

CARIBOO
CHILCOTIN
COAST



Snapshot | 2019 – 2021

A Picture of Tourism in the Cariboo Chilcotin Coast

bcrts

British Columbia
Regional Tourism
Secretariat



Executive Summary

IMPACT OF COVID-19¹



- The majority of firms are **operating at reduced capacity**
- Firms more likely to report **being closed** compared to the rest of BC
- **Activity firms were significantly affected** whereas Food & Beverage and Accommodation firms had decreases in revenue in line with the rest of the province



CEWS¹

Received 37% | 52%
Not eligible 35% | 26%
Didn't need it 17% | 15%

CCC | BC

WEEKLY DOMESTIC VISITORS²



The number of visitors to the region has remained low in 2021



Briefly **surpassed 2019** levels in early April



Decreased by nearly 26% year to date when compared to 2019

STAFFING CAPACITY¹



Increased in June to **47%**
vs 57% BC



Increased in July to **56%**
vs 67% BC



REVENUE & CASHFLOW¹



There has been a **29% decrease** in revenue from pre-pandemic. This is compared to a 21% decrease in BC as a whole.

30% of firms were unable to pay all of their bills in Summer 2021



A 26 percentage point improvement from March 2021, which was 56%



Activity firms were hit the hardest, seeing a 47% decrease in revenue from pre-pandemic times, 17 percentage points more than the rest of BC

Executive Summary

VISITORS³

Top 3 Annual Visitors by City

2021	2020	2019
1. Kamloops	1. Vancouver	1. Surrey
2. Prince George	2. Prince George	2. Prince George
3. Surrey	3. Surrey	3. Kamloops

186,000  37% from 2020
 Visitors in July & August 2021  26% from 2019

Top PRIZM Segments

- 22% Country & Western
- 21% Suburban Sports
- 9% Kick-Back Country

Top EQ Segments

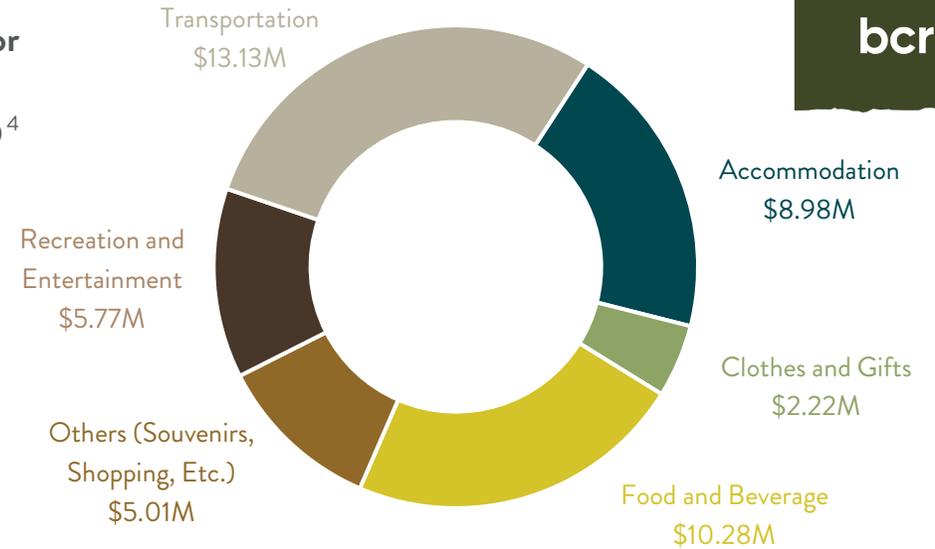
- 24% Rejuvenators
- 20% Gentle Explorers
- 14% Free Spirits

2021 Top PRIZM Segments

- 25% Country & Western
- 22% Suburban Sports
- 10% Indigenous Families



2019 Top Visitor Spending by Category (Millions)⁴



2019 Top Visitor Spending by Origin (Millions)⁴

CANADA		US		GLOBAL	
British Columbia	\$24,251,155	Washington	\$1,180,273	United States	\$5,644,490
Ontario	\$8,911,576	California	\$1,074,867	Germany	\$632,390
Alberta	\$2,054,949	Texas	\$387,894	United Kingdom	\$294,701
New Brunswick	\$1,359,508	Florida	\$230,308	Australia	\$190,737
Quebec	\$260,389	Oregon	\$222,844	France	\$67,306

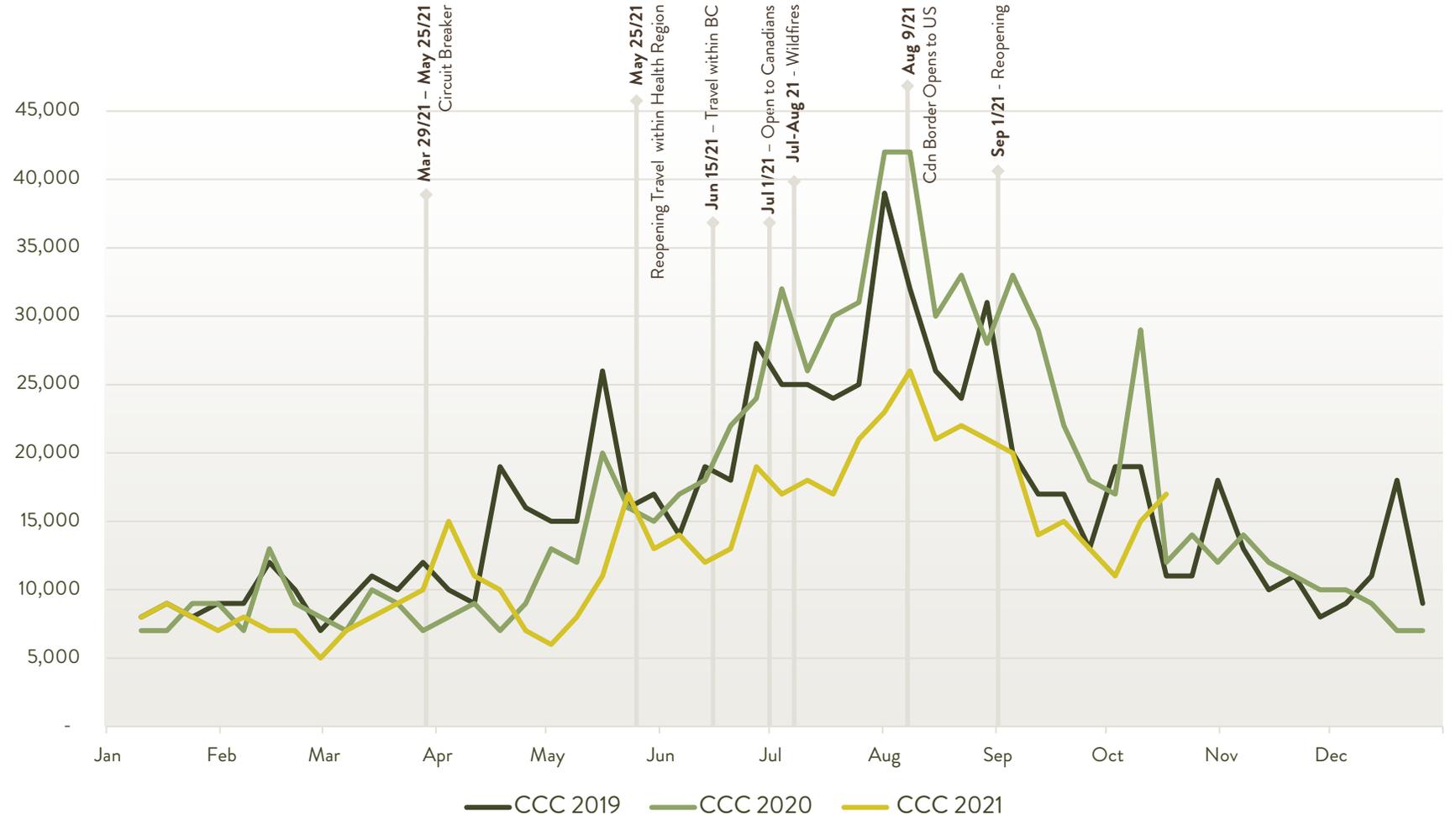
Weekly Domestic Overnight Visitors

The number of visitors to the region has remained low in 2021

 Briefly surpassed 2019 levels in early April

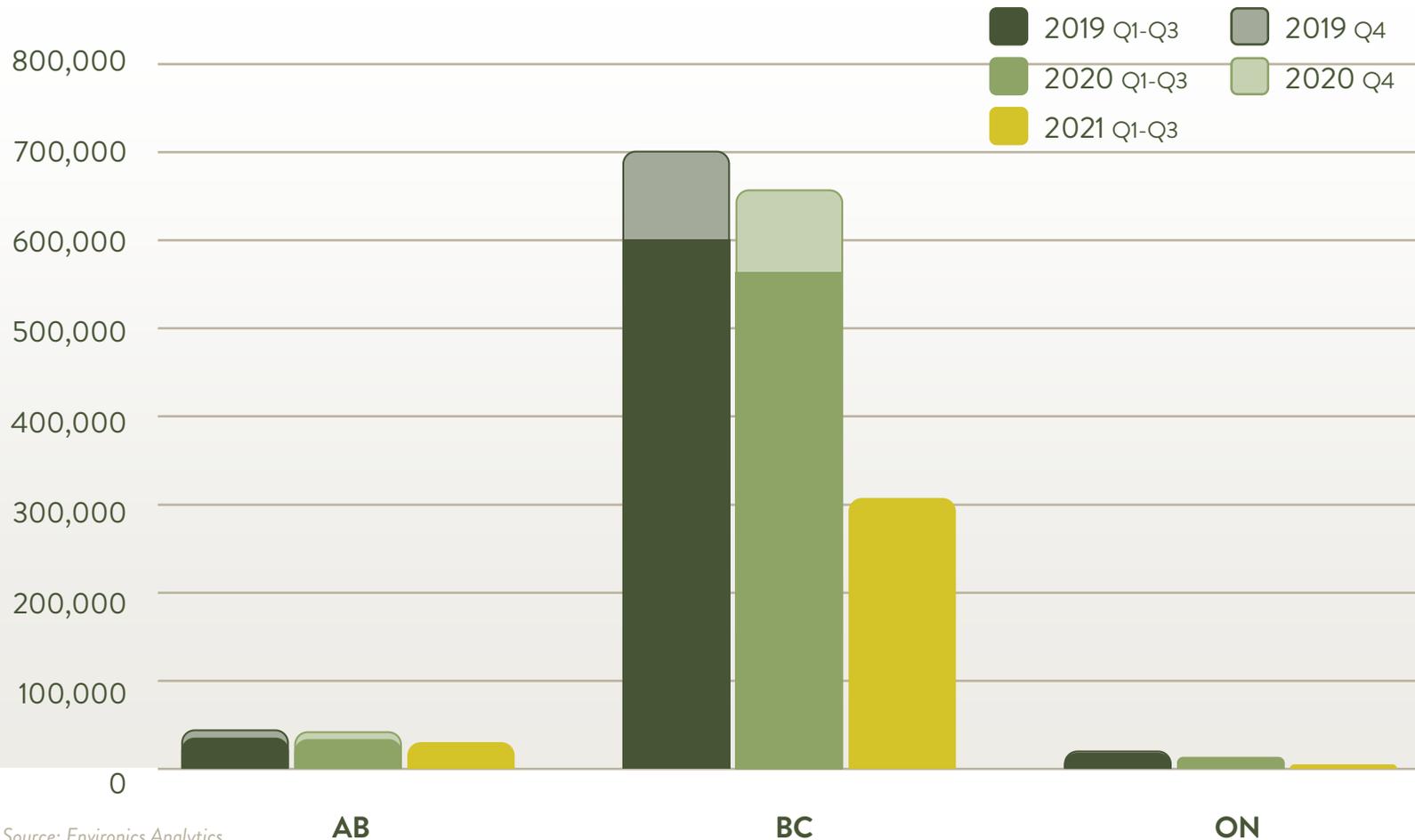
 Decreased by nearly 26% year to date when compared to 2019

NOTE: Data collected for 2021 is January - October 17.



Source: Environics Analytics

Domestic Overnight Visitors



The three largest markets for visitors to CCC, by province, are **Alberta, BC, and Ontario**.

Comparing 2020 to 2019, there was a drop in visitors of:

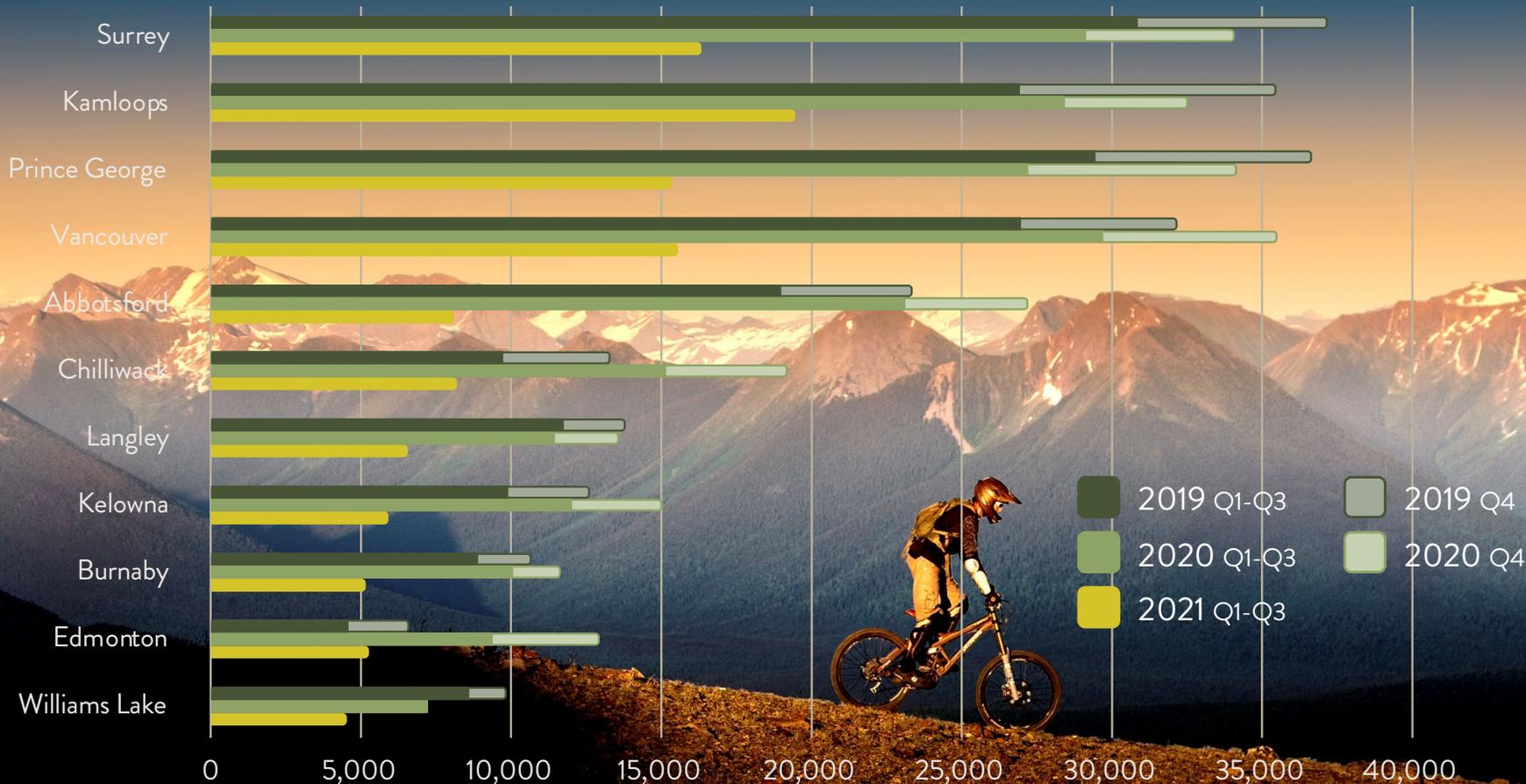
 **5%** from AB

 **6%** from BC

 **33%** from ON

NOTE: Data collected for 2021 is January - September.

Annual Domestic Visitors by City



↓ The number of visitors from the top three cities has declined from 2019 through 2021

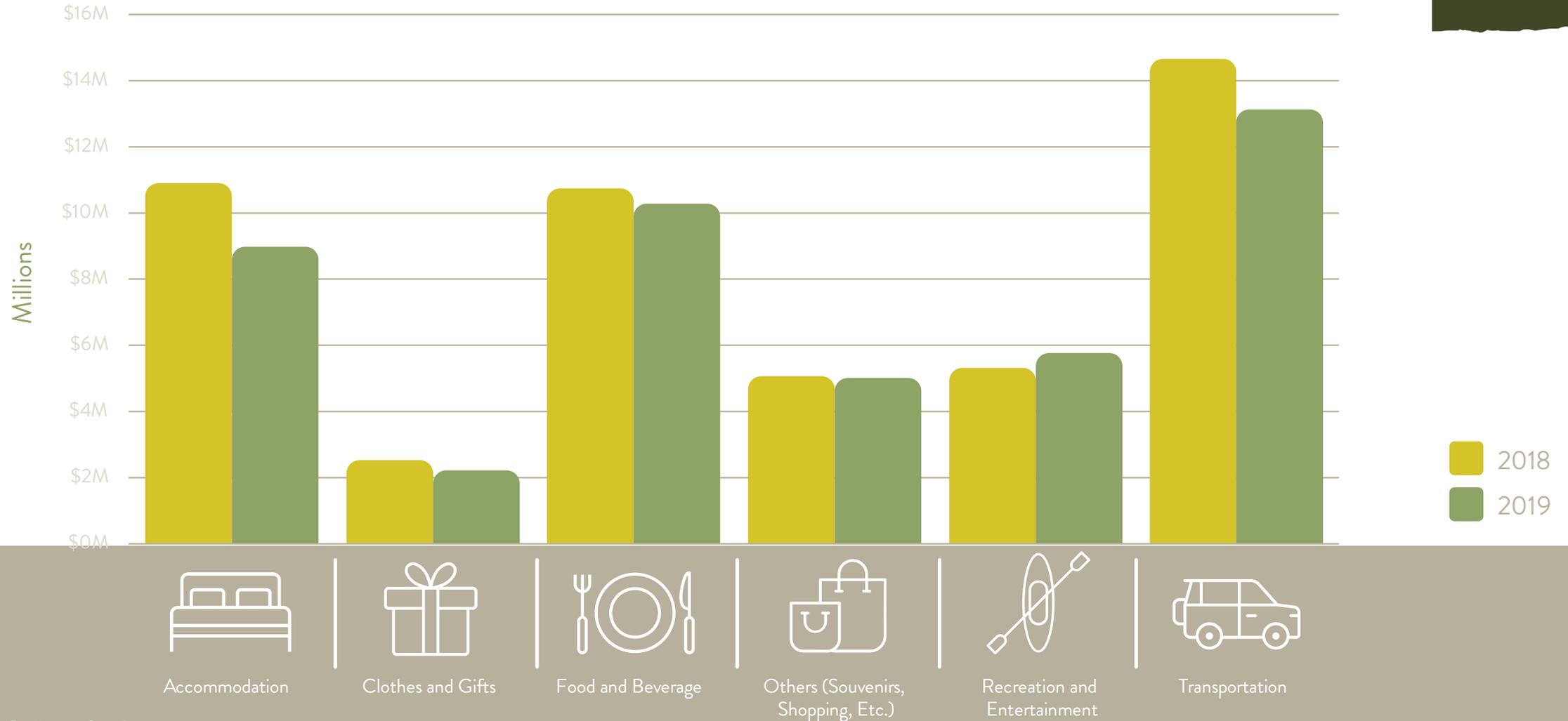
However, in 2020, the number of visitors

↑ **increased from several cities in the Lower Mainland, along with Kelowna and Edmonton**

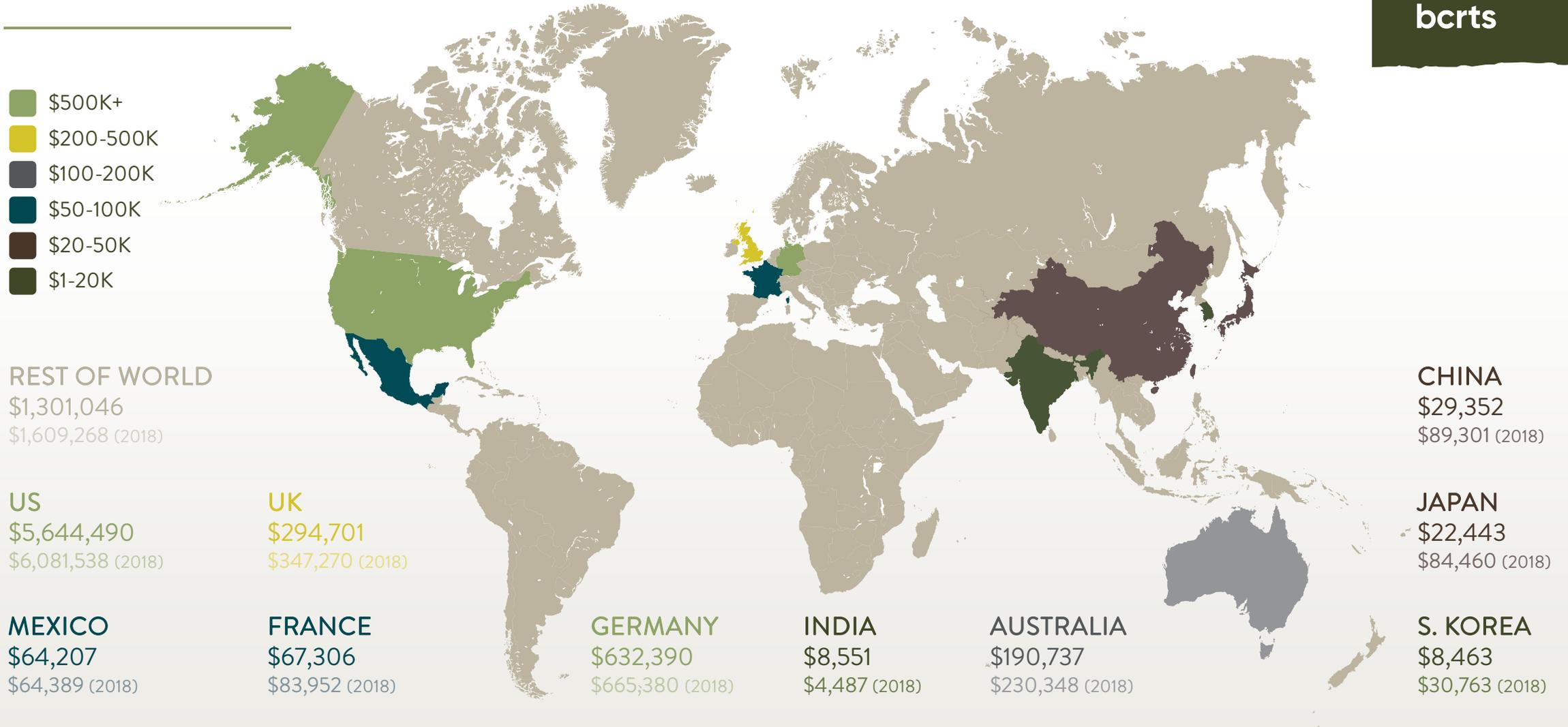
Comparing the first 3 quarters, 2021 city visitors are down from previous years. It could be that road closures and other complications due to wildfires led to a lower volume of visitors from the Lower Mainland.

NOTE: Data collected for 2021 is from Jan - Sept.

Visitor Spending in CCC from International and Domestic Travellers



2019 Top Visitor Origin by Spending *-International*



2019 Top Visitor Origin by Spending -US



ALASKA
\$136,426
\$155,134 (2018)

WASHINGTON
\$1,180,273
\$1,234,702 (2018)

OREGON
\$222,844
\$237,494 (2018)

CALIFORNIA
\$1,074,867
\$1,162,599 (2018)

ARIZONA
\$142,097
\$141,897 (2018)

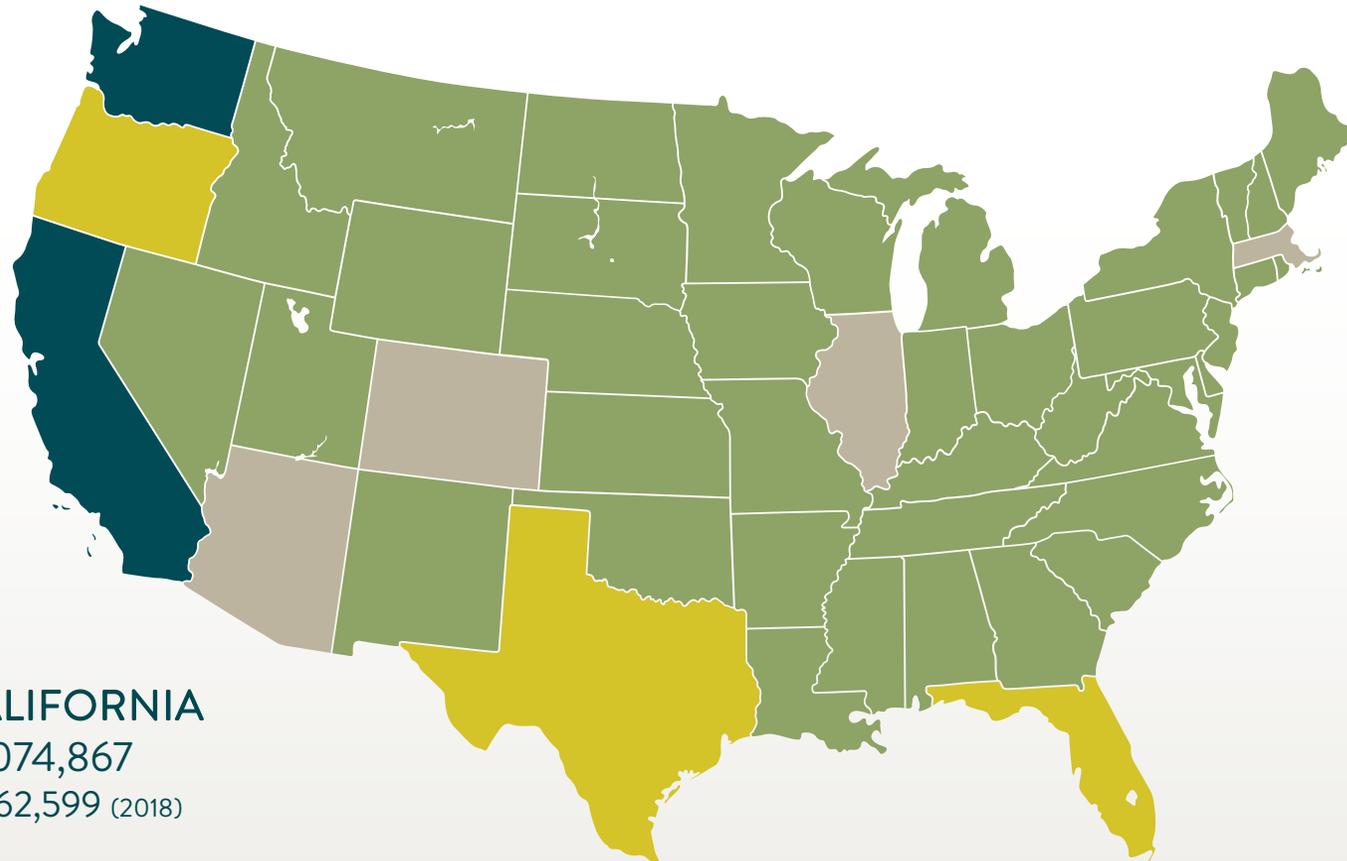
COLORADO
\$159,806
\$188,348 (2018)

TEXAS
\$387,894
\$428,018 (2018)

ILLINOIS
\$146,479
\$171,926 (2018)

NEW YORK
\$205,087
\$219,001 (2018)

FLORIDA
\$230,308
\$244,098 (2018)



 \$500K+
 \$200-500K
 \$100-200K

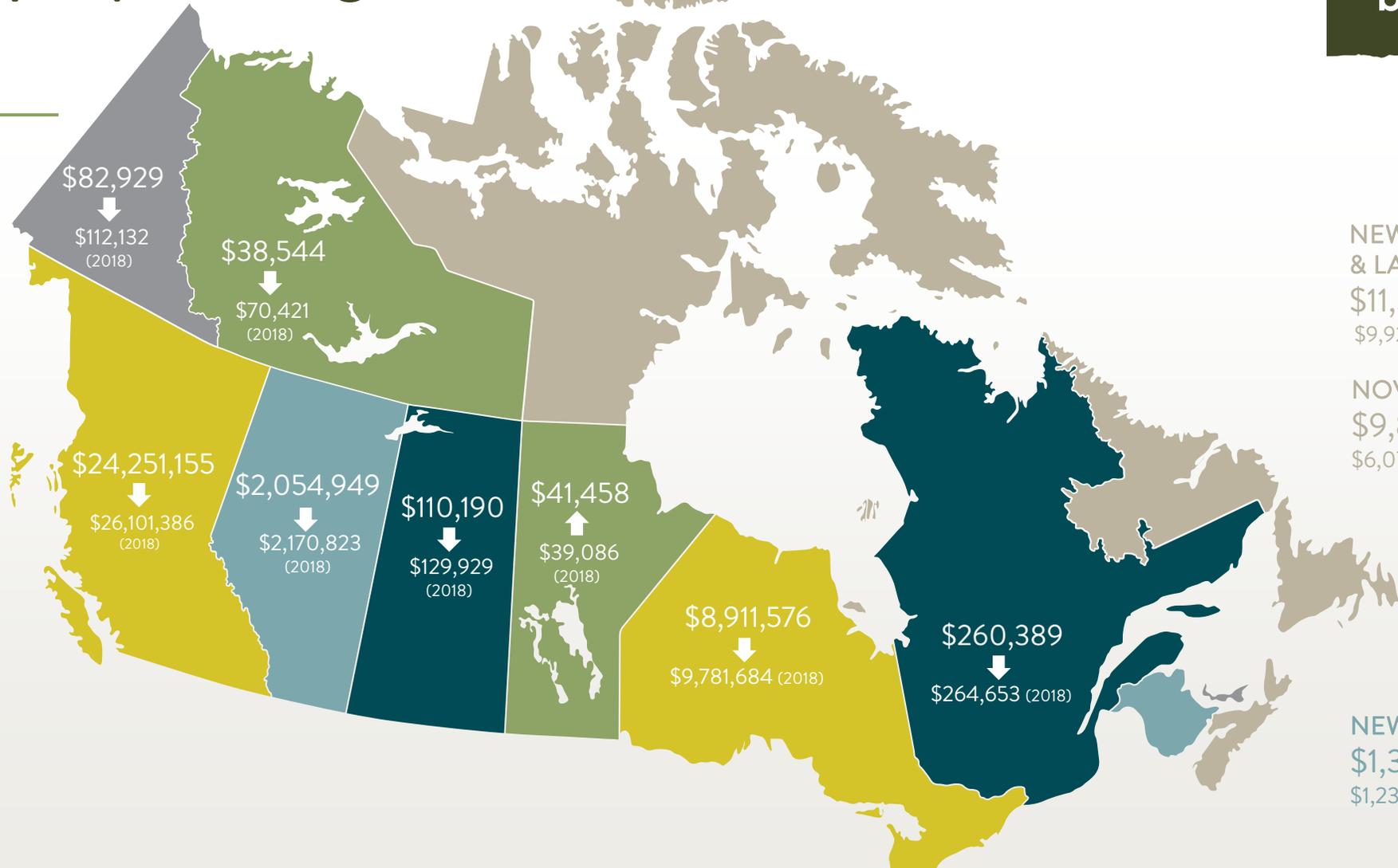
2019 Top Visitor Origin by Spending -Canada

SNAPSHOT
2019 - 2021



bcrts

- \$5M+
- \$1-5M
- \$100-500K
- \$50-100K
- \$20-50K
- \$1-20K



Top PRIZM Market Segments



Country & Western

Average Household Income \$95,438

- Older, middle-income rural westerners
- Occupation: Primary/Blue Collar
- Sample Social Value: Skepticism Towards Advertising
- Post-pandemic are looking forward to travelling within Canada and getting back to old habits



Suburban Sports

Average Household Income \$127,534

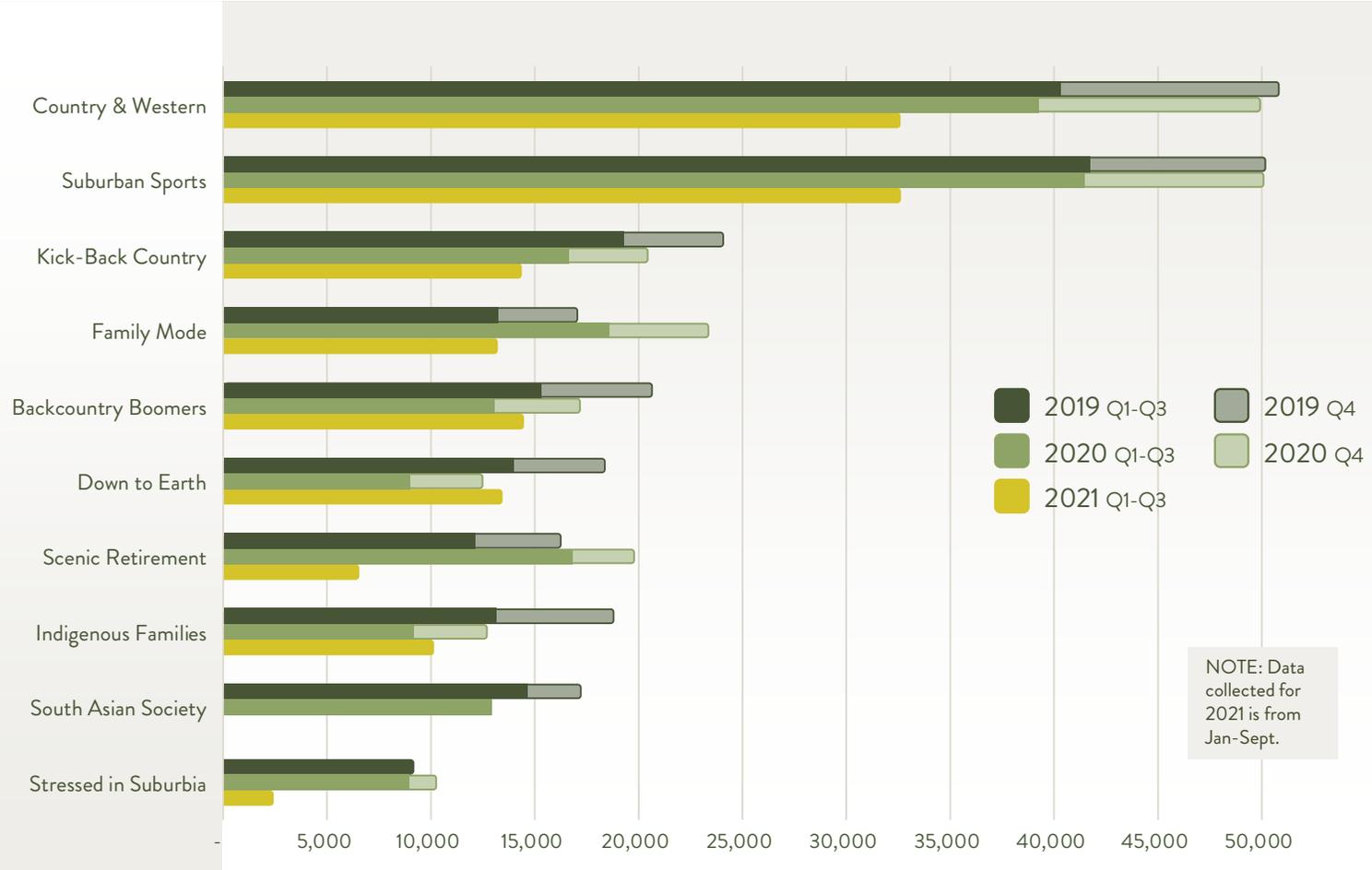
- Upper-middle-income, younger and middle-aged suburbanites
- Occupation: Service Sector/Blue Collar
- Sample Social Value: Rejection of Order
- Post-pandemic are looking forward to travelling within Canada and attending professional sports events/games



Kick-Back Country

Average Household Income \$149,823

- Rural, middle-aged upscale families and couples
- Occupation: Blue Collar
- Sample Social Value: Effort Toward Health
- Post-pandemic are looking forward to attending professional sports events/games and travelling within Canada (higher than the national average)



Top EQ Traveller Types



Rejuvenators

- Middle-aged, lower middle-income and family-oriented
- Travel with others to escape everyday life
- Want their travel experiences to be as comfortable and relaxing as possible, yet carefree and indulging
- Being awestruck by nature holds great appeal in their vacations



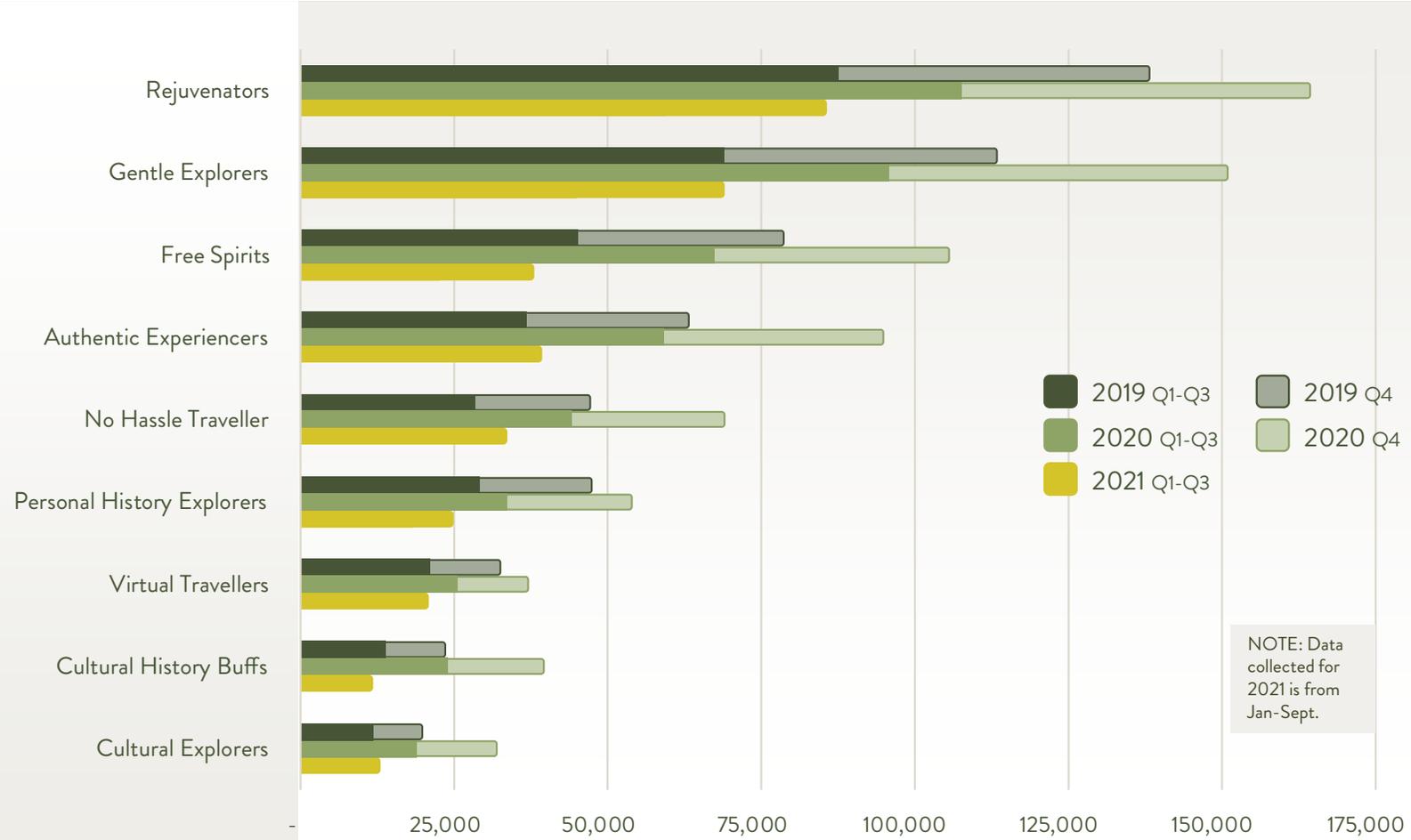
Gentle Explorers

- Like to travel with others and return to past destinations
- Averse to experiencing new locations, food and people
- Demand the very best and most comfortable environments
- Not as enthusiastic about experiencing nature as other travellers



Free Spirits

- Adventurous and like to see all the top attractions (but not in depth)
- Aspire to stay at luxury accommodations and venues
- Vacation is a time to be carefree and indulge
- Attracted to groups where they can socialize and share the experience with others



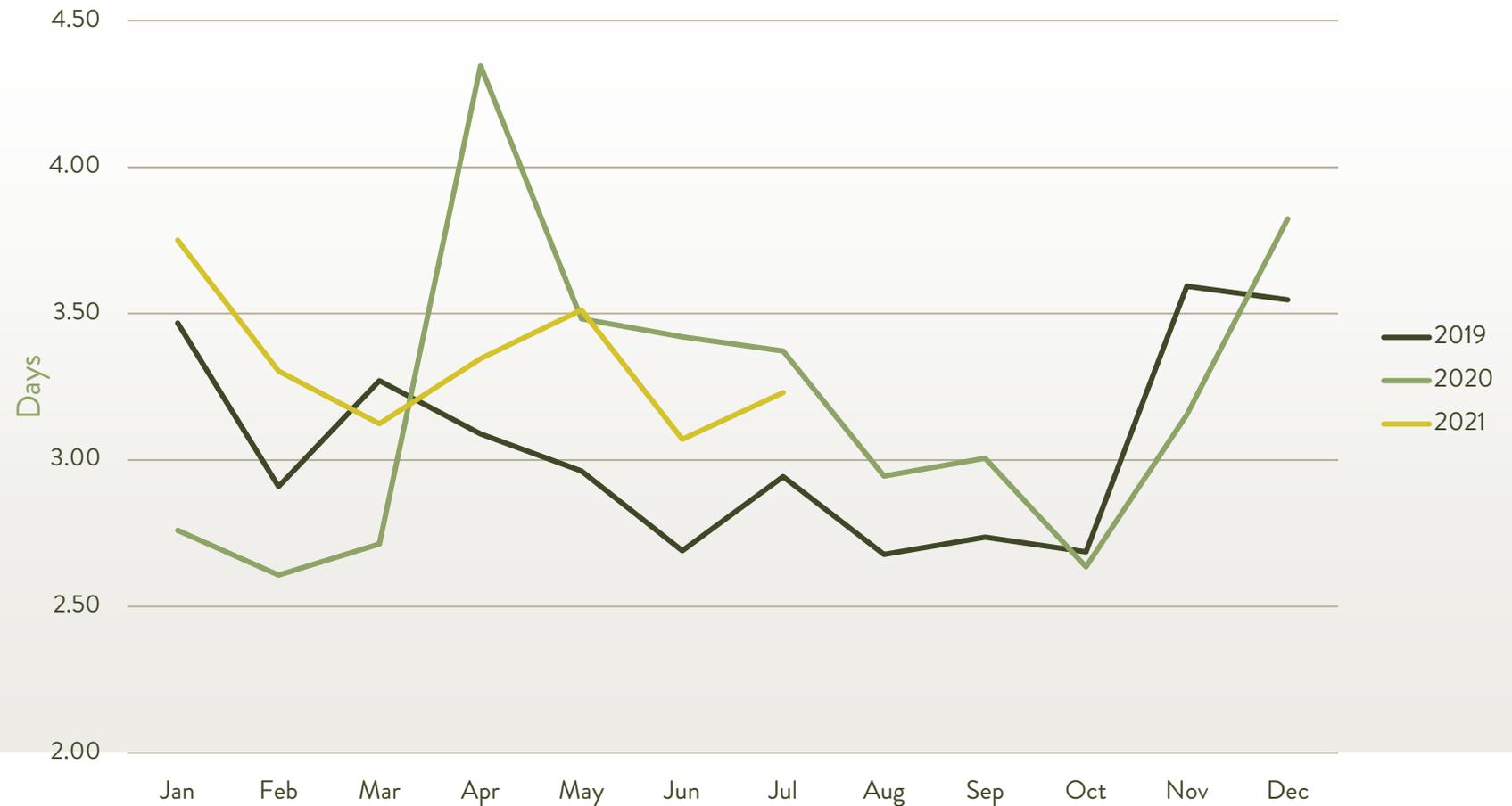
Average Length of Stay

Overall, the **average length of stay for the same reporting period increased in 2021 to 3.33**, compared to 3.25 for 2020 and 3.05 for 2019. Note: this data does not include the two busiest months of the year in July and August.



The average length of stay increased in the summer of 2020 when compared to the same period in 2019, which may be indicative that visitors to the region were more likely to be self-guided non-leisure.

The longest length of stay was 4.35 and occurred in April of 2020.



Occupancy Rate

SNAPSHOT
2019 - 2021

CARIBOO
CHILCOTIN
COAST 

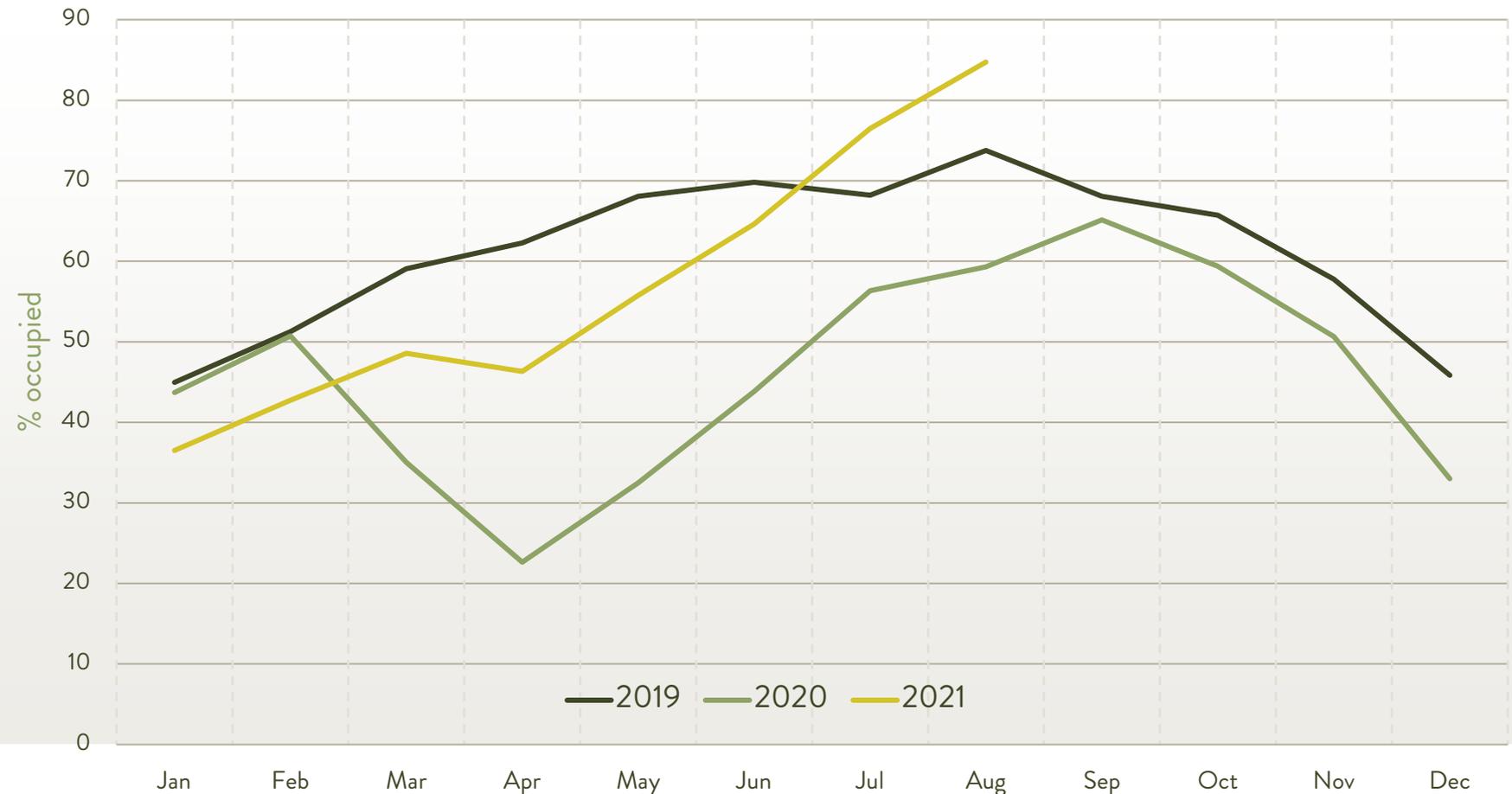
bcrts

From March 2021 onwards,
occupancy rates:

 surpassed 2020 levels
despite lower visitor
volumes and

 surpassed 2019 levels in
both July and August

NOTE: This data is from
predominantly chain hotels in
urban centres and therefore is not
representative of the region.



Source: STR

Average Daily Rate

The average daily rate appears to be moving in response to the reported occupancy rates.

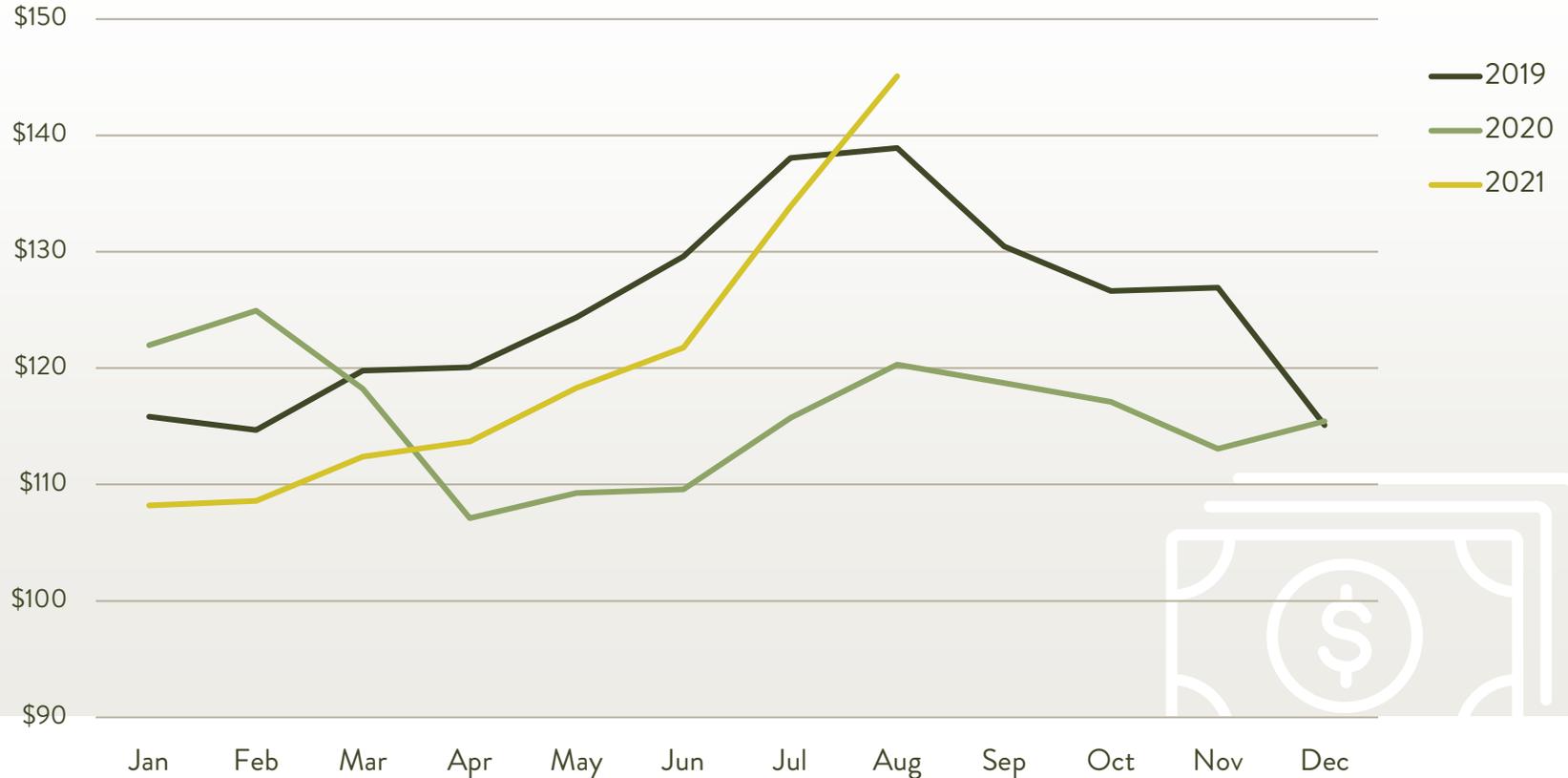
For the first half of 2021, the ADR was consistent with past years but then surpassed 2019 rates in August.

Overall, the average ADR for the same reporting period increased in 2021 to \$120

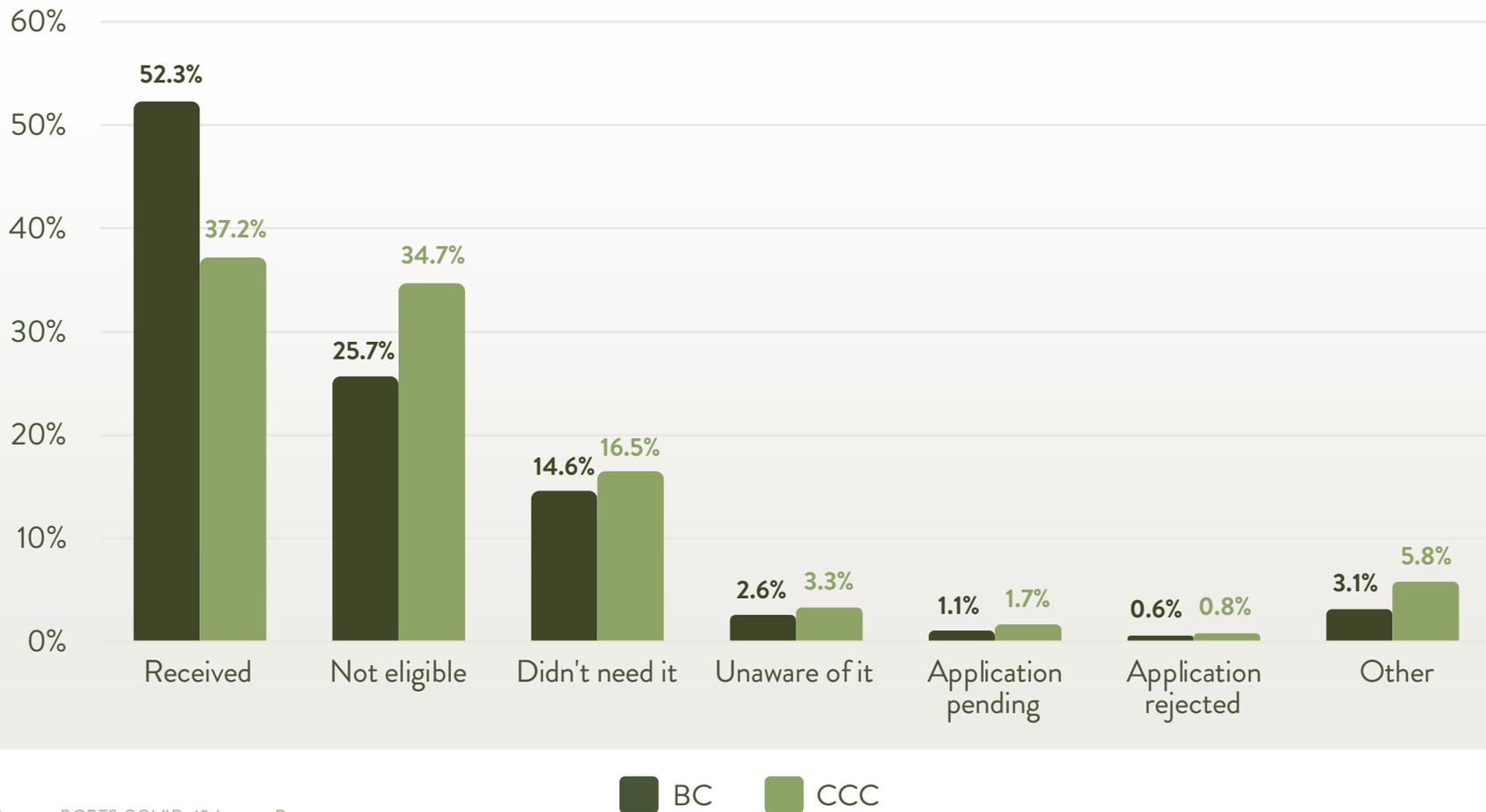
 An increase compared to \$116 for 2020

 A decrease compared to \$125 for 2019

NOTE: This data is from  predominantly chain hotels in urban centres and therefore is not representative of the region.



Government Program Access: CEWS



From November 2020 to August 2021, as compared to firms in BC as a whole, CCC firms were:

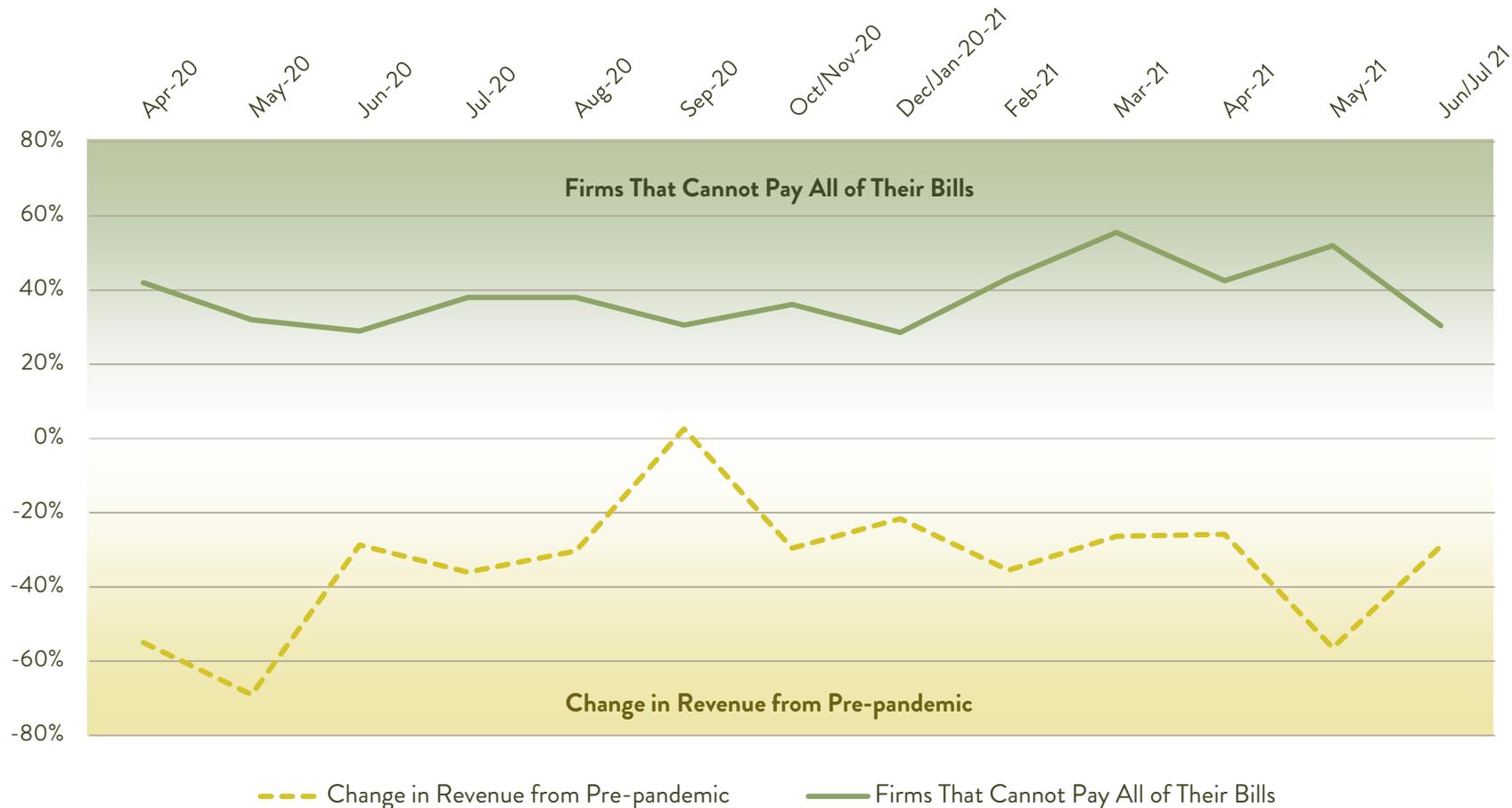
 **less likely** to have received government relief programs

 **more likely** to be ineligible or feel like they didn't need it



Change in Revenue & Ability to Pay Bills

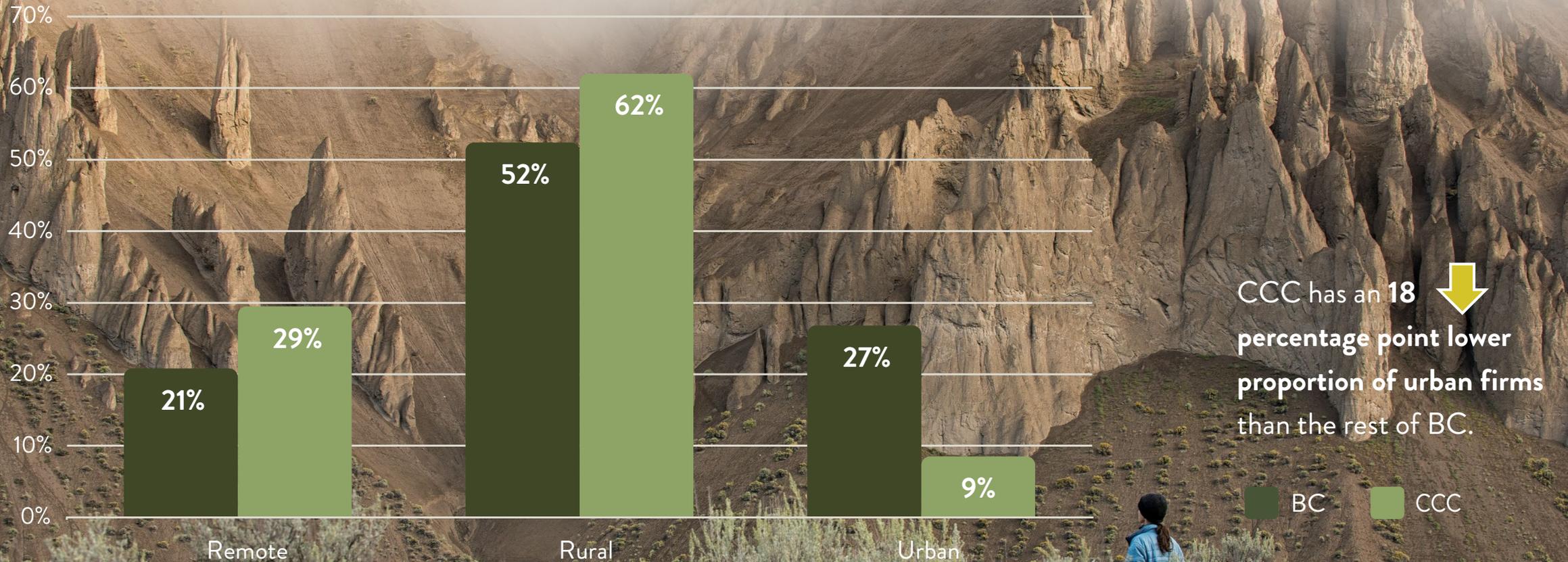
For reference, the region experienced a **26% decrease in visitors** throughout 2021 YTD as compared to 2019.



By September 2021, nearly a third of businesses (30%) reported that they were unable to pay 100% of their bills, this is a decrease from a high of 56% in March 2021.

In September 2021, there was a 29% decrease in revenue. The pandemic low was a 69% decrease in May 2020.

Percentage of Firms by Location



Impact of COVID-19

As of September 2021
26% of firms in CCC were reporting business as usual

 **This is 2% higher than BC firms as a whole**

2021 average: **26%**
2021 high: **38%**
2021 low: **10%**

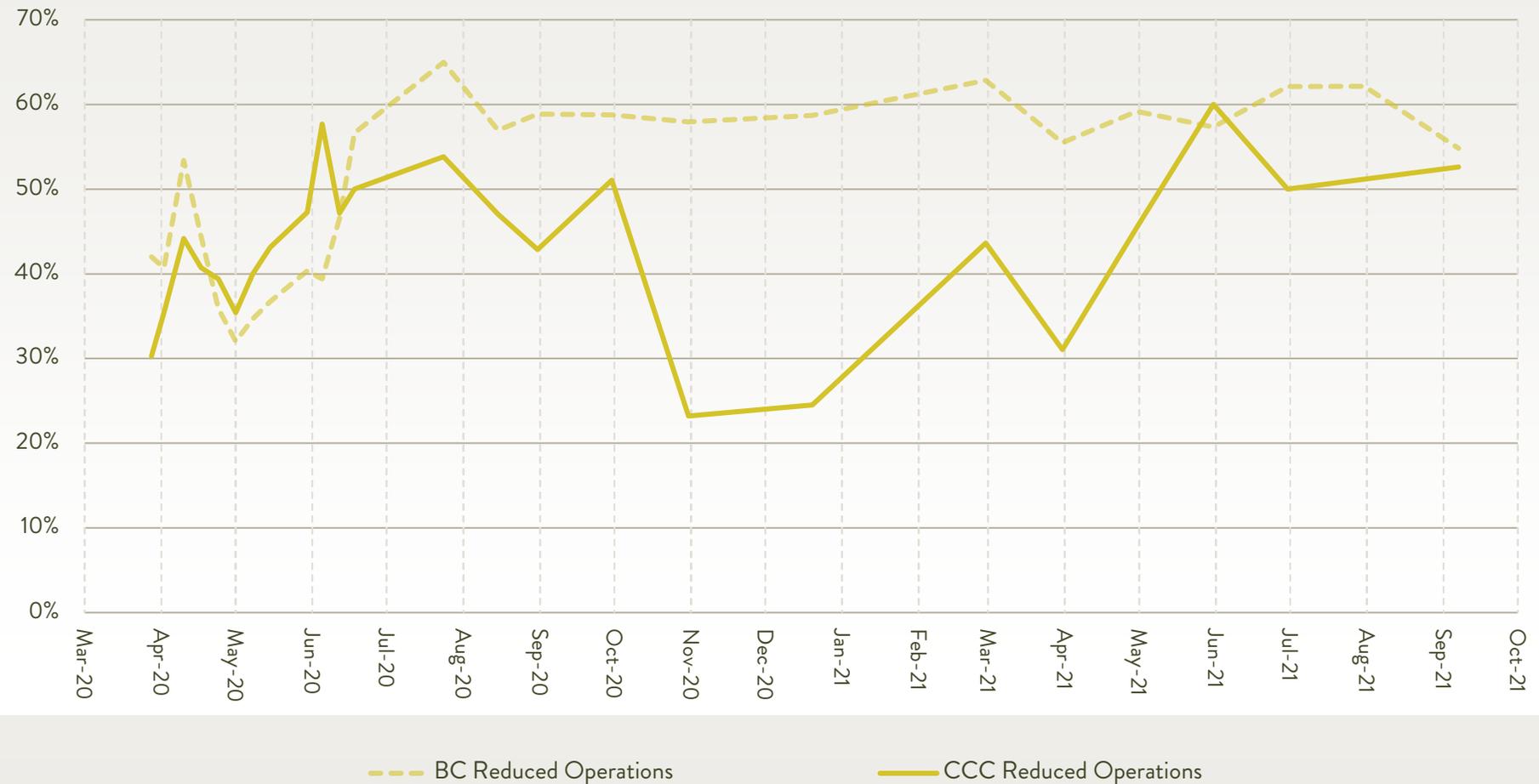


Impact of COVID-19

As of September 2021
53% of firms in CCC
were reporting reduced
operations

 **This is 2% lower
than BC firms as
a whole**

2021 avg: **47%**
2021 high: **60%**
2021 low: **31%**



Impact of COVID-19

As of September 2021 **21%** of firms in CCC reported that they had closed

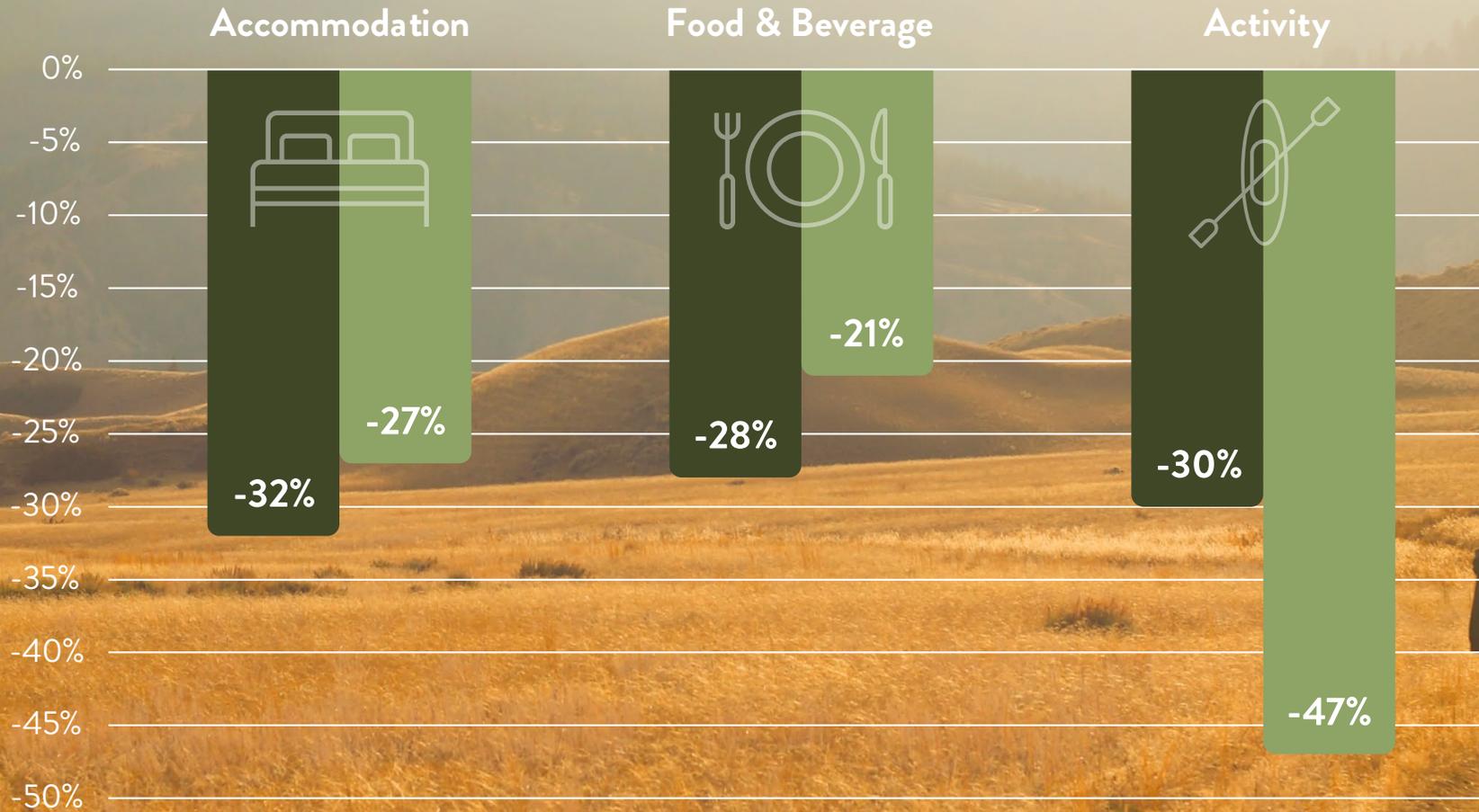
 It is similar to **22%** of other BC firms

 Overall there are fewer businesses reporting that they are closed than any other time during the pandemic

2021 avg: **27%**
2021 high: **31%**
2021 low: **21%**



Decrease in Revenue from Pre-Pandemic

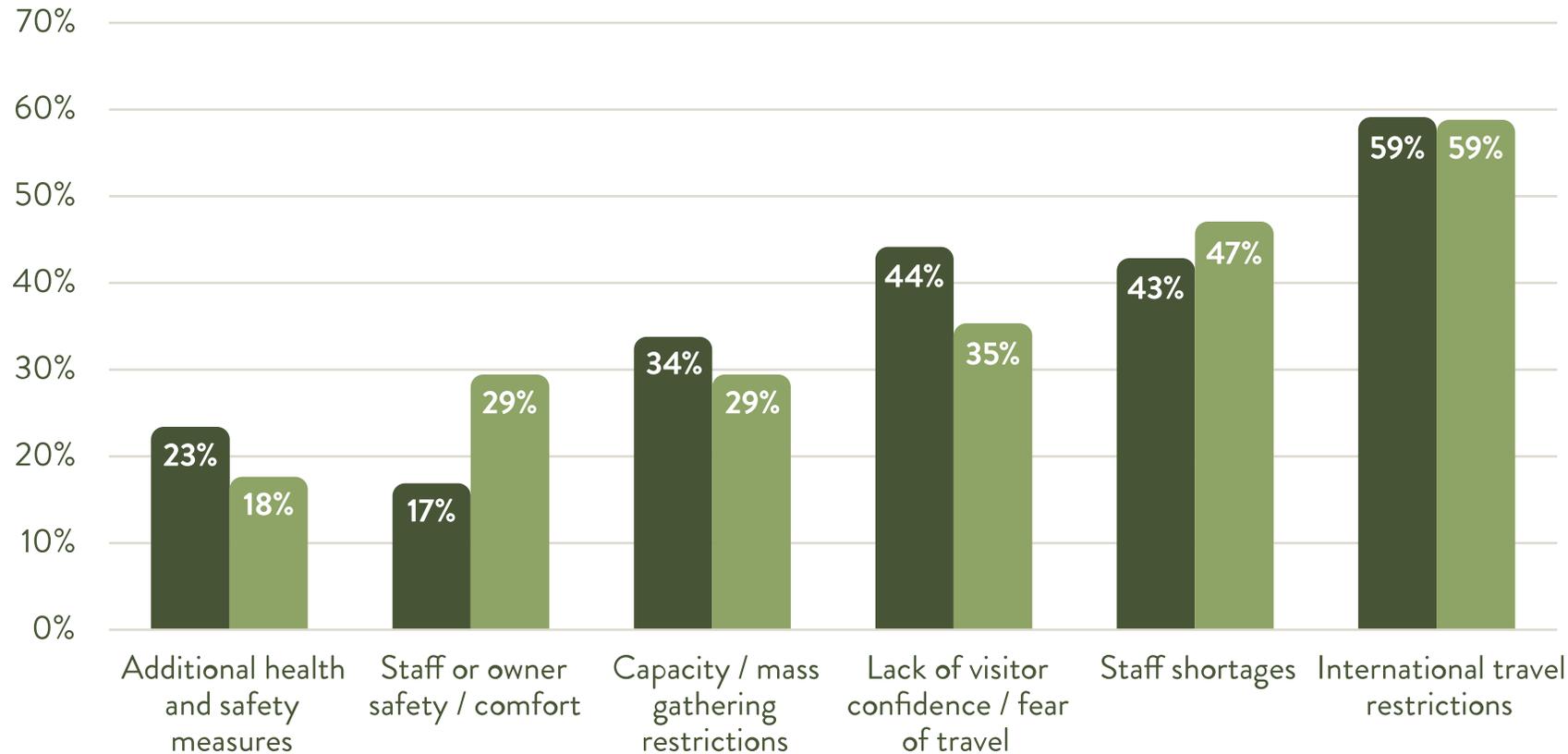


Activity firms suffered the sharpest decline in revenue compared to pre-pandemic years. It could be the case that the lack of international visitors means that there are less visitors engaging in the full spectrum of tourism services. It could also be the case that accommodation firms (as well as food & beverage firms) are supported by non-leisure tourism.

 BC  CCC

Concerns About Recovery

We asked firms during July and August 2021 to share their concerns about re-opening once the industry-wide restrictions were lifted. Similar to other firms in the province, **businesses from CCC were most concerned about international travel restrictions and staff shortages.**



CCC concerns are similar to that of the rest of BC, particularly in regards to international travel restrictions. CCC firms significantly more concerned about lack of visitor confidence and fear of travel compared to the rest of BC.

 BC  CCC

Staffing Capacity

Usual staffing capacity, March-August 2021



Overall, staffing levels have been low compared to pre-pandemic and follow a similar pattern to the province as a whole.

Looking ahead, staffing levels are still low, reflecting industry and province-wide labour shortages coupled with difficulties in hiring for rural positions.