



COVID-19 TOURISM REGIONAL IMPACT REPORT

An analysis of British Columbia
outside the Lower Mainland and Whistler
June 1, 2020

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We summarize the data from 8 weeks of surveys of 2315 distinct tourism businesses, nearly all of which are located outside of the Vancouver/Whistler market where 40% of BC tourism spending occurs.

Key results for consideration

- Firms report a drop in April revenue averaging 71% compared to the same month last year
- The share of businesses closed due to COVID has risen from 36% in late March to 50% in mid May
- One in five firms reports that they are likely to face bankruptcy
- Workers have been laid off, or not hired for seasonal work, at alarming rates, with an average of 5-17 workers laid off per firm depending on the region
- The government response has been well received, with an overall positive experience among the 51% of firms who have accessed government programs

Although the responses are voluntary and thus not representative, they are fairly comprehensive in the five tourism regions highlighted in this report. By analyzing the data collectively and comparing it to measures of the tourism economy from before COVID-19, with some assumptions, we can make rough estimates of the regional impact and trends:

- COVID-induced losses to businesses equal to around 15% of pre-COVID GDP
- ~45,000 layoffs and ~30,000 seasonal jobs not expected to be filled, compared to a pre-COVID workforce of 110,000

These estimates align with StatsCan and Destination Canada findings and estimates, indicating that the impact of COVID in BC's regions as measured by the BCRTS weekly surveys is capturing the impact of the COVID-19 emergency at a local level.

Policy recommendations derived from survey responses follow.

FIRMS-TO-GOVERNMENT GAP

Re-opening is challenging for most businesses in the tourism industry

Recommendation:
Invest in Regions to support rebuilding of social license to welcome visitors.

Recommendation:
All recovery marketing plans and campaigns must be in alignment with the rebuilding of social license to ensure a positive return for tourism.

Recommendation:
Provide clear communication on re-opening guidelines vs legal requirements.

Recommendation:
Identify future plans for response and business aid in the event of a second wave of COVID-19 cases.

Businesses are not only facing a liquidity crisis but also a solvency crisis

Recommendation:
Government programs should also focus on providing appropriate measures, beyond traditional financing to include loan forgiveness, grants or cash injections, to help businesses survive

Recommendation:
Seasonal businesses have lost annual revenue and will require financial support to prevent insolvency into next fiscal

Many businesses have been ineligible for government support programs

Recommendation:
New government programs and relief should focus on addressing the gaps and supporting business not eligible for existing programs, specifically providing funds to the tourism industry businesses.

Recommendation:
Invest in the BC Tourism Resiliency Program to support businesses to obtain information on updated applications, guidelines and eligibility criteria.

Restrictions to non-essential travel within BC has the highest impact on businesses

Recommendation:
When it is safe to do so, lifting restrictions on nonessential travel is critical for firm survival.

Recommendation:
Businesses require lead time to be ready to accept visitors, setting a definite date for Phase 3 would provide significant help..

Urban, rural, and remote areas face different levels of impact from COVID-19

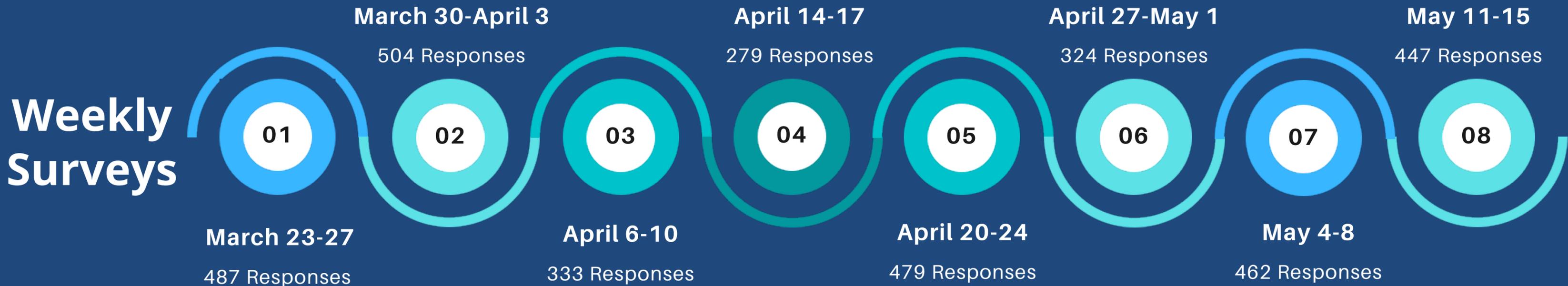
Recommendation:
Small businesses in rural and remote areas said they would like to receive training on how to use technology to future-proof their business.

ABOUT THE SURVEY

The British Columbia Regional Tourism Secretariat, British Columbia Hotel Association and the British Columbia Destination Marketing Organizations Association are working together to understand:

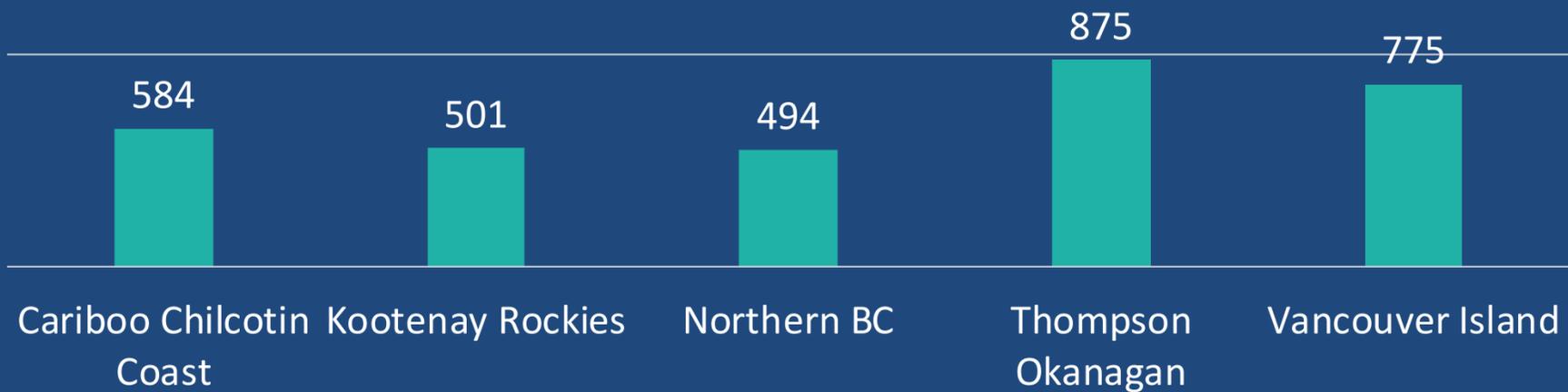
- the impact of COVID-19 on the tourism industry in British Columbia, with a focus outside the Lower Mainland and Whistler
- business perception of government responses
- businesses expectations for recovery

All findings in this report are based on member weekly surveys collected by the Secretariat, over phone call or online, except where otherwise noted.¹



SURVEY SAMPLE

Total number of unique respondents per region over 8 weeks



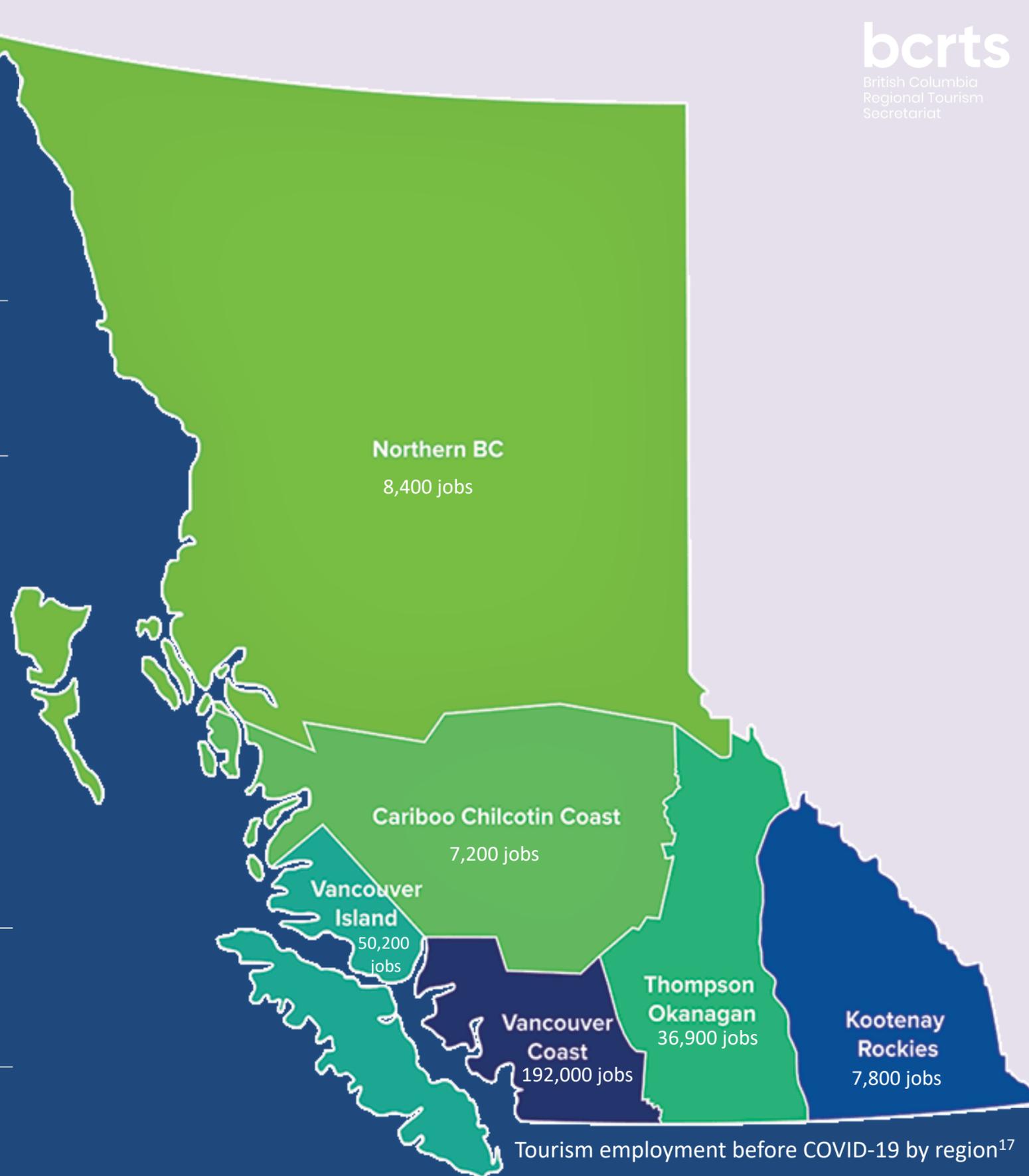
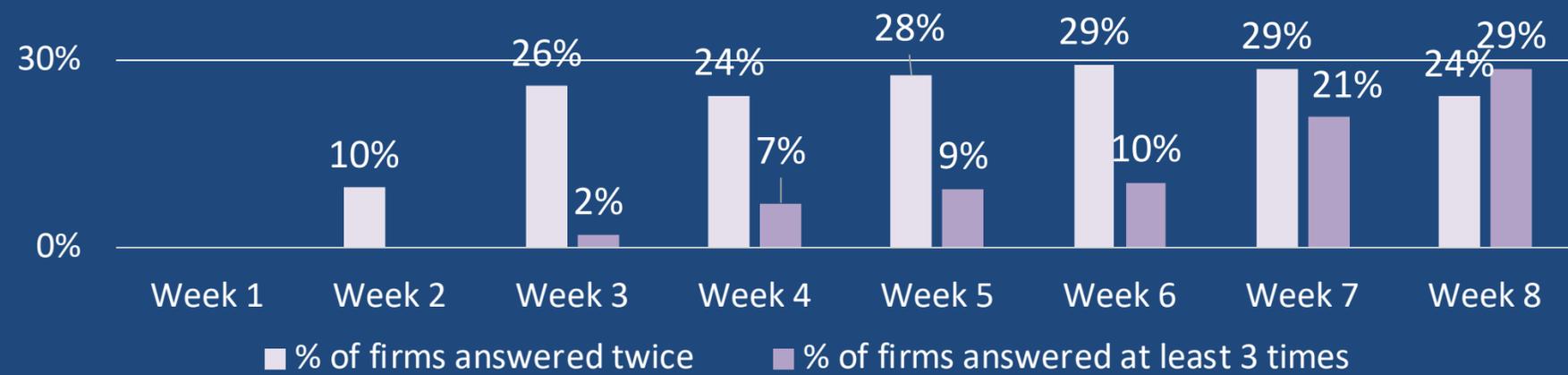
2315

businesses reached

3315

surveys completed

% of respondents who filled out the survey more than once



Tourism employment before COVID-19 by region¹⁷

Tourism is a cornerstone of the **global economy**²



3rd largest export by
global earnings



1 in 10 jobs
around the world

Tourism is a dominant industry in **Canada**³



2.1% of Canada's GDP



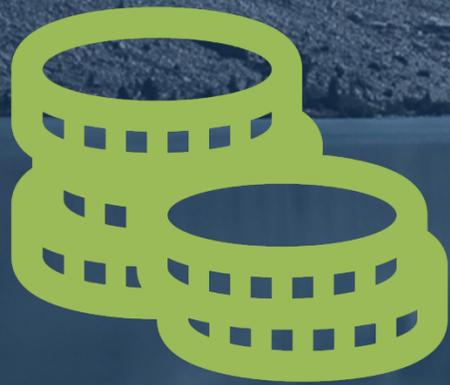
Largest service export in
Canada (\$22.1B)



1 in 11 jobs
across Canada

TOURISM IN BRITISH COLUMBIA

Tourism is one of the largest sectors in BC
in terms of employment and revenue⁴



\$18.4 Billion
in total tax revenues



2.7% of BC's GDP



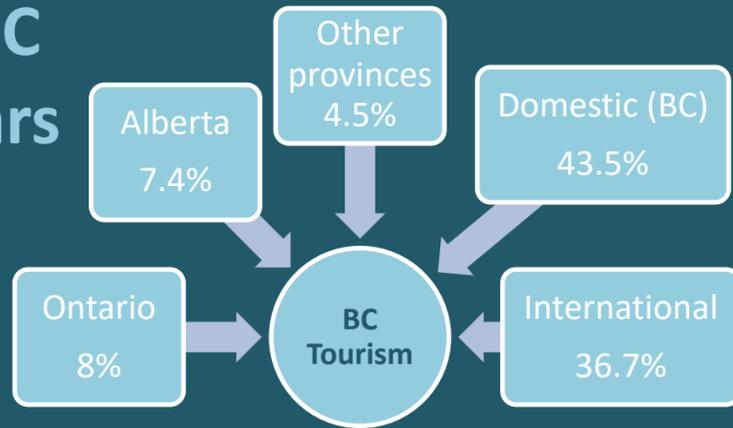
12% of BC's employment,
45% of which is supported by
visitor spending



19,329 tourism-related
businesses

TOURISM IN BRITISH COLUMBIA⁵

Majority of BC tourism dollars come from international and BC itself



TOURISM DEMAND

ECONOMIC CONTRIBUTION

2nd highest tourism contribution to gross domestic product



TOTAL EXPENDITURES



Most expenditures come from domestic demand, except for accommodation and non-tourism products.

CONTEXT

Since the first case of COVID-19 was reported in December 2019, the disease has rapidly spread around the world and affected over five million people.

As an effort to contain the spread of COVID-19, countries worldwide have taken extreme measures, with governments locking down their borders and encouraging people to practice aggressive social distancing.

As a result, the world is facing the worst global recession since the 1930s, and tourism has been the worst affected among all the major economic sectors.



**INTERNATIONAL TOURISM DOWN
BY 22% IN THE FIRST QUARTER**



**A DROP OF 850 MILLION – 1 BILLION
INTERNATIONAL ARRIVALS**



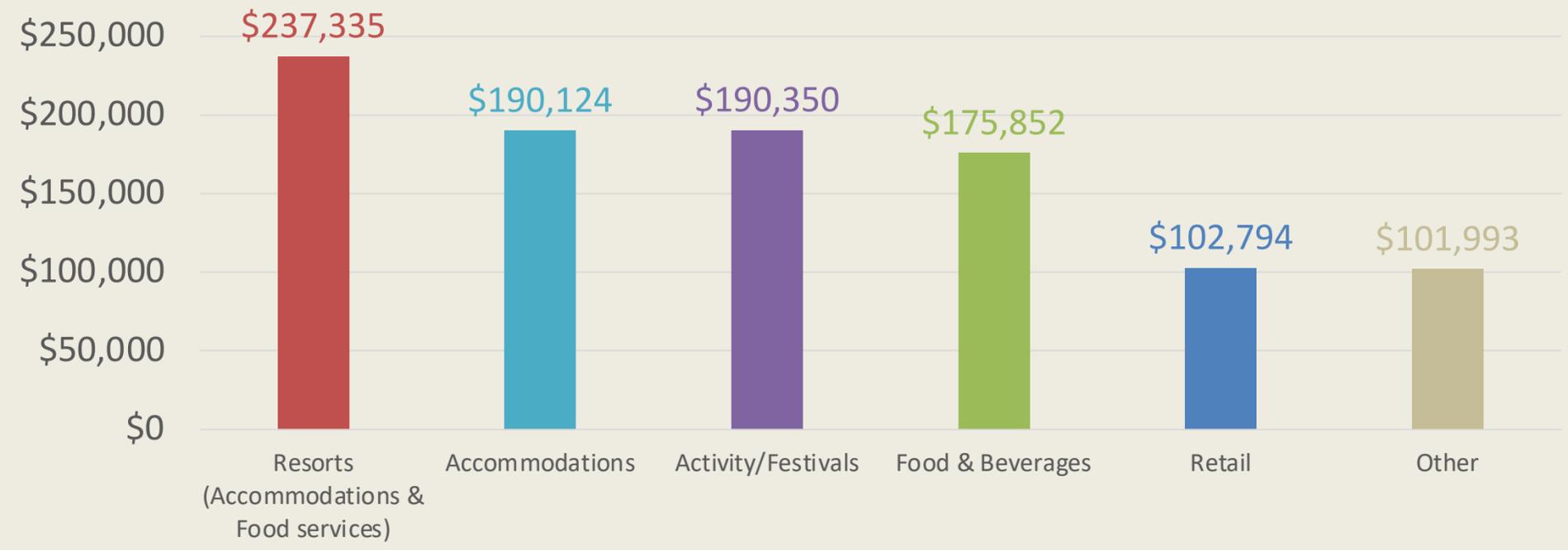
**LOSS OF 860 BILLION USD – 1.2
TRILLION USD IN EXPORT REVENUES⁶**

ANALYSIS: Losses Impact

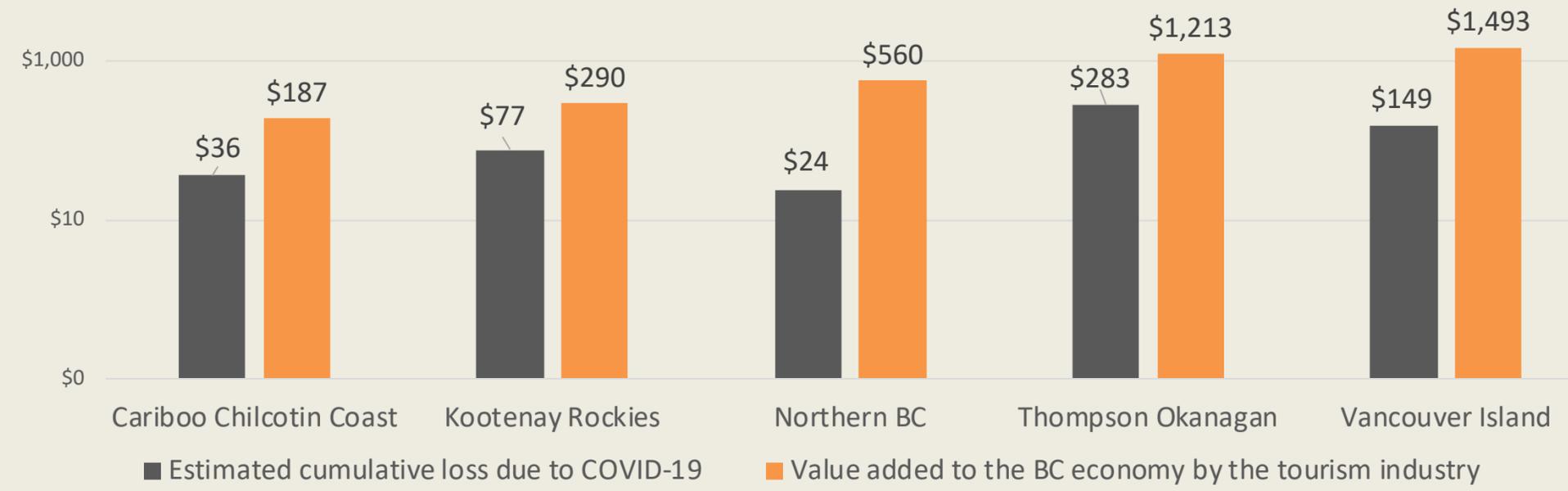
As of May 15, 2020, **Resorts, Activity/Festival, and Accommodations** businesses reported the **highest average losses** per businesses.

The **estimated cumulative loss** in 5 regions due to COVID-19 is **\$568 million**, amounting to **15.2%** of total value contributed to the BC economy by the tourism industry in 2017.⁶

Average loss due to COVID-19, by business types



Rough estimation of cumulative loss due to COVID-19 versus value added to the BC economy before COVID-19 (\$ millions)*



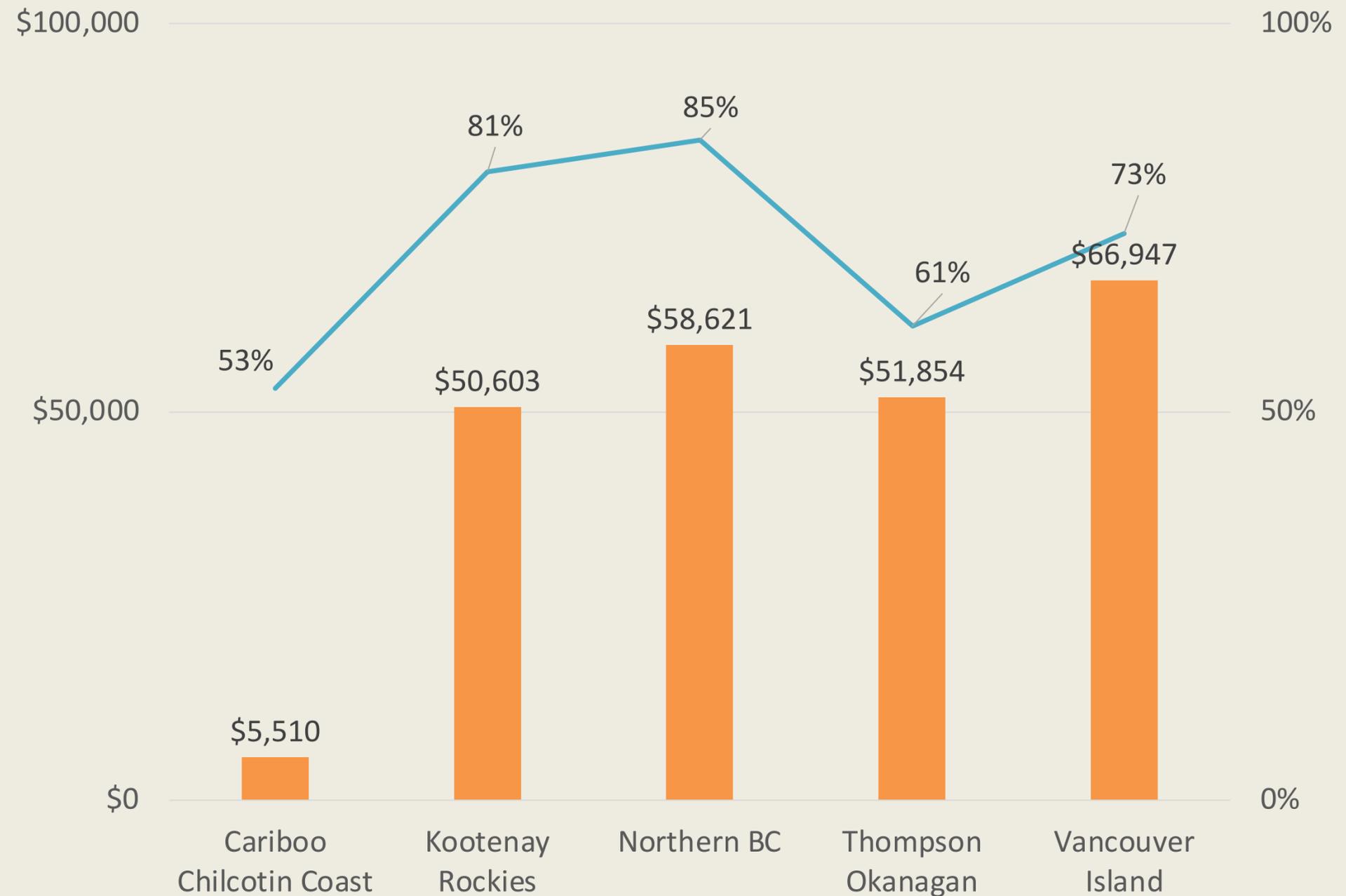
*Data extrapolated based on value of tourism by region in 2017 (in 2012 constant dollars). For comparison purposes, we calculated the equivalent values in 2020 dollars.⁶ Please see page 26 for calculations.

ANALYSIS: Revenue Impact

On average, **businesses across the province lost \$59,617 in revenue (71%)** just in the month of April, compared to the same month last year.

One estimate reports that **British Columbia will lose 6.1 billion dollars in tourism spending during 2020 from COVID-19**, which translates to average lost revenue of more than 300 thousand dollars per tourism business.⁷

Average and % decrease in April revenue: year-over-year revenue differences, by region

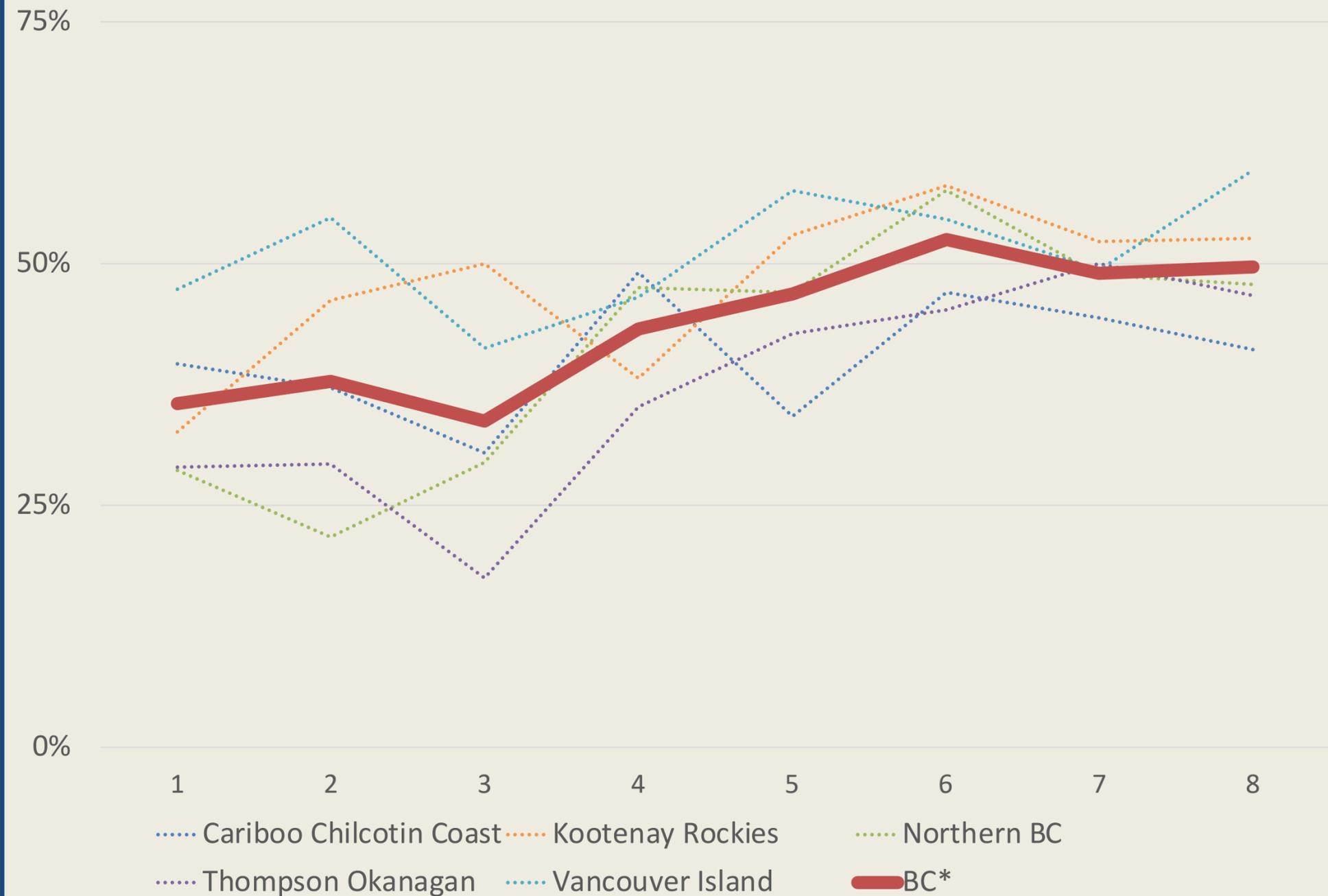


ANALYSIS: Business Closure

Over the course of 8 weeks, the percentage of businesses that have closed their operations increased from **36% to 50%**.

In comparison, survey results from Canadian Federation of International Businesses (CFIB) showed that as of May 14th, 23% of businesses in all industries across **Canada** have closed their operations due to COVID-19.⁸

% of businesses that have closed due to COVID-19 over 8 weeks



*Data for BC includes Vancouver, Coasts & Mountains

ANALYSIS: Safety Measures Impact

Relaxations of travel restrictions within BC is most needed for firms to remain in business, with **more than half of businesses say they cannot continue to operate more than 3 months if the restriction is enforced.**

On the other hand, many firms may still be able to **operate while following social distancing measures.**

How long firms can **remain in business** if different types of restriction are in place



ANALYSIS: Safety Measures Impact

Overall, **domestic travel restriction** have a **higher impact** on businesses than international travel restrictions and social distancing measures.

However, according to the UN World Tourism Organization, **domestic demand is expected to recover faster than the international demand.** Recovery is expected by the last few months of 2020, but mostly in 2021.⁹

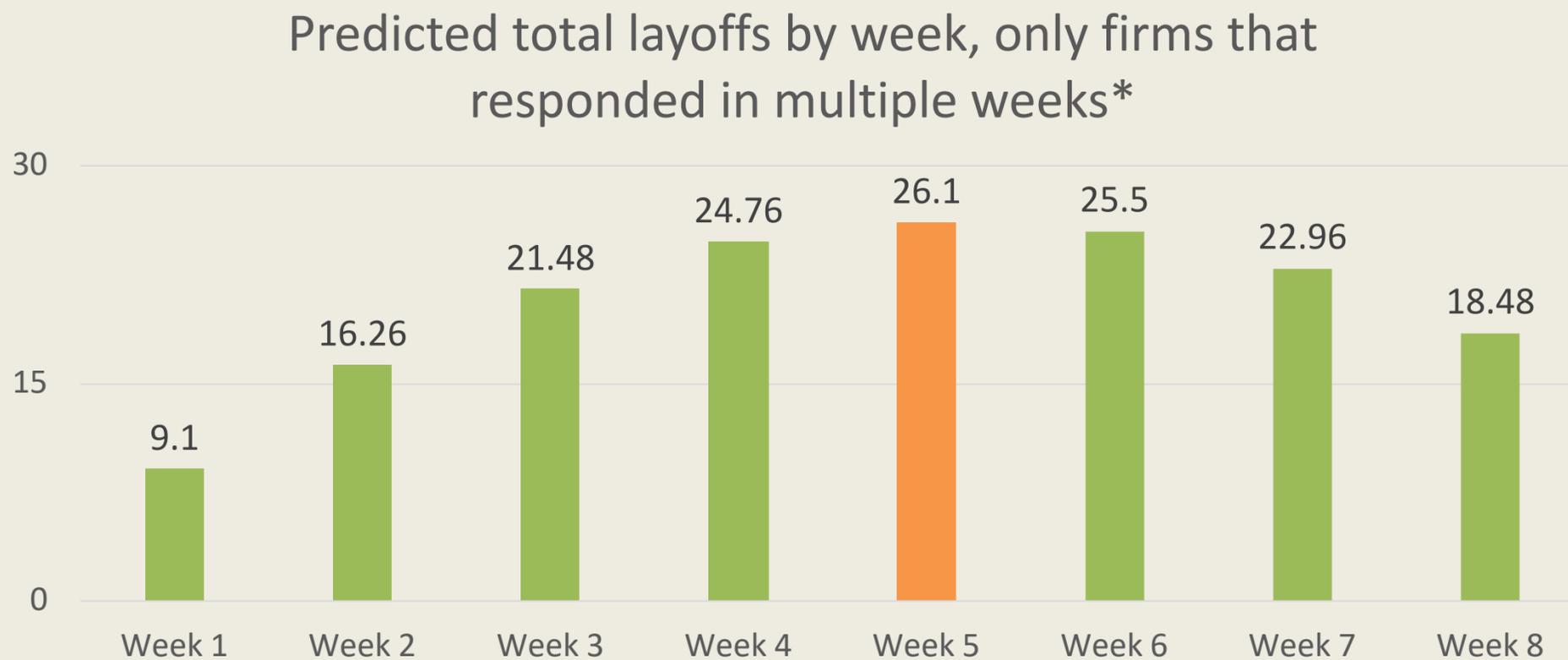
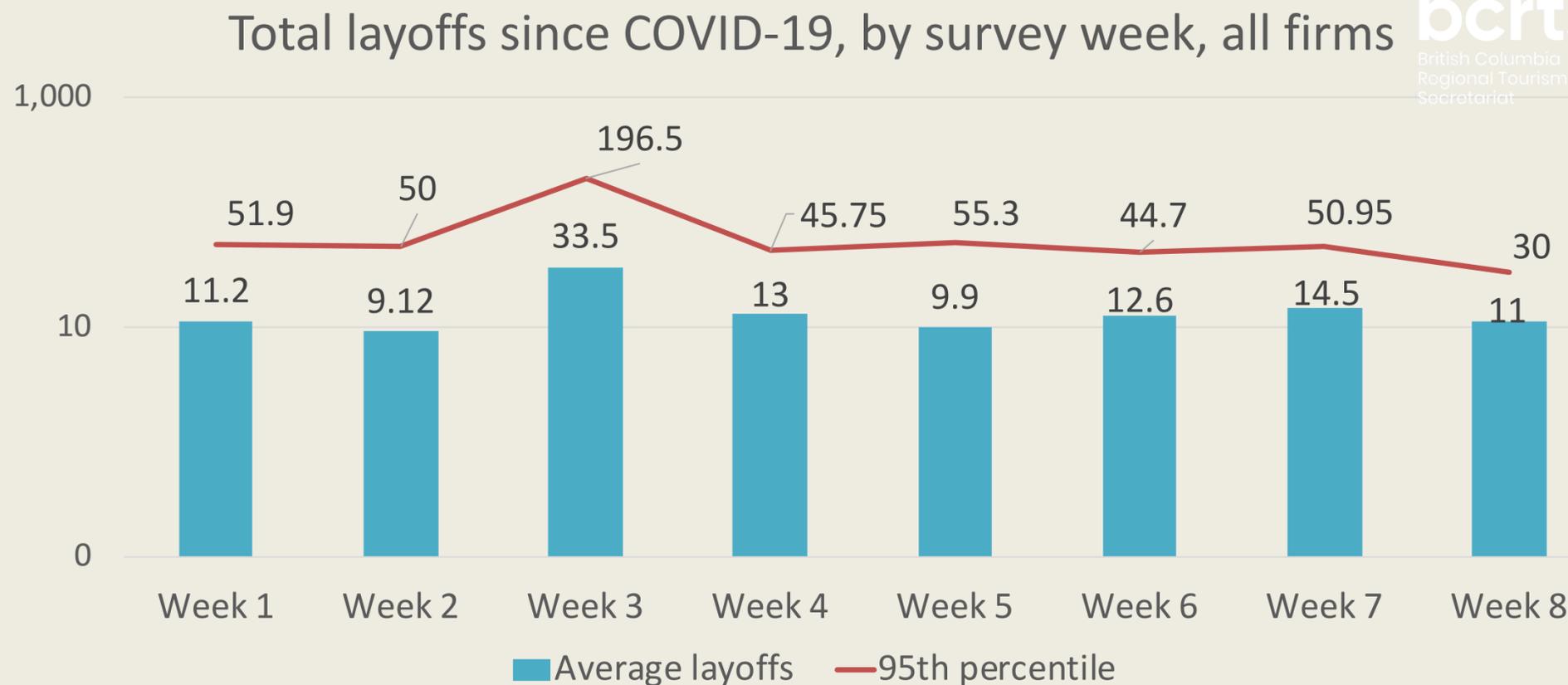


ANALYSIS: Employment Impact

In comparison, survey results from Statistics Canada show that from April 2019 to April 2020, businesses in **Accommodation & Food Services** and **Information, Culture, and Recreation** had the greatest decrease in employment rate (-57% and -38.4% respectively), compared to other industries in British Columbia.¹⁰

Controlling for firms that have responded to our surveys in multiple weeks, the data show that **layoffs increased over time, flattened out, and then began to decrease.**

→ There is preliminary evidence that **layoffs may have peaked in week 5** (April 20-24).



*Controlling for firm fixed effects, this chart reports estimated layoffs based on a linear and quadratic time variable, to see changes in this sample over time.

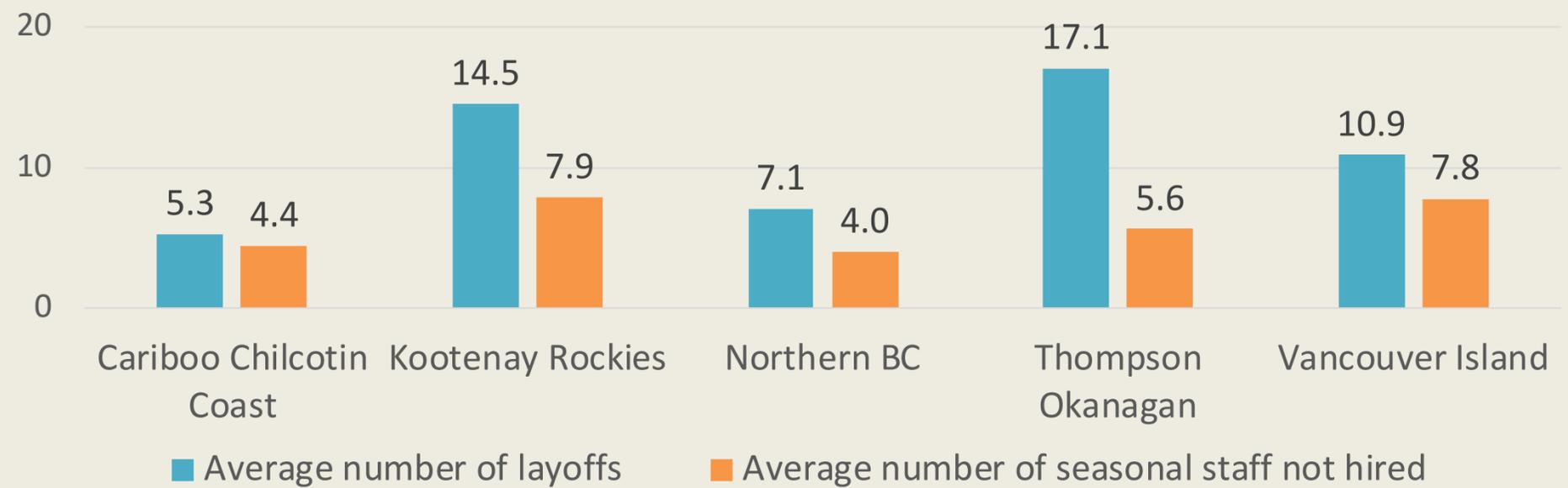
ANALYSIS: Employment Impact

The **estimated total** number of **layoffs** and number of **seasonal staff not hired** across these 5 tourism regions are **47,000** and **33,000**, respectively.

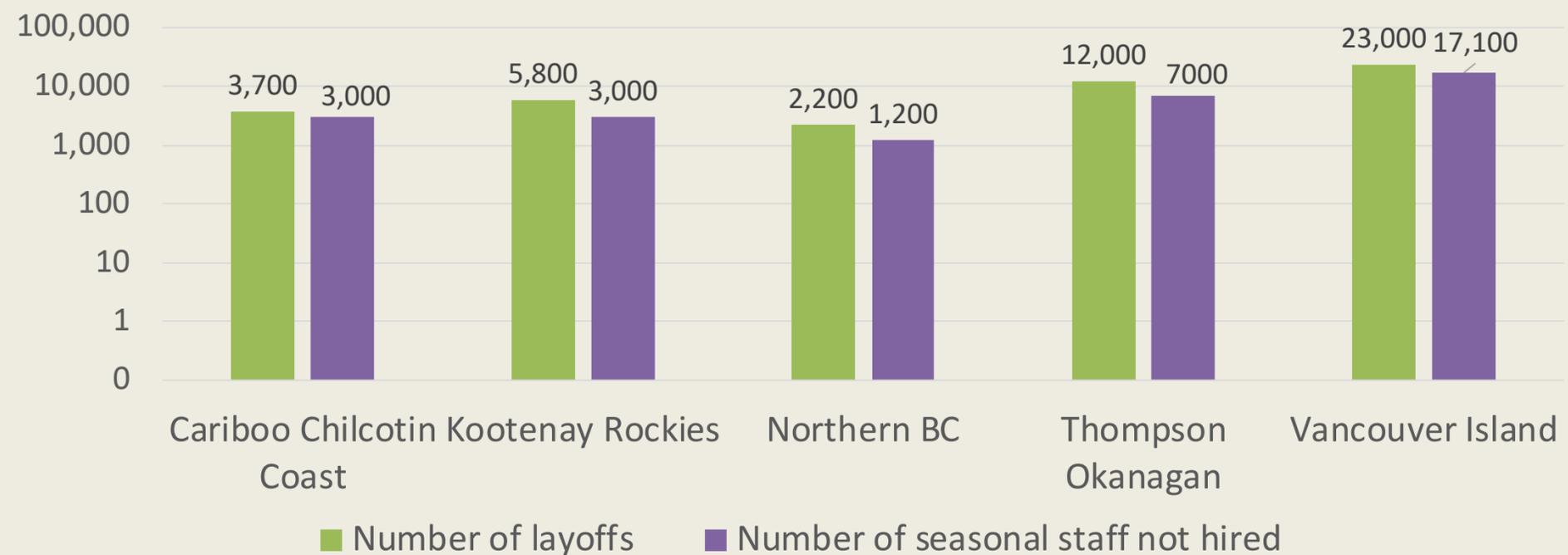
As restrictions start to be lifted, **businesses are expected to face challenges in re-hiring staff:**

- The BC tourism industry has a voluntary turnover rate that is 3 times higher than any sector in the province (24% vs. 8.6%).¹¹
- Traditionally, there has been a shortage of labor supply for the tourism industry in BC. In 2013, 70% of accommodation businesses in BC reported they could not hire enough staff.¹²

Average number of layoffs and average number of seasonal staff not hired due to COVID-19, by region



Rough estimate of total number of layoffs* and seasonal staff not hired* due to COVID-19, by region



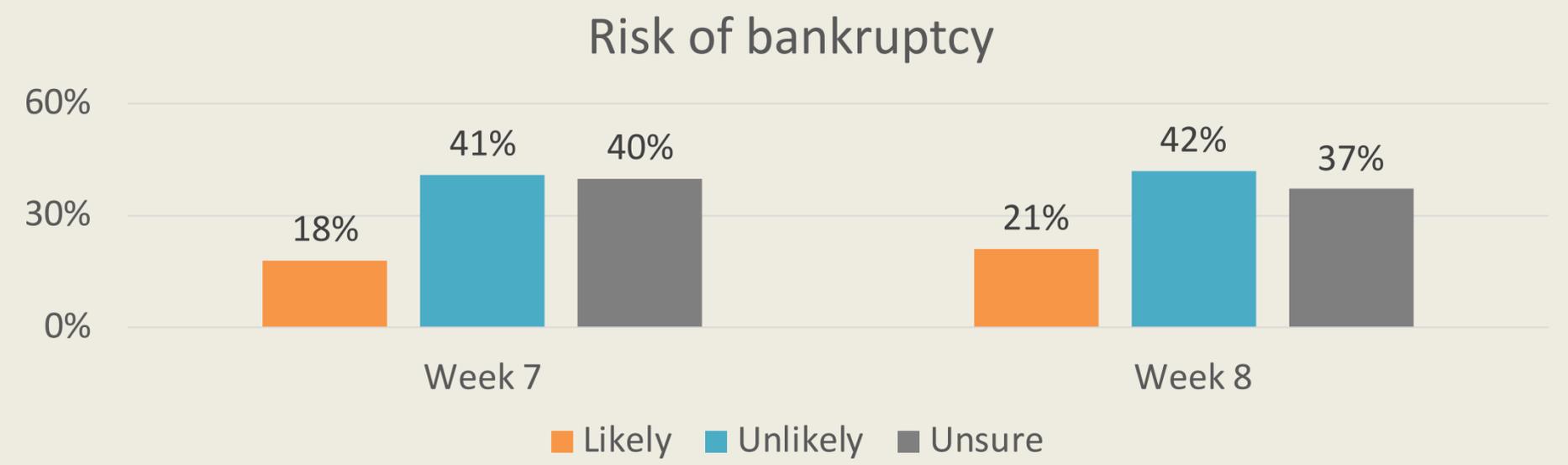
*Data extrapolated based on the total number of employees in the tourism industry by region pre-COVID-19 on go2HR's website.⁴ Please see our assumptions for this calculation on page 26.

ANALYSIS: Solvency Impact

As of May 15, 2020, **20%** of surveyed businesses reported that they are **likely to face bankruptcy**.

Among all Canadian industries, **Arts, Entertainment, and Recreation** has the highest % increase in number of total insolvencies from March 2019 to March 2020 (34.4%).¹³

According to the Government of Canada, all regions of British Columbia, except for Northern BC, saw an **increase in total insolvencies** filed by consumers from March 2019 to March 2020. Cariboo Chilcotin Coast had the highest rate of increase, at 18.3%.¹³



Of those who report they are likely to face bankruptcy:



are currently temporarily closed



cannot operate at all if social distancing measures are in place



do not find government programs to be effective

ANALYSIS: Bookings Impact

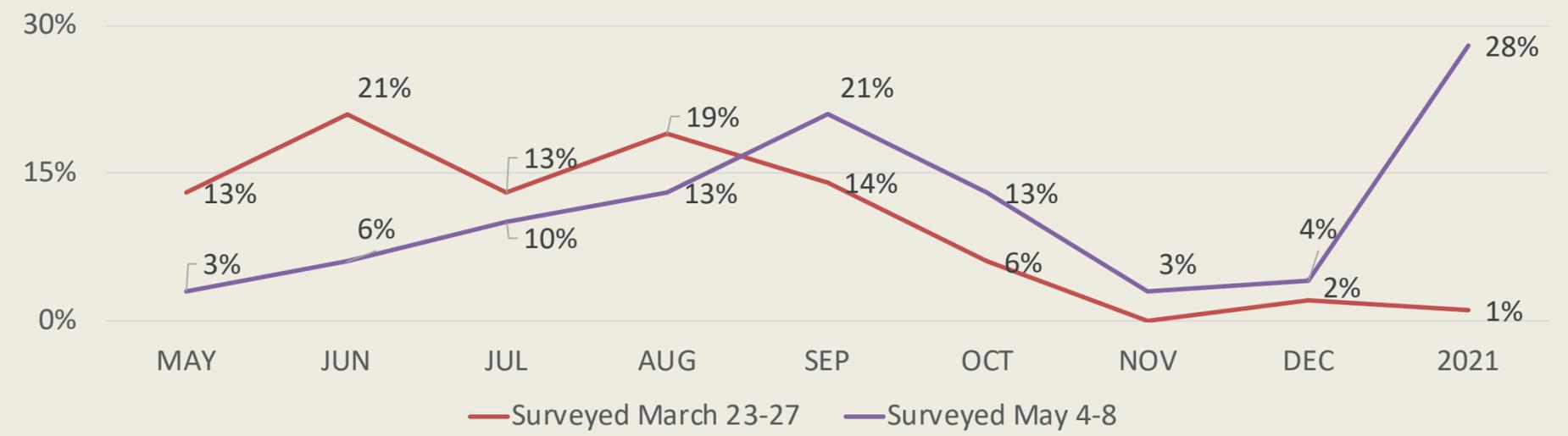
Impact on bookings continues to push forward, with 70% of firms seeing slower booking in September and beyond, as opposed to six weeks prior, when most firms saw slower bookings from May to August.

Businesses with an international clientele are seeing cancellations right through the fall and into 2021. Meanwhile, businesses with Canadian clients still have a chance to receive existing travelers should the COVID-19 situation improve.

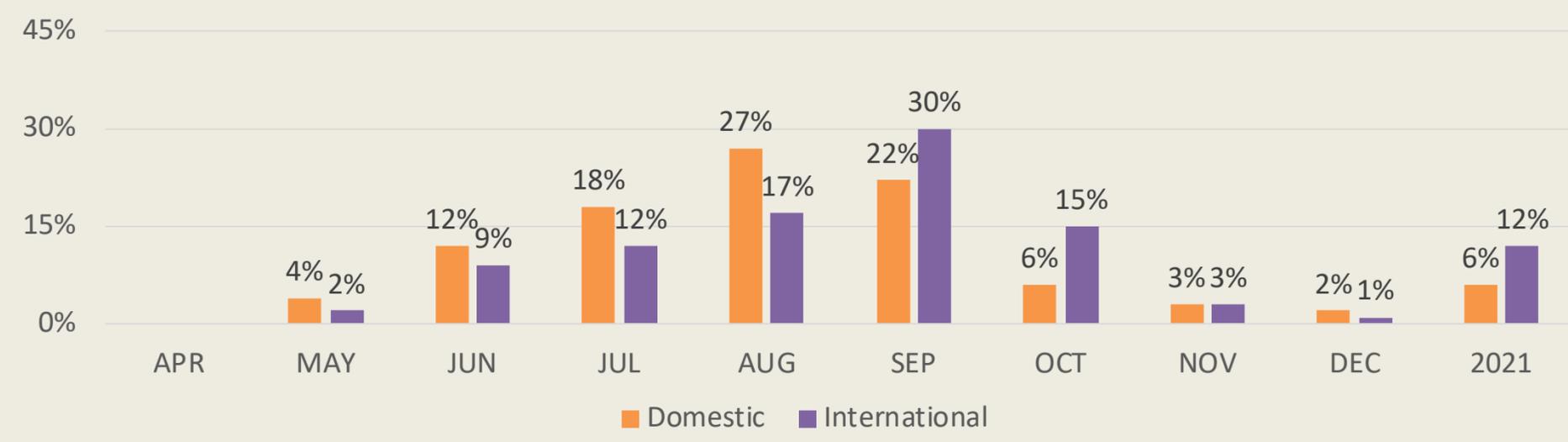
Number of trips to and within Canada in March 2020 largely decreased compared to March 2019:¹⁴

- Trips by residents of Canada: -40.2%
- Trips by non-residents: -57.8%, of which:
 - US citizen: -58.1%
 - Other countries residents: -57.8%

Furthest out businesses are seeing a change in the pace of future bookings



Furthest out businesses are seeing a change in the pace of future bookings, by type of customers*



*The results are taken from Week 7 survey: May 4-May 8, 2020

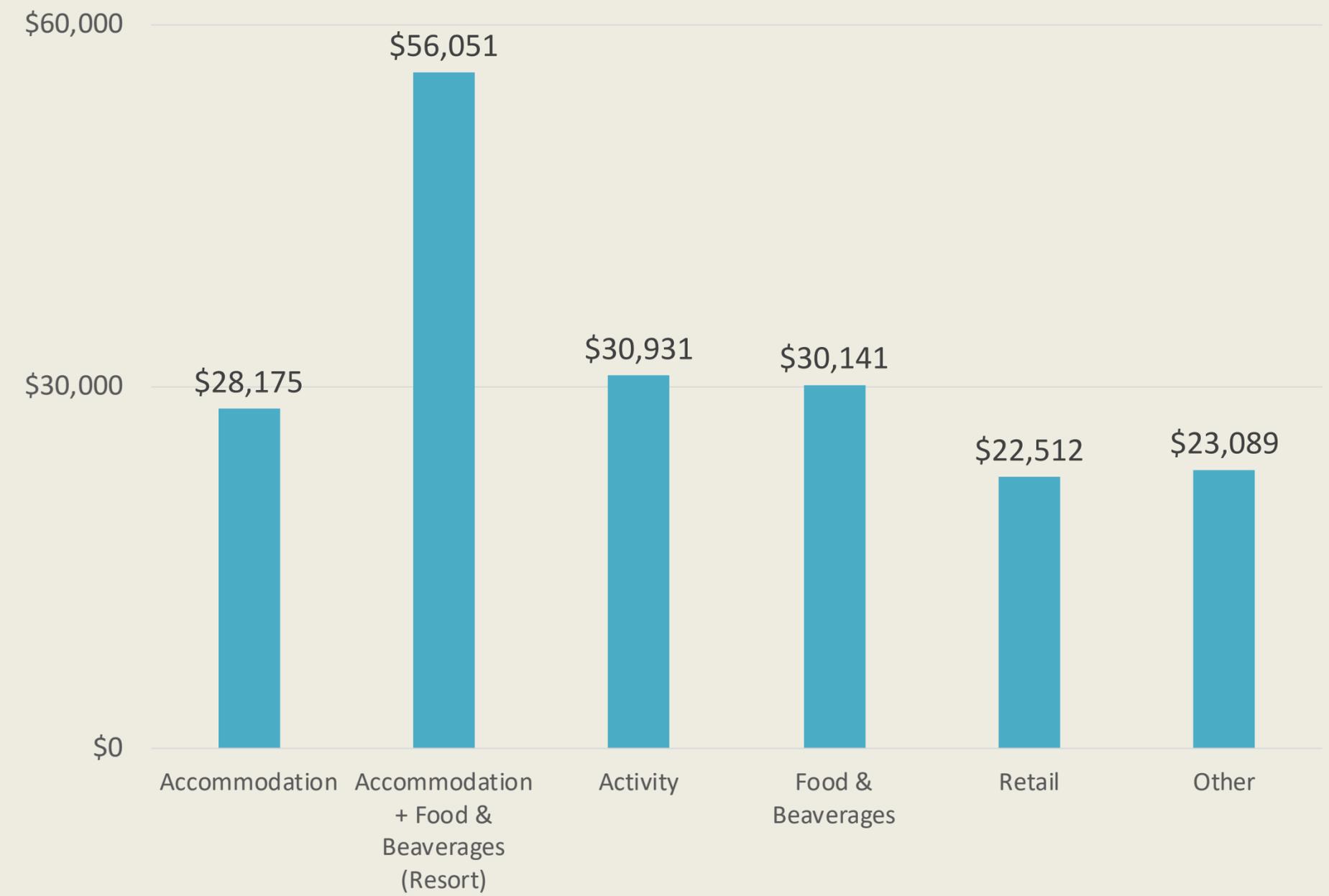
ANALYSIS: Support Required

Resorts need the highest amount of financial support to stay solvent. The COVID-19 pandemic has posed great challenges to the accommodation sector in general, and to the accommodation with food & beverages (resorts) sector in particular.

In Canada, occupancy, average daily rate, and revenue per available room have dropped significantly from May 12-18, 2020 compared to the same week in 2019:

- Occupancy rate: 18.4% (-72.5%)
- Average daily rate: \$101.5 (-38.8%)
- Revenue per available room: \$18.75 (-83.2%)¹⁵

Average amount of monthly financial support required per business to stay solvent, by business type



ANALYSIS: Expectations for Reopening

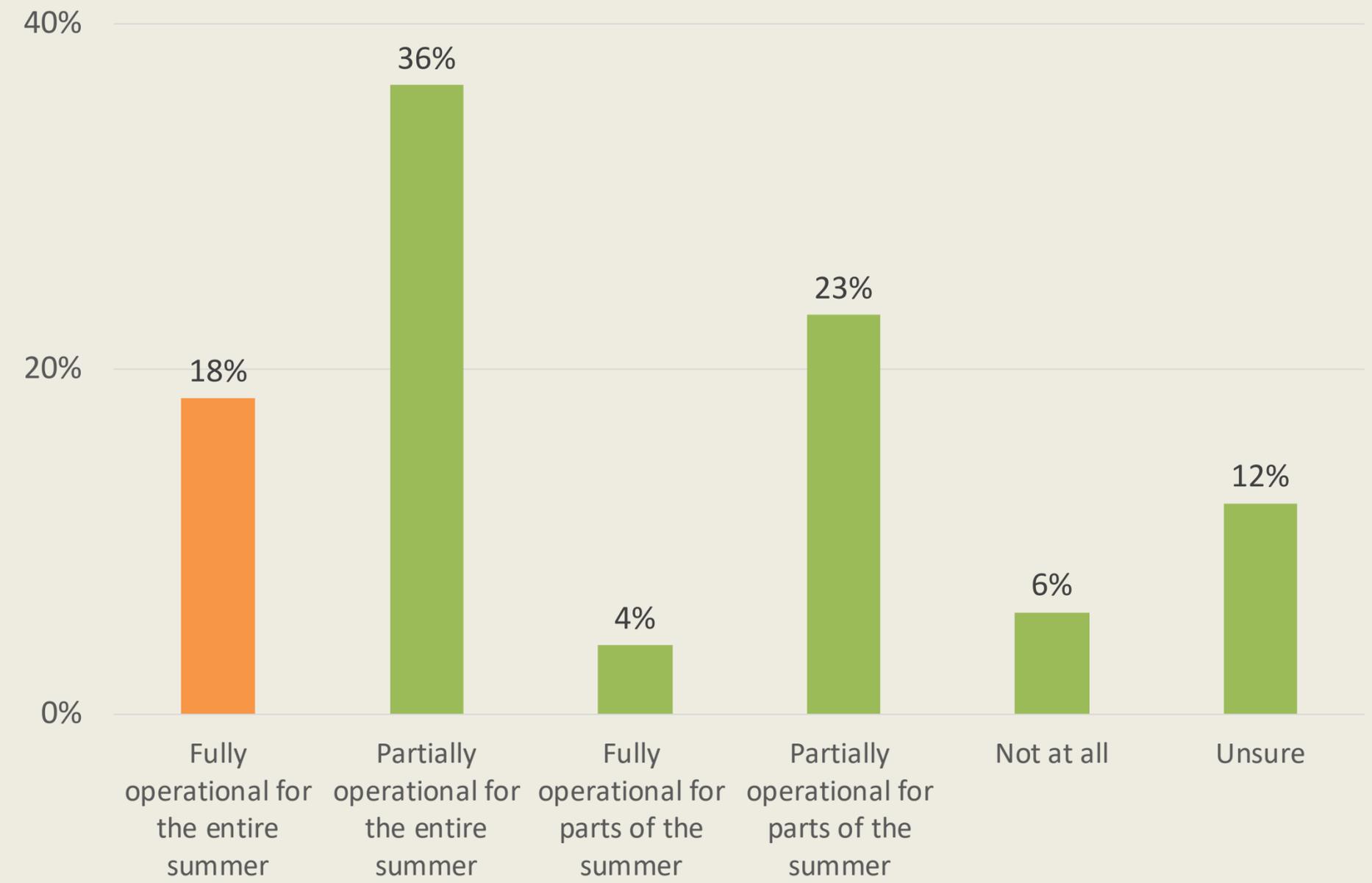
Only **18%** of businesses expect to be fully operational for the entire summer.

Main concerns for re-opening:

- **Not having enough customers** to make profit
- **Restrictions may be put back in place**
- Operating increases the **risk of COVID-19**

“We may go bankrupt and lose everything if we open at 50% capacity- it takes more revenue than that to break even and pay rents and bills. Also, if COVID-19 comes back, what is our plan? Shut down again? If we didn't already go bankrupt, we sure will if we have to close down again.” – Kootenay Rockies, Accommodation owner, May 6, 2020

Expectations to remain open during the summer tourism season*



*This question was only asked to those who are still operating their business.

ANALYSIS: Expectations for Reopening

Increased investment in regional and business marketing that is aligned with rebuilding social licence is reported as the most needed support for businesses. This is consistent with the stories and feedback that we have been receiving from businesses, which often highlight the need for increased regional support in marketing, safe messaging and content:

“Developing marketing content is a challenge for most small operators in a normal business environment. Developing content now, and for the upcoming year when revenue is expected to be substantially lower, is particularly difficult. **Opening up funding for content creation to small businesses would be helpful to allow us to survive this situation.**” - Activity owner, May 4, 2020

Additional help from government that would be useful for re-opening



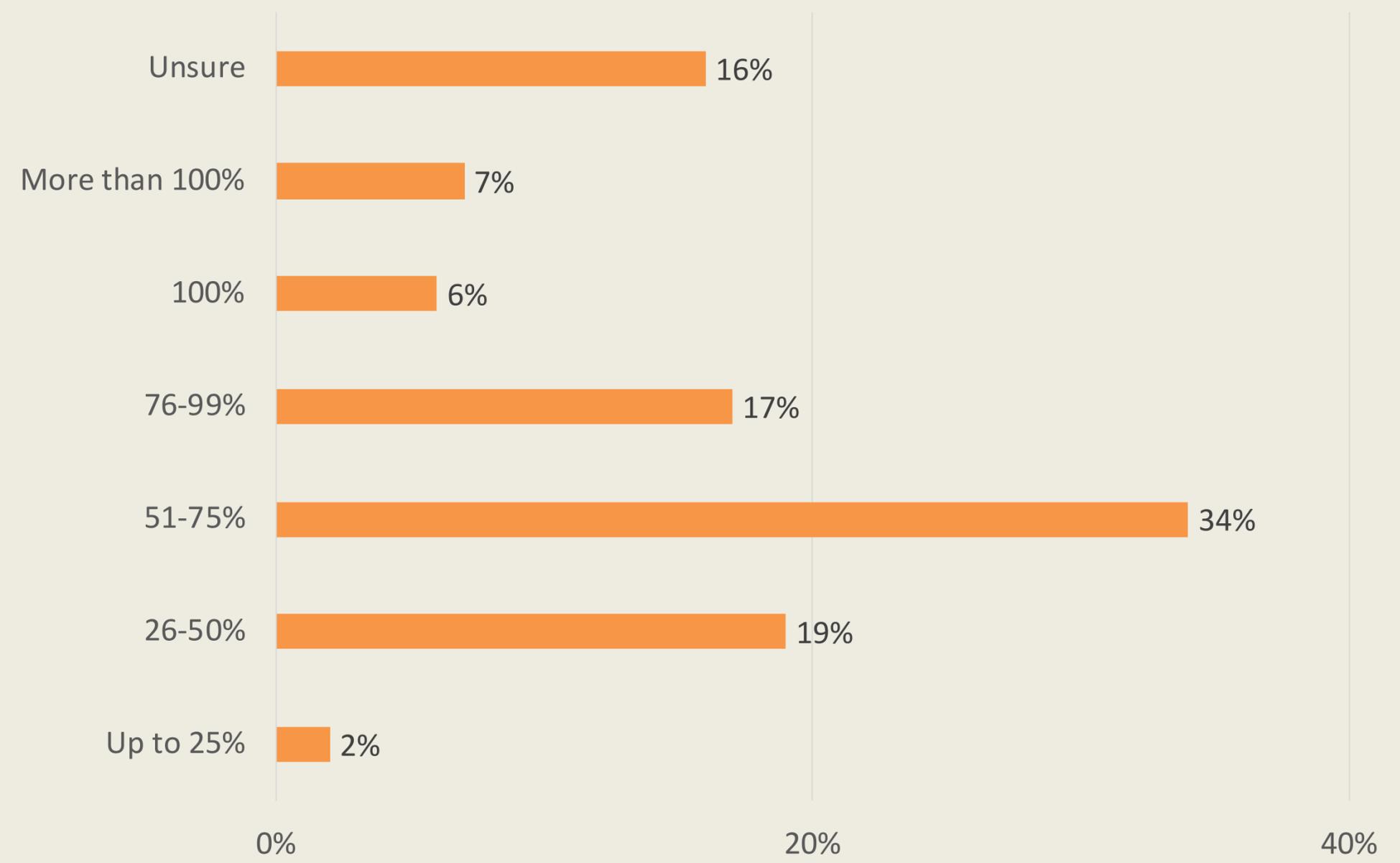
ANALYSIS: Expectations for Reopening

While most businesses need to make more than 50% of their typical sales in order to make it worthwhile to be open through the summer, demand for tourism in Canada is at a historical low:

According to the International Civil Aviation Organization, international passenger numbers could decline 44% to 80% in 2020.⁹ Meanwhile, the hotel industry recorded large double-digit declines in revenue per available room (RevPAR) across all world regions in March 2020.⁹

Studies show that while people still plan to travel for the next 12 months, the propensity to spend is significantly lower, with 30% of the public saying they would spend less for drinking, eating out, culture & entertainment, short vacations, and long holidays.¹⁶

% of typical sales needed to make it worthwhile for businesses to be open through the summer

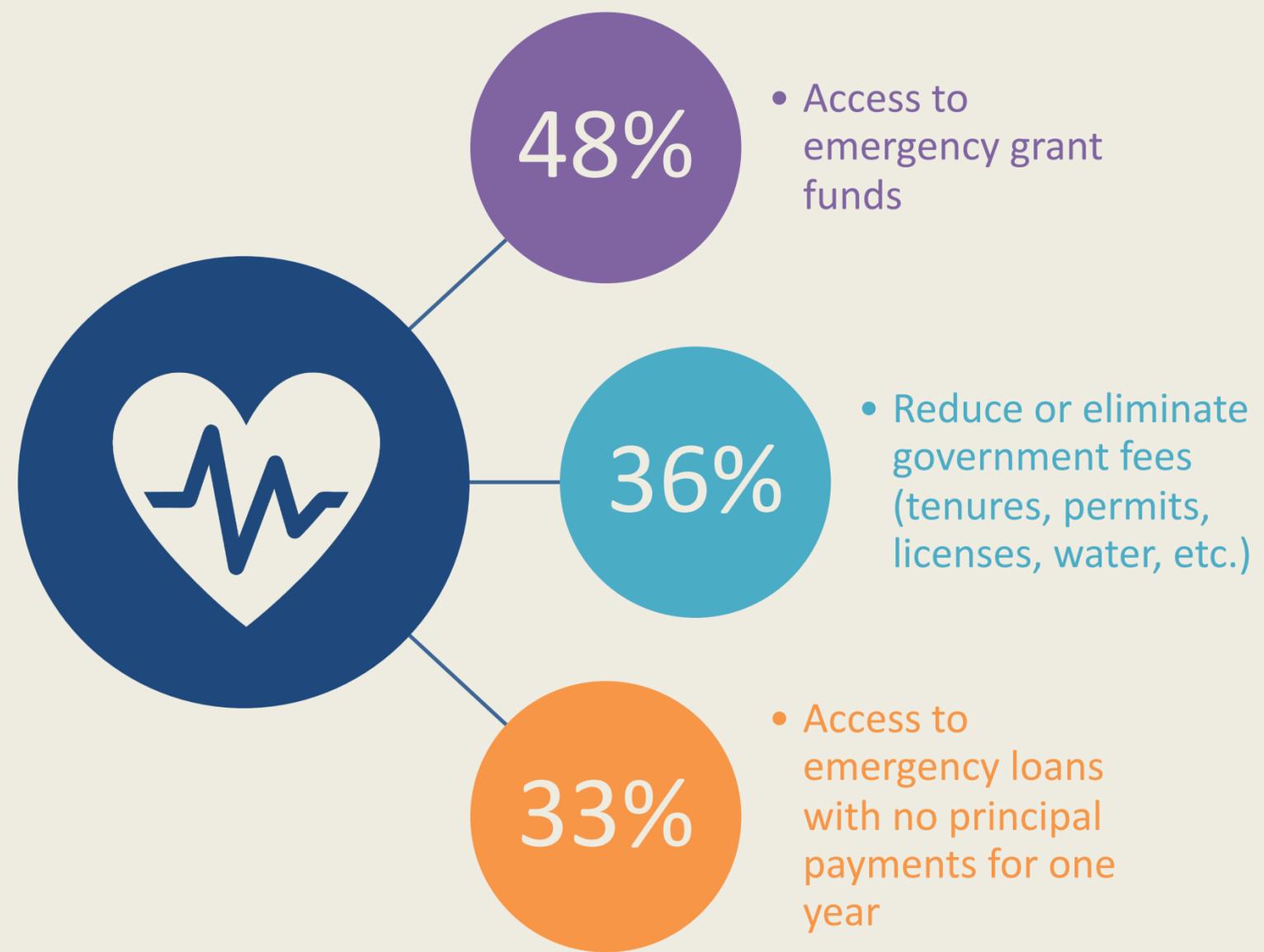


ANALYSIS: Government Responses

The government programs that are most essential to firms' survival are: *access to financial aid packages* and *reduction of government fees*. This is driven by the *cash-flow crisis* that business are facing.

Though not the most pressing issues, *clarification on eligibility* and *streamlined access* are recurring messages that we have received from businesses.

TOP 3 MOST NEEDED GOVERNMENT RESPONSES TO ENSURE THE SURVIVAL OF TOURISM BUSINESSES IN BC*



*Data for BC includes Vancouver, Coasts & Mountains

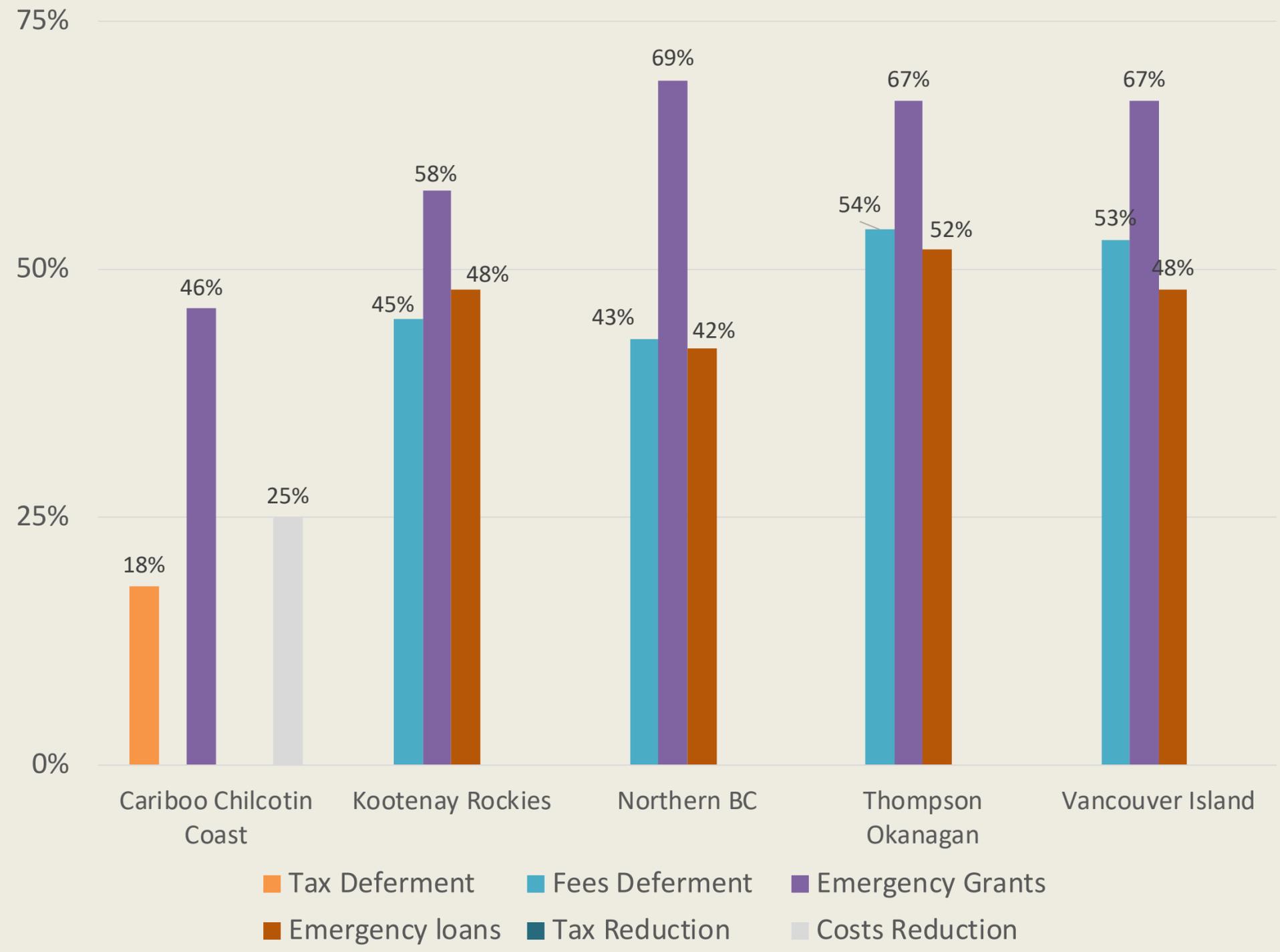
ANALYSIS: Government Responses

Despite the common trends, *each region needs different types and level of support*, suggesting that government programs should consider regional differences when making decisions.

“Decision making needs to reflect the differences between the Lower Mainland and the rest of BC. Losses from this summer alone will be far greater than from the wildfires in 2017.”

– Cariboo Chilcotin Coast, Accommodation owner, May 4, 2020

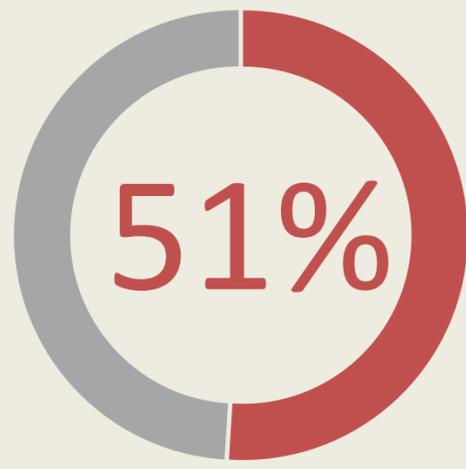
Top 3 most needed government action to ensure the survival of businesses, by region



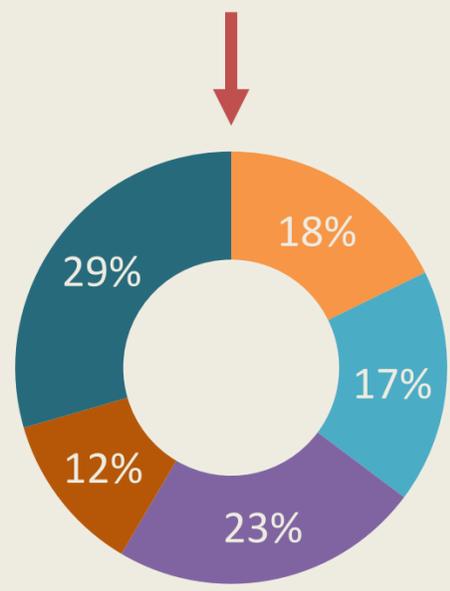
ANALYSIS: Government Responses

“Thank you for all the help and support for small businesses like ours. I am so glad that we have a government that cares about us and is doing the best they can to help us. It is much appreciated!”
– Vancouver Island, Activity owner, May 5, 2020

“The CERB benefit has made all the difference for us. Thank you, BC! Thank you, front line workers! Thank you, Canada!”
- Kootenay Rockies, Accommodation owner, May 12, 2020

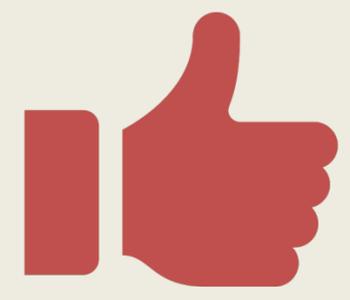


As of May 15, 2020, **51%** of surveyed businesses have received at least one government support program or financial assistance



- Extremely Effective
- Very Effective
- Somewhat Effective
- Not So Effective
- Not At All Effective

58% of those who have received support or assistance rated these programs as **extremely effective, very effective, or somewhat effective.**



Most effective programs are:

- CERB**
87% had a positive experience with the program
- BC Emergency Benefit for Workers**
77% had a positive experience with the program
- CEBA**
74% had a positive experience with the program

ANALYSIS: Government Responses

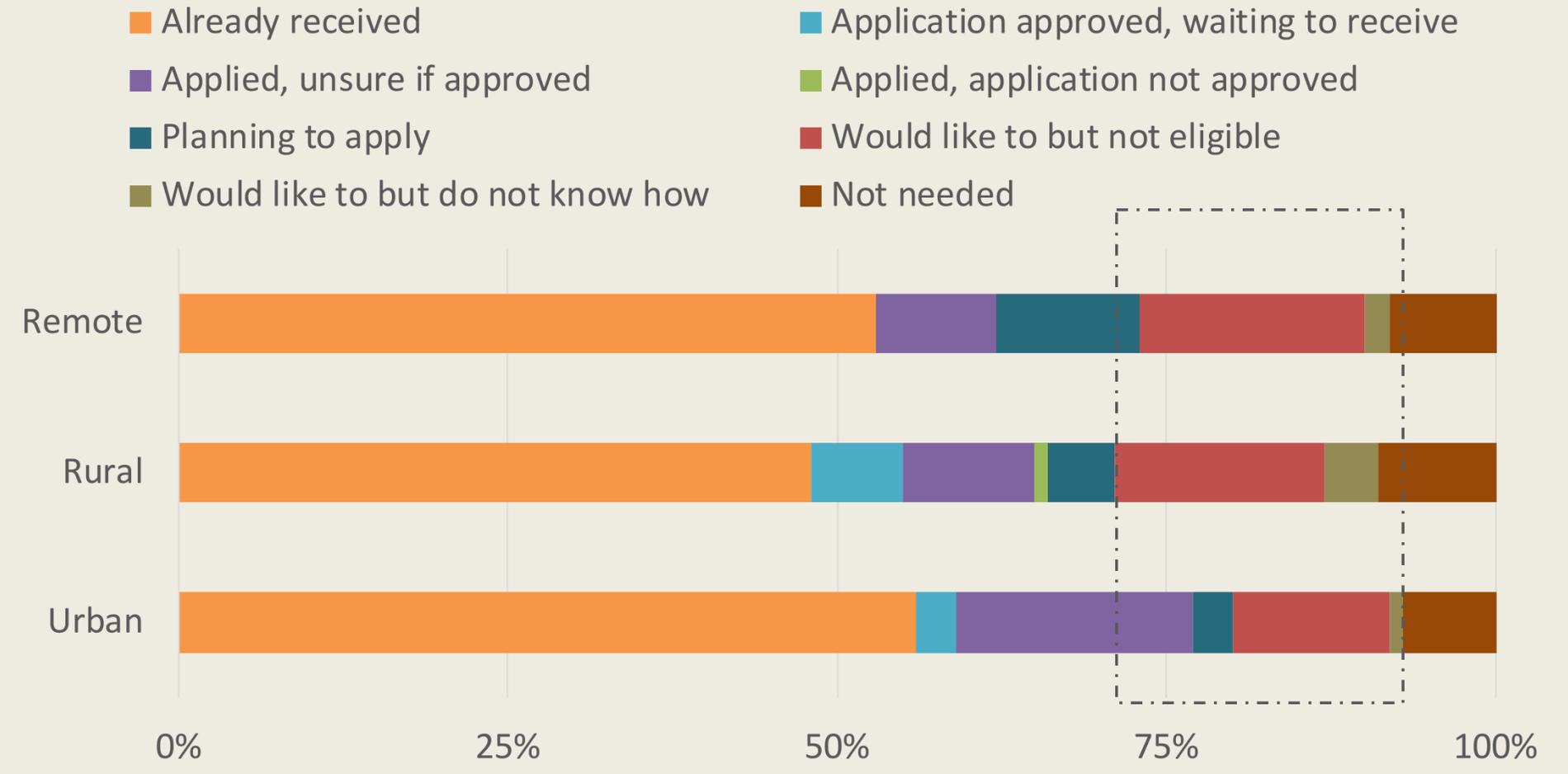
Urban businesses are slightly more likely to have accessed government programs, and much more likely to have applied.

Quotes from those who were not eligible for government programs:

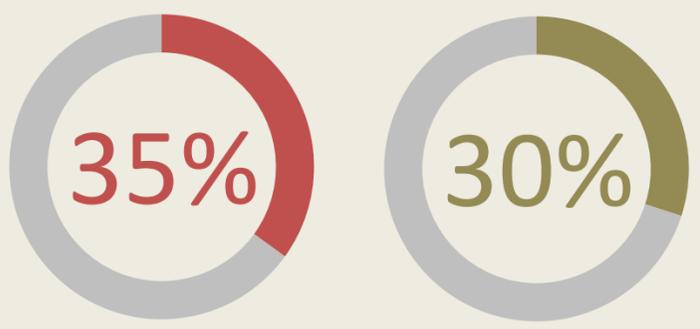
“There is no support for family-run businesses, as they do not have payroll. This will impact many small businesses, many of which are in tourism.” – Northern BC, Accommodation owner, May 6, 2020

“I quit my full-time job 2 years ago to pursue my business, unfortunately that makes me ineligible for CERB and other funding. Last year was our first year in operations, so it is very difficult for me to show a loss in revenue. We don't know how to apply or show eligibility for help, as we're so new.” – Okanagan, Festival & Event owner, May 4, 2020

Access to government programs, by type of area



35% of businesses who are not eligible and 30% of those who don't know how to apply are businesses who are likely to face bankruptcy



LIMITATIONS OF THE SURVEY

Respondents volunteered their time to fill out the survey, and there was no requirement for them to do so. As a result, the responses cannot be considered a random sample. Respondents may not be the same as non-respondents regarding the impact from COVID-19.

We rely on the information provided by the respondents → there is the potential for respondent coded error.

In an effort to "clean" the data, we eliminated duplicate observations as well as some observations that were mathematically implausible. Further data cleaning may change future interpretations of the same survey data.

There may be a "survivor" bias among firms who filled out the surveys. For instance, businesses that were hit the hardest may have closed and no longer respond to future waves of the survey. Similarly, businesses that are thriving might not feel the need to respond to the survey. Both phenomena could bias the responses over time.

ASSUMPTIONS & CALCULATIONS

Assumptions

- The actual total number of employees in the tourism industry in each region was last updated in 2018. Due to the lack of more recent statistics, we assume that there has been minimal changes to these numbers in 2020.
- Although our sample is not random, we have a rich and diverse set of respondents every week. When extrapolating our results, we assume that our sample is representative of the tourism industry in the 5 economic regions that we surveyed.

Calculations

- Estimated total number of layoffs in a region (slide 14)**

$$= \text{Total layoffs from respondents} \times \frac{\text{Total number of employees in the region}^4}{\text{Estimated total number of employees employed by firms who responded to our survey}^i}$$

$$^i = \text{Weighted average of firm size}^{ii} \times \text{number of firms in the region}$$

$$^{ii} = (\% \text{ of firms who said they have 0 employees}) \times 1 + (\% \text{ of firms who said they have 1-4 employees}) \times 3 + (\% \text{ of firms who said they have 5-19 employees}) \times 12 + (\% \text{ of firms who said they have 20-99 employees}) \times 60 + (\% \text{ of firms who said they have 100-249 employees}) \times 175 + (\% \text{ of firms who said they have 250-499 employees}) \times 375 + (\% \text{ of firms who said they have 500+ employees}) \times 750$$

- Estimated total number of seasonal staff not hired in a region (slide 14)**

Same calculations as layoffs, except replacing reported layoffs with reported number of seasonal staff not hired

- Estimated cumulative loss due to COVID-19 in a region (slide 8)**

$$= \frac{\text{Average loss reported by firms in that region}}{\text{Expected number of employees per firm in that region}} \times \text{Total number of employees in the region}^4$$

Note: Our calculations do not estimate standard errors. Our numbers are therefore only rough estimates and are likely to suffer from a high degree of uncertainty. All limitations of the survey mentioned on this page apply to the accuracy of these calculations. Layoffs and seasonal staff not hired (including part-time) may not correspond exactly to employment figures from 2018, and estimated loss to COVID may not correspond exactly to lost economic value added.

Appendix:
 Summary of questions from
 our 8 weekly surveys
 (surveyed from March 23-May 15)

Summary of questions asked	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
% typical sales needed to re-open								✓
Ability to pay April bills					✓	✓		
Business Size					✓	✓	✓	✓
Business Type	✓	✓	✓	✓	✓	✓	✓	✓
Client demographics					✓	✓	✓	✓
Efficiency of government programs					✓	✓	✓	✓
Furthest bookings impact	✓	✓	✓	✓	✓	✓	✓	✓
Furthest cancellations impact	✓	✓	✓	✓				
Future expectations for re-opening							✓	✓
Government support for re-opening								✓
Have you accessed any government programs?	✓	✓	✓	✓	✓	✓		
Have you received any government support?							✓	✓
How long can business stay solvent with restrictions on travel					✓	✓	✓	✓
Impact from other crises (wildfires/floods/etc.)							✓	✓
Impact on business operations	✓	✓	✓	✓	✓	✓	✓	✓
Needed government action	✓	✓	✓	✓	✓	✓	✓	
Open comments	✓	✓	✓	✓	✓	✓	✓	✓
Out-of-pocket COVID expenses					✓	✓	✓	✓
Out-of-pocket wildfires/floods related expenses							✓	✓
Required support for solvency	✓	✓	✓	✓	✓	✓	✓	✓
Revenue impact in April					✓	✓		
Risk of bankruptcy							✓	✓
Support from the provincial government	✓	✓	✓	✓				
Total losses to date	✓	✓	✓	✓				
Total number of layoffs	✓	✓	✓	✓	✓	✓	✓	✓
Total number of seasonal staff not hired		✓	✓	✓	✓	✓	✓	✓
Urban/Rural/Remote							✓	✓
Which government programs have you accessed?					✓	✓	✓	

CITATIONS

¹Data and figures represent a subset of regional tourism operators and are subject to change with changes in coverage, data cleaning, weighting and other statistical correction and/or as data become more complete.

²Data from World Travel & Tourism Council (2019). Source: <https://wttc.org/Research/Economic-Impact>

³Data from Statistics Canada (2018). Source: https://tiac-aitc.ca/_Library/Travel_Economy_Series_/JOBS_-_TIAC_Travel_Economy_Series_EN.pdf
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⁴Data from go2hr and Destination BC (2018). Sources: <https://www.go2hr.ca/about-us/facts-about-tourism-jobs-in-british-columbia> and https://www.destinationbc.ca/content/uploads/2020/03/2018-Value-of-Tourism_Feb-2020_Final.pdf

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and Destination BC, Link: https://www.destinationbc.ca/content/uploads/2020/03/2018-Value-of-Tourism_Feb-2020_Final.pdf. Calculations excluding Vancouver, Coast, and Mountains.

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