministry of Tourism, Arts, Culture & Sport, the BC Destination Management Organization Association (BCDMOA), and the City of Vancouver. Together, we're working to ensure FIFA World Cup 2026™ delivers



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