













TOURISM IN BC

Supporting our Vibrant Visitor Economy

BIA® Spring 20

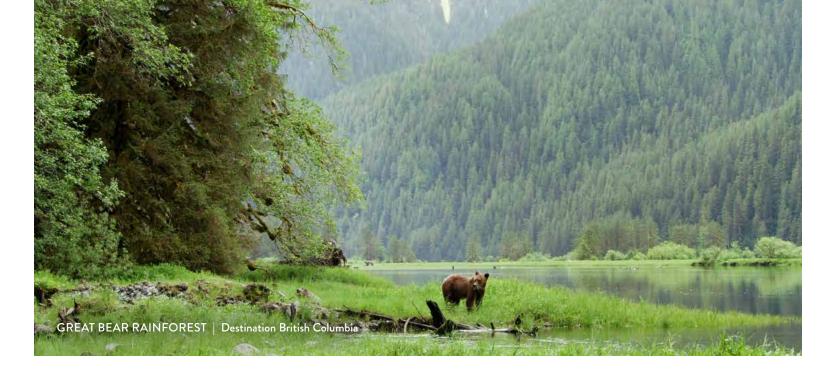
Destination British Columbia acknowledges with gratitude the x^wməθk^wəý əm (Musqueam Indian Band), S<u>k</u>w<u>x</u> wu7mesh Úxwumixw (Squamish Nation), and səlilwətal (Tseleil-Waututh Nation) on whose shared territories we operate our main office.

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 published prior to 2024 was subsequently updated by BC Stats, due to revised 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 2023, the tourism sector in BC generated \$ 22.1 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>.

WELCOMING THE WORLD: BC'S GLOBAL TOURISM CONNECTIONS

BC is a place where people come together to experience the power of nature, the warmth of communities, and the different perspectives of different cultures.

Travel has the power to connect, inspire, and uplift, and we remain committed to building a better world, together, through tourism, while ensuring that BC is a place where everyone feels welcome and included.

Each year, we have the privilege of opening our doors to visitors from across the country and around the globe. Destination BC invests in marketing across key international markets, including the United States, the United Kingdom, Germany, Australia, Mexico, and China, while also strengthening domestic efforts in BC, Alberta, and Ontario, ensuring BC remains a must-visit destination while staying adaptable to evolving market conditions and visitor trends.

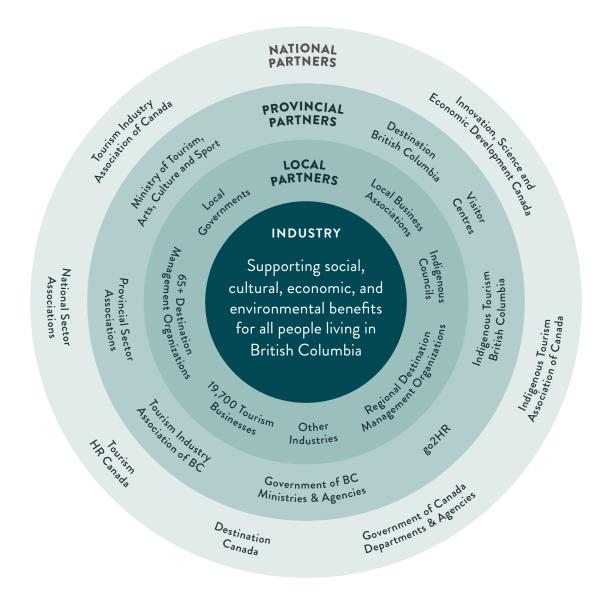
RICHMOND | Destination BC/@vancitywild





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

A strong tourism industry is a key pillar of the <u>StrongerBC Economic Plan</u>. <u>BC's</u> <u>Ministry of Tourism, Arts, Culture and Sport</u> leads the coordination of provincial tourism priorities, sets the strategic direction for tourism, and works closely with Destination BC and industry partners to create opportunities for growth while ensuring tourism benefits the economy and communities across BC.

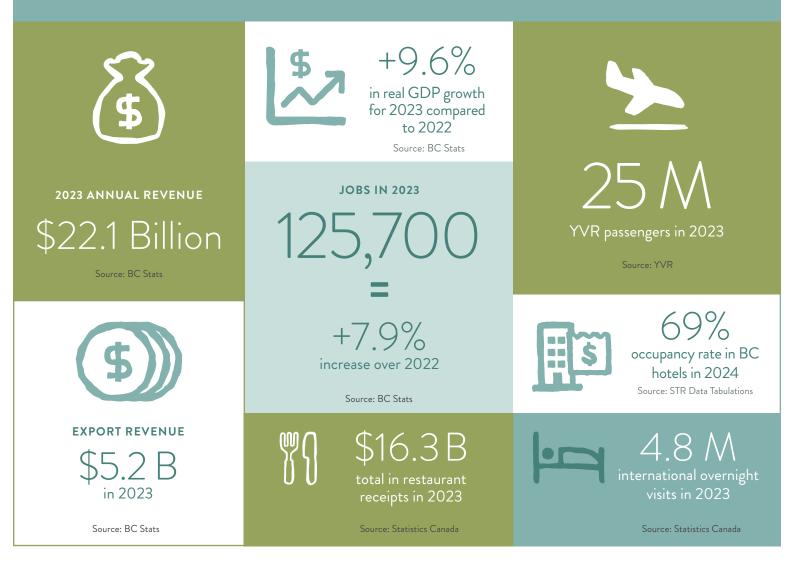
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TOURISM ECONOMIC IMPACT AT A GLANCE



BC GDP

Tourism is one of BC's leading economic resource sectors and has significantly contributed to the province's GDP in recent years.



2023 GDP BY PRIMARY RESOURCE INDUSTRY



Source: BC Stats



MARBOUR AIR

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ECONOMIC SPINOFFS

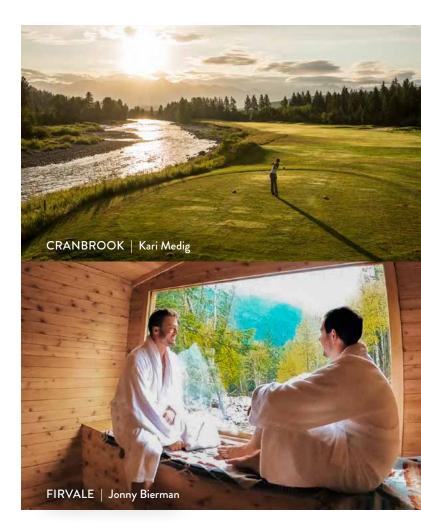
In BC, tourism's spinoff benefits exceed that of many industries. Most tourism businesses directly support the provincial economy by buying goods and services locally, hiring staff locally, and retaining profits locally. Tourism also generates benefits that other industries can leverage, including development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

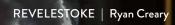
VALUE OF TOURISM FOR RESIDENTS

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. BC's tourism industry will create thousands of new job opportunities in the coming years, enabling 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 BC's world-class mountains.

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 <u>Indigenous Tourism BC</u> 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.



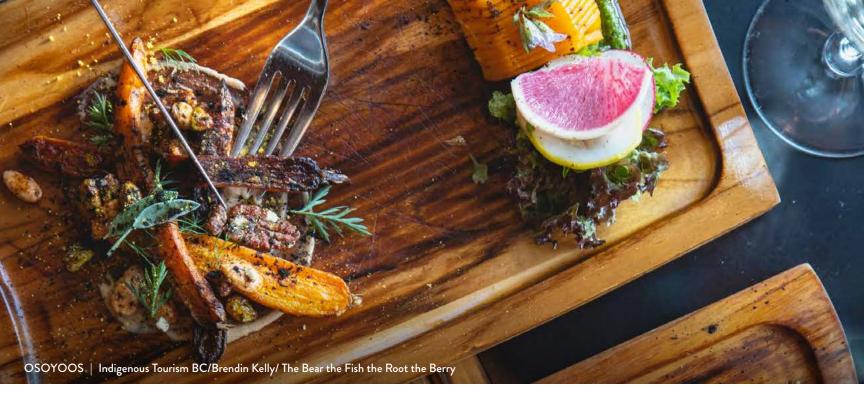


BRITISH COLUMBIA BELIEVES IN TOURISM

RESIDENT PERCEPTIONS OF BRITISH COLUMBIA'S TOURISM INDUSTRY







BC TOURISM OPERATING ENVIRONMENT

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 behaviours continue to evolve, with strong demand keeping travel a budget priority.

MRDT: With Municipal and Regional District Tax revenues, eligible communities receive funding for local tourism marketing, projects, and programs that help drive growth in visitation, revenue, and jobs, while strengthening local economies, and enriching community well-being.

Accelerated Digitization: The evolution of marketing requires a continued focus on accelerated digitization, data-driven decision-making, and emerging technologies like Al.



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 want to play an active role in shaping the future of tourism where they live.

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 taxpayer-funded organization that exists to improve the lives of all people living in British Columbia through the tourism industry.

HOW DESTINATION BC SUPPORTS TOURISM







MARKETING BRITISH COLUMBIA



MARKETING PROGRAMS

The traveller journey is dynamic and nonlinear, involving multiple touchpoints from inspiration to booking and in-destination travel. Destination BC's role is to captivate core travellers by creating an emotional connection to Super, Natural British Columbia®, building brand awareness for new routes and place brands, and inspiring future visits through compelling storytelling.

Our integrated marketing programs engage global audiences through data-driven campaigns, content, social media, travel trade, and travel media. We activate interest with engaging tripplanning content, generate bookings by connecting travellers with BC's tourism businesses, and elevate BC as a destination of choice through user-generated content and media coverage.

Destination BC's key markets include the United States (California), the United Kingdom, Germany, Australia, Mexico, and China, with a domestic focus on BC, Alberta, and Ontario. By integrating consumer content and marketing, travel trade, and travel media, we strengthen BC's global presence and drive longterm success for the province's visitor economy.



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

CO-OPERATIVE MARKETING PARTNERSHIPS PROGRAM

Destination BC's <u>Co-operative</u> <u>Marketing Partnerships Program</u>

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.

MERVILLE | Alistair Byrne

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 63 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

TERRACE | 6ix Sigma Productions

The Municipal and Regional District

Tax (MRDT) was introduced in 1987, by the Government of BC. The purpose of the MRDT is to provide funding to designated recipients for tourism marketing, projects, programs, and affordable housing initiatives. 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

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.



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COWICHAN BAY | BC Bird Trail/The Number Creative

Learning Centre available at DestinationBC.ca/learning-centre

AN INCLUSIVE AND ACCESSIBLE TOURISM INDUSTRY

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

PRINCE RUPERT | Marty Clemens

- 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

ROGERS PASS | Kari Medig

Destination development is the strategic planning and advancement of defined areas to support the sustainable evolution of desirable destinations for travellers, with a 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 <u>destination development strategies</u> have been created, along with regionally specific strategies. Provincially, the <u>Invest in Iconics Strategy</u> is a longterm 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 longterm growth of tourism experiences and revenues within the province.

AN INNOVATIVE ROLE IN VISITOR SERVICES

PORT ALBERNI | Alberni Valley Tourism / Pete O'Hara

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



As a key source of relevant and timely travel information, destinations must keep pace with the convenience, speed, and channel availability expected by visitors, while providing personalized and meaningful support swiftly and seamlessly. Visitor services are essential in local communities, offering benefits through partnerships with local entities to support tourism.

There are over 130 community-owned Visitor Centres throughout British Columbia that make up Destination BC's Visitor Services Network Program. In 2024, the community Visitor Centres served over 2 million visitors face-to-face at their physical locations, around their community, and through email, over social media, and by phone.



INDIGENOUS TOURISM

First Nations communities are 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 First Nations communities, and Indigenous 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 First Nations 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 First Nations communities and engage actively with those interested in tourism.



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 in market 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 supporting all-season growth in high-potential communities and rural destinations where capacity exists.

BC TOURISM CLIMATE RESILIENCY INITIATIVE

<u>The BC Tourism Climate</u> <u>Resiliency Initiative (BCTCRI)</u> is a provincial pilot project dedicated to building foundational supports for 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 longterm 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.

PENTICTON | Nathan Penner

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.

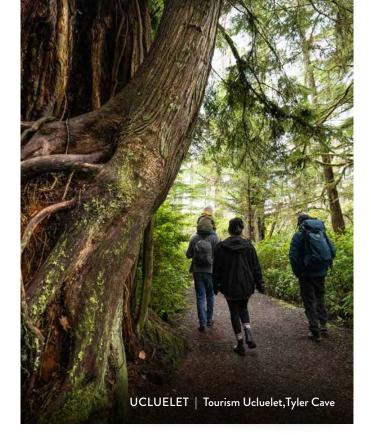
PROJECT 3: SUSTAINABILITY AND CLIMATE ADAPTATION DATA FRAMEWORK

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

Follow us on <u>LinkedIn</u> and subscribe to our newsletter for timely updates on tourism facts and research, partnerships, marketing campaigns and more, (<u>DestinationBC.ca/Subscribe</u>).



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Share your achievements and industry success stories with us via media.relations@destinationbc.ca.

Review Destination BC's resources and programs online for additional information (<u>DestinationBC.ca</u>).



Share our Learning Centre resources with the tourism businesses and partners in your community, at <u>DestinationBC.ca/learning-centre</u>.

#EXPLOREBC



Follow us on <u>Instagram</u>, <u>Facebook</u>, and <u>TikTok</u> (@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.

TALES CLASSE





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