

An aerial photograph of Vancouver, British Columbia, showing the city skyline, the waterfront, and the mountains in the background. The image is overlaid with a semi-transparent dark blue rectangle containing white text.

EOS 2023

Destination BC Presentation

February-March, 2023



BC's Visitor Economy in 2019



\$20.2 Billion
Annual Revenue



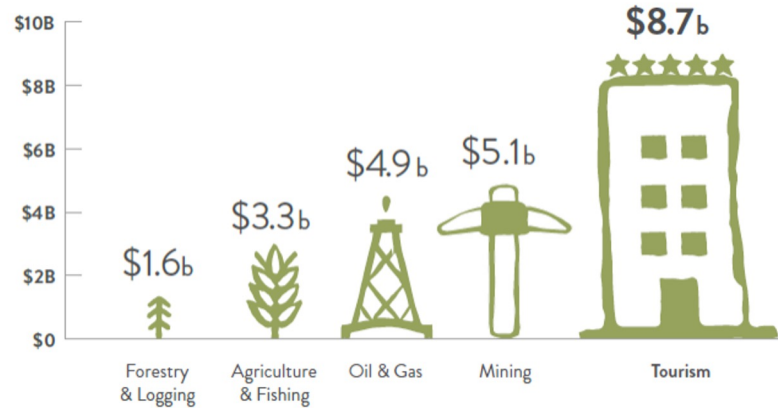
\$8.7 Billion
GDP



149,000 people
employed due to
tourism



19,748 tourism
businesses



BC Resident Perceptions of Tourism



 PARKS  TRADE & INVESTMENTS  AIRLINE ROUTES

WINE SECTOR DEVELOPMENT  IMMIGRATION

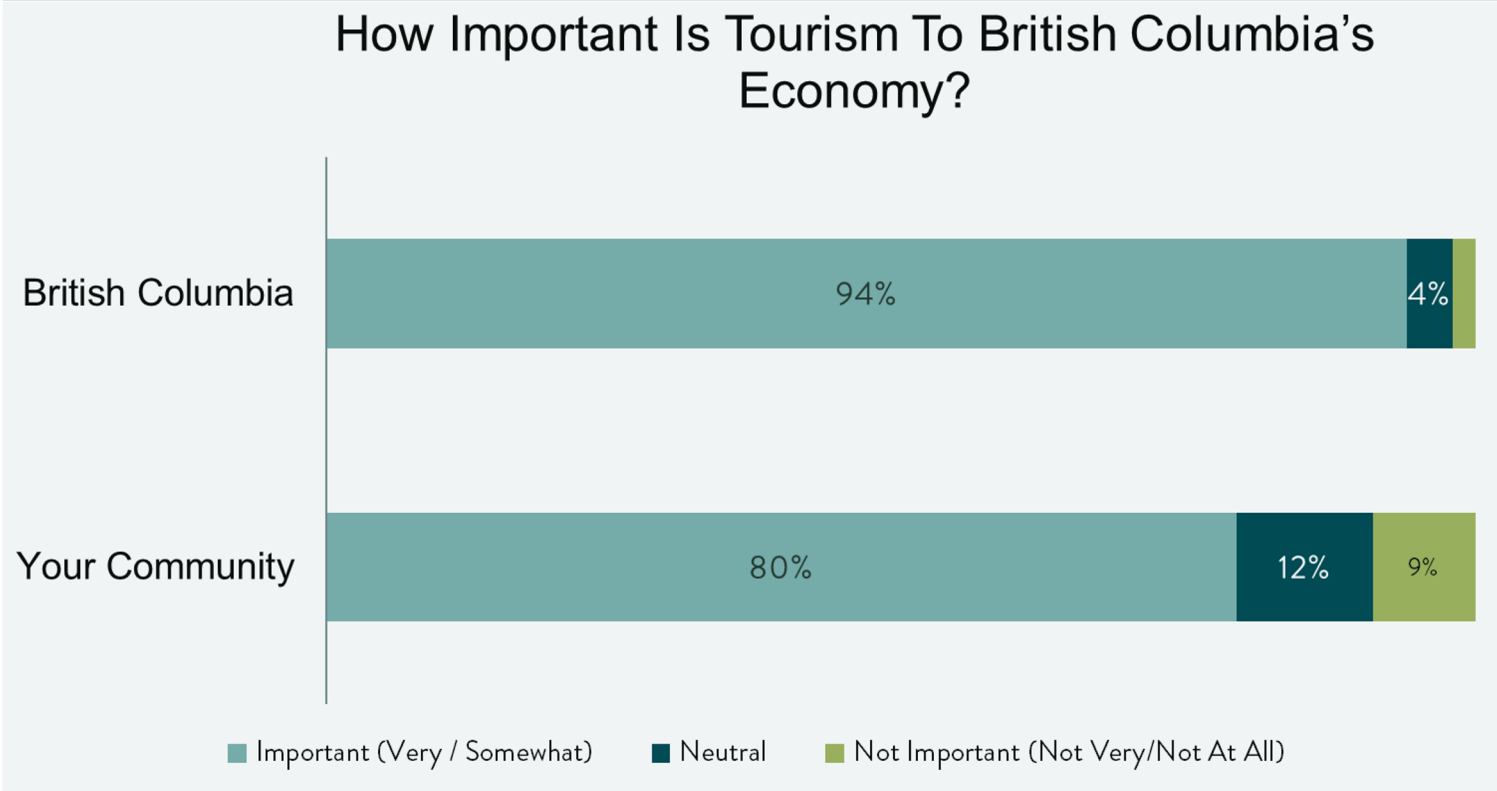
SPORTS EVENTS **JOBS** INTERNATIONAL EDUCATION  HIGHWAYS

 COASTAL TRANSPORTATION  SKI RESORTS

MUSEUMS  TRANSIT

ACCOMMODATIONS CULINARY  FACILITIES

Perceptions of the Importance of Tourism



Perceptions of Social/Cultural Impacts

Tourism plays a positive role in preserving, sharing, and celebrating the culture and heritage of my community



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

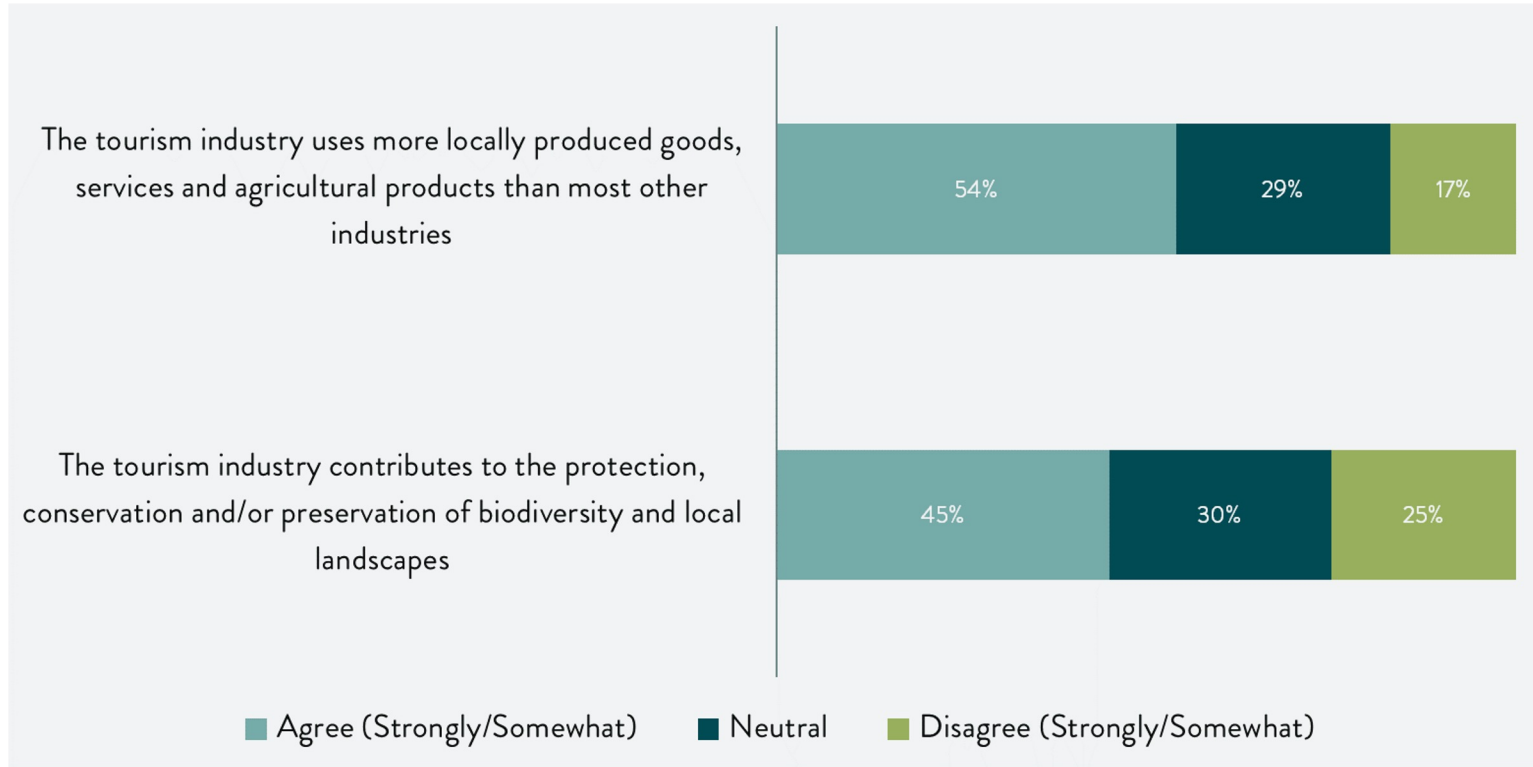


Tourism supports a greater diversity of amenities (such as restaurants, attractions, recreation facilities and events) than would...

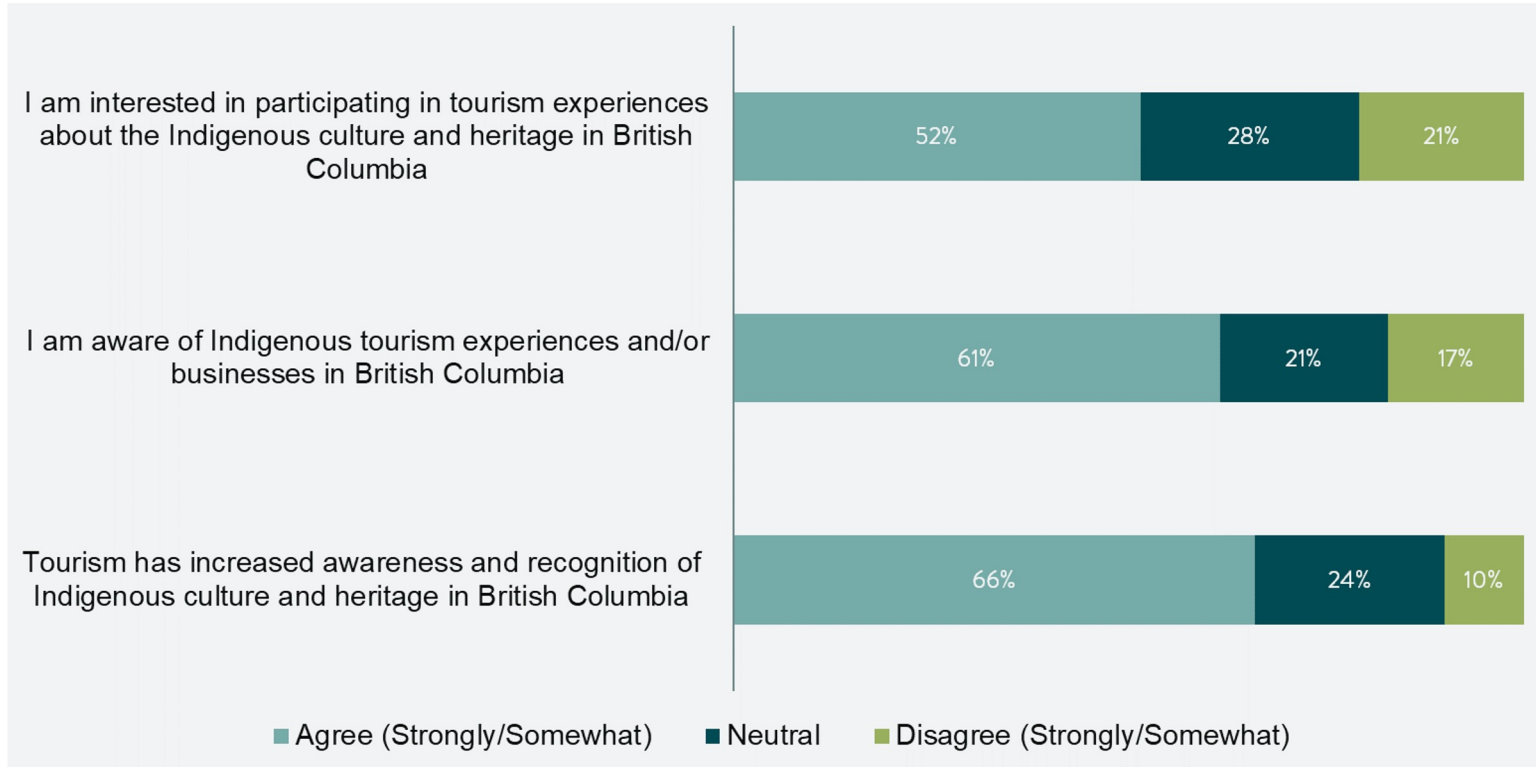


■ Agree (Strongly/Somewhat) ■ Neutral ■ Disagree (Strongly/Somewhat)

Perceptions of Environmental Impacts



BC Residents' Interest in Indigenous Experiences



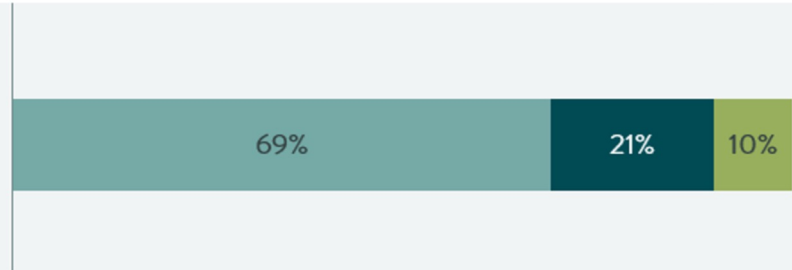
BC Residents' Support for Tourism

How Much Tourism Do You Want In Next 5 Years
Compared To Pre-COVID-19 Pandemic



■ More ■ About the Same ■ Less ■ Don't Know/Not Sure




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



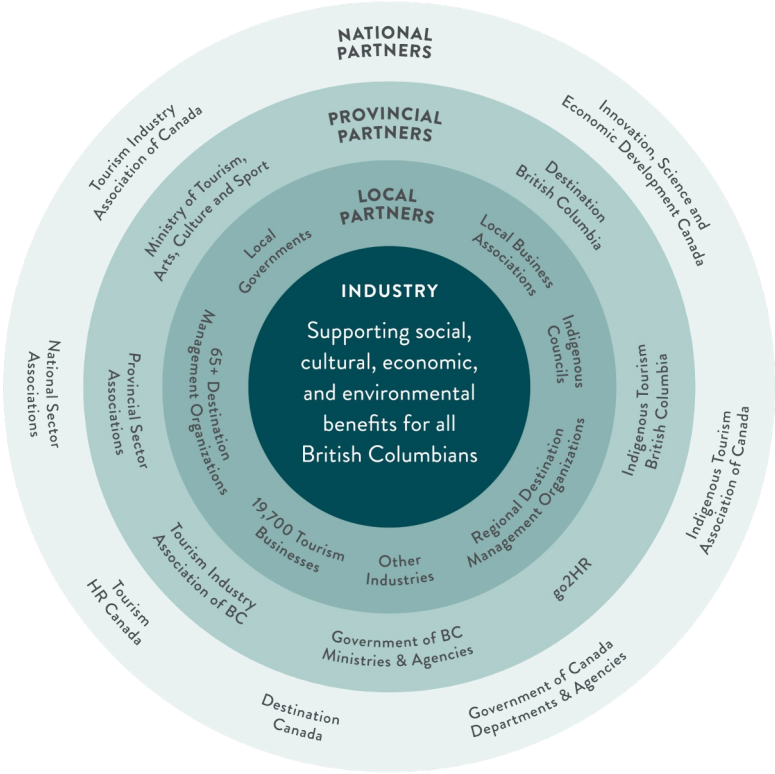
■ Agree (Strongly/Somewhat) ■ Neutral ■ Disagree (Strongly/Somewhat)



Industry Performance & Outlook 2019 – 2023 (% change from 2019)

| | 2019 | 2022 est. | 2023 est. |
|--|---------|----------------|----------------|
|  Tourism Industry Revenue | \$20.2B | \$18.8B -7% | \$20.7B +2% |
|  Overnight visitor expenditures in BC | \$7.9B | \$9.5B +20% | \$9.8B +24% |
|  Overnight visitor expenditures in BC | \$2.6B | \$1.4B -48% | \$2.3B -12% |

BC's Tourism Industry Ecosystem





DESTINATION
BRITISH COLUMBIA®

Global Marketing Destination Management

A scenic view of a snow-covered mountain range. In the foreground, a dense forest of evergreen trees is covered in snow. A cable car is visible on a line stretching across the middle ground, heading towards the right. The background features majestic, snow-capped mountains under a cloudy sky.

Destination Management

- Focus on regenerative, purposeful tourism
- Attract visitors who tread lightly and contribute more than they take
- Research-based planning
- Seasonal dispersion
- Messaging about responsible, inclusive and accessible travel

What We Heard: Grouping of Key Themes

GROUP 1: Destination Marketing & Enhancement



MARKET
MIX



ELEVATED
DD + ED



RESPONSIBLE +
RESPECTFUL VISITORS

GROUP 2: Indigenous Tourism



INDIGENOUS
TOURISM/RECONCILIATION

GROUP 3: Tourism Measurement Related



DATA TO MANAGE
TOURISM



RETHINKING
SUCCESS



VALUE OF
TOURISM

GROUP 4: Training & Communications



DEVELOPMENT +
TRAINING



EMERGENCY
MNG'T



GROUP 5: Government Policy



ACTION ON
CLIMATE CHANGE



GOV'T +
ECO-SYSTEM



BALANCE DMO
INVESTMENTS



RURAL ECONOMIC
DEVELOPMENT

GROUP 6: Workforce



WORKFORCE
REALITIES

Priorities for Reshaping Tourism in BC

- Closer integration of Destination Marketing and Destination Management
- Stronger collaboration and partnerships
- Apply lenses of Reconciliation, inclusion, and sustainability







Investment in Destination Development

ALBERTA

Vancouver

VANCOUVER, COAST & MOUNTAINS

WASHINGTON

\$240M invested
in the Vancouver,
Coast & Mountains
tourism region



Lower Mainland Community Investments





Where can you play a role?

- Keep visitors in mind during community planning
- Improve accessibility
- Develop relationships with local Community & Regional Destination Management Organizations & open pathways to partnerships
- Consider tourism when investing in public infrastructure
- Support your visitor centre
- For some communities - facilitate staff housing



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ABBOTSFORD | BC, Ale Trail

THANK YOU



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