



2025 Visitor Economy Impact Report

Prepared May 2026



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CONTEXT AND LIMITATIONS



SOUTHERN
GULF
ISLANDS

CONTEXT AND LIMITATIONS

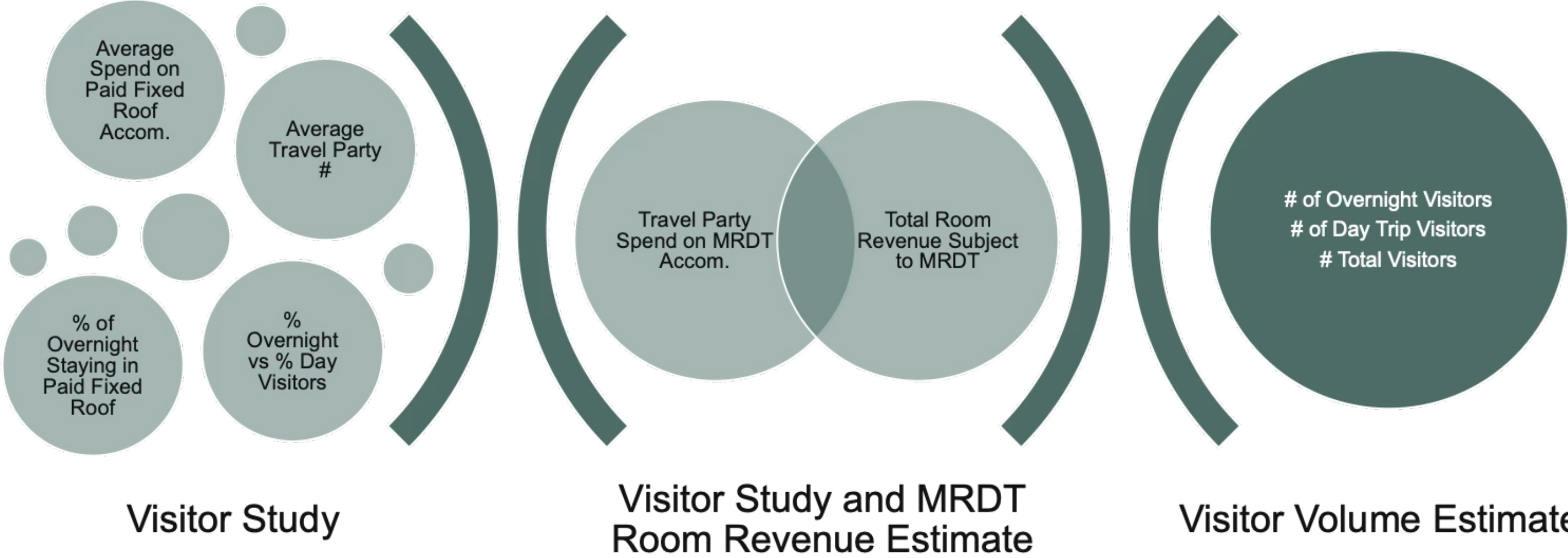
The Southern Gulf Islands Tourism Partnership (SGITP) retained ACG Insights to provide a summary of 2025 tourism metrics. Previously, ACG had developed a model to estimate visitor volume using a combination of AirDNA data, a BC Ferries 2019 Summer Visitor Study and informed estimates based on industry knowledge. However, SGITP is phasing out the AirDNA data subscription and adding a year-round Visitor Study which launched in 2025. With this new data, it was decided to develop a new Visitor Volume model using publicly available, and consistently reported, Room Revenue subject to MRDT taxation. Using this Room Revenue data available from the BC Government, we then use components of our Visitor Study (i.e. Average Travel Party Spend on Accommodation, Overnight Visitor Accommodation Type, Average Travel Party Size) to impute the Visitor Volume.

The limitations of this model lay with the data sources. The MRDT Room Revenue data, although a very solid data source as it is consistently gathered and reported by a reliable third-party, does have some anomalies when breaking the data down by month. This can be due to auditing and or delayed reporting from operators, among others. The Visitor Study data is a self-selection method so there are inherent biases. In addition, the mean in which we solicit participation may or may not introduce additional biases. For example, whether we are reaching and compelling all visitor types (i.e. Day and Overnight) to complete the survey. We do not know the non-responder profile compared to the responder profile therefore the results may or may not be reflective of the visitor population as a whole.

MODEL OVERVIEW

SOUTHERN
GULF
ISLANDS

MODEL OVERVIEW



KEY METRICS

SOUTHERN
GULF
ISLANDS

KEY METRICS



Average spend on paid
fixed roof accommodation

\$820.13



Average paid fixed roof
travel party size

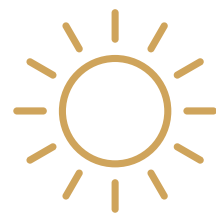
3.18

The results of the model are highlighted on the next page. In future years, we will employ the same approach which will make year-over-year comparisons possible. In addition, we will have expanded Visitor Study data to incorporate into future Impact Reports.



% of overnight staying in
paid fixed roof (MRDT-
collecting)

66.3%



% of day visitors

16.5%



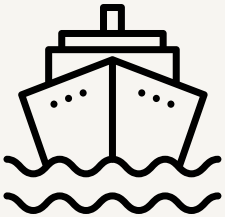
2025 total room revenue
subject to MRDT

\$34, 102, 452

RESULTS

SOUTHERN GULF
ISLANDS

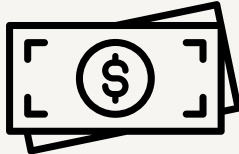
RESULTS



**BC Ferries Pax.
2025 Arrivals¹**

1,178,438

↑ 3.5%.

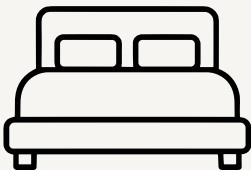
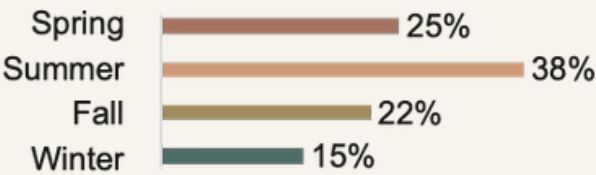


**2025 Room Revenue
Subject to MRDT²**

\$34,106,452

↑ 15.6%.

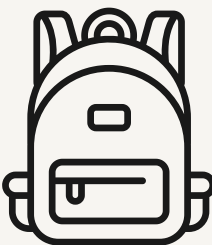
**2025 Room Revenue Subject to
MRDT by Season²⁴**



**2025 Est. OVERNIGHT Visitor
Volume³**

199,666

+



**2025 Est. DAY TRIP
Visitor Volume³**

39,455

=



**2025 Est. TOTAL
Visitor Volume³**

239,121

RESULTS Cont'd

¹ Obtained from BC Ferries. Sum of departure passengers at Swartz Bay Terminal for Route 4 and 5, Crofton Terminal for Route 6, and Tsawwassen Terminal for Route 9.

² Source: BC Stats and Ministry of Finance; April 9, 2026. Annual Room Revenues by Municipal Jurisdictions Subject to MRDT for 'Southern Gulf Islands'.

³ SGITP Visitor Study serves as core metrics used to estimate Visitor Volume. Because of the approach initially used for the Visitor Study, it was determined that the data beginning in October 2025 would be included but due to small sample, we used data through the Spring of 2026 for the 2025 calculations. Breakdown of Day vs. Overnight Visitors was estimated to be 16.5% despite the Visitor Study having Day Visitors at only 10%. Previous research (2019 Visitor Study) had estimated Day visitors to be 15% of Visitor Volume and using data from August and September 2025 Visitor Study, the average was 19% Day Visitor. Given this, we selected 16.5% as an informed estimated.

⁴ Spring = March, April, May; Summer = June, July, August; Fall = September, October, November; Winter = December, January, February.