CARIBOO
CHILCOTIN
COAST

5-Year MRDT Strategy
2023 – 2028

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CCCTMA – Marketing Committee & Board of Directors: *November 23, 2021*

Due to the ongoing evolvement of the COVID-19 pandemic, sections of this strategy will be updated before its final submission date of August 1, 2022 with the most current information.

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Forward

As of the initial consultations and draft of this strategy, the COVID-19 pandemic continues to create uncertain conditions for tourism supply and demand recovery in the Cariboo Chilcotin Coast region. The recommendations of this Municipal and Regional District Tax (MRDT) Strategy were developed and validated through engagement sessions with regional stakeholders, key partners, and community groups in various periods throughout 2020-2022. To-date market data and decision variables for sub-regional and regional situation analysis and industry forecasting were limited for the drafting of this strategy; however, the recommendations included contain consistent themes from pre-COVID stakeholder and community consultations.

This process also involved extensive reviews of the Cariboo Chilcotin Coast Tourism Association's (CCCTA) and Cariboo Chilcotin Coast Tourism Marketing Association's (CCCTMA) past Five Year MRDT Strategy. These reviews examined successful programs and activities; and areas that were affected by or gained greater importance during and into recovery from COVID-19.

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Executive Summary

The Cariboo Chilcotin Coast Tourism Association (CCCTA) has benefited in pursuing its primary marketing goals, under the stewardship of the Cariboo Chilcotin Coast Tourism Marketing Association (CCCTMA), in adherence to the direction and goals outlined in the initial 2018 – 2022 MRDT Strategy. The region, much like the Province of BC, was on track for increased tourism visitation and growth prior to COVID-19.

Key themes of the previous plan were to increase the recognition and favourability of the region as a travel destination to its core markets through various brand development and marketing initiatives. The installation of regional MRDT collection sought to address a major barrier to this growth which was a disparity in the access to and awards of funding for development and marketing. This exponential increase in visibility has led to an inevitable need to solidify direction in strengthening the regional brand positioning and future development sustainability. Proof-of-concept has also increased interest in replicating successful marketing leveraging and return-on-investment measures at the individual stakeholder level.

The direction of this strategy is to proceed with the original pre-COVID-19 path in building off of the overall positive feedback and results since the beginning of MRDT-funded initiatives in 2018; as well as recognizing where the effects of COVID-19 will create or inhibit certain market opportunities and disruptions.

Background

Significant effort and funds have been invested in building the presence of the Cariboo Chilcotin Coast since 2018, resulting in positive linear growth in regional visitation and marketing effectiveness. However, the Cariboo Chilcotin Coast remains the least funded of its neighboring regions and operates in an environment where its key product and experience draws can also simultaneously be its barriers towards further growth. This theme was a major contrast highlighted during consultations in respect to the favourable remoteness of the region versus the difficulties of rural transportation and infrastructure.

This contrast creates the need for a delicate balance of expanding capacity for tourism revenues without negatively impacting environmental, community and culturally sensitive areas of the region. Businesses are both optimistic and hesitant in realizing the near-future can solidify growth of the region through its natural product offerings aligning with post-pandemic travel trends in a short-haul domestic market. Focusing on sustainability in domestic markets was crucial for many businesses throughout and post-COVID-19; however, high-yield longer-stay international markets remain a recognized tool for managing stakeholder and community capacity.

CCCTMA Governance

Governance

The Cariboo Chilcotin Coast Tourism Marketing Association (CCCTMA) is a not-for-profit destination marketing organization governed by a Board of Directors. It is the eligible entity for the Cariboo Chilcotin Coast region for the Municipal & Regional District Tax (MRDT) in the Province of British Columbia. CCCTMA works in conjunction and alignment with the Cariboo Chilcotin Coast Tourism Association (CCCTA) as the region's Destination Management Organization (RDMO). The intent of the CCCTMA is to build on the progressive initiatives that the CCCTA undertakes via its industry leading programming to build capacity of tourism businesses and expand product across the region. The Cariboo Chilcotin Coast Tourism Association is managed by a Board of Directors and a board hired Chief Executive Officer (CEO) who is responsible for the daily operations of the organizations.

As the eligible entity, the CCCTMA is a separate business unit as governed by an elected Board of Directors and a separately focused MRDT Marketing Committee. All recording and reporting of activities are separate from the CCCTA. To clearly delineate activities, CCCTA is focused on destination development for the region, while the CCCTMA is directly tasked with destination marketing and any supporting, permissible initiatives to further this activity for the region.

Management

The management of the Cariboo Chilcotin Coast Tourism Marketing Association is carried out by the Director of Marketing. This position leads a team in regional marketing efforts, research and business insights and reporting of value attained and initiatives executed. A key aspect of this position is to work with the CCCTMA – Marketing Committee as they provide guidance into the development of the MRDT annual plans, programs and marketing initiatives. Initiatives are executed in accordance with the approvals gained by the Marketing Committee, as aligned with current market trends, research, and complements Destination BC's marketing direction and cooperative marketing investments in the region.

Operations

Under the operational leadership of the Director of Marketing as guided by the MRDT representative Marketing Committee, staff serve to execute on the annual tactical plan for the region. Four primary components summarize a full list of tactical priorities which are progressively executed on:

- Marketing & Measurable Return,
- Remarkable Experiences,

- Tourism Management,
- Destination & Industry Development.

Environmental Analysis

Regional Snapshot

Regional Breakdown

Figure 1: CCCTA Regional Statistics

Cariboo Chilcotin Coast	2015	% change (2014-15)
Population[1]	65,491	-1%
Population as % of BC	1%	-0.03 points
Unemployment rate[1]	7%	+2 points

Age groups[1]	2015	% change (2014-15)
0-19 years	21%	-2%
20-44 years	26%	-4%
45-64 years	32%	-1%
65+ years	20%	4%

Tourism industry	2015	% of BC
Businesses[1]	291	2%
Employment[1]	1,900	1%
Campsites		
Private/municipal[2]	1,912	7%
Provincial/National[2]	559	5%
Customs entries[3]	-	0%
Visitor centre parties[2]	45,136	4%

Transportation	2016	% change (2015-16)
BC Ferries Passengers[4]		
Route 10 departing Bella Coola	1,376	7%
Highway traffic volume (000s)[5]		
Route 97	1,127	3%

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017.

Figure 2: Top Twenty CCC Markets

TOP 20 MARKETS IN CARIBOO - 2018/2019

2018 Top Markets

1. Prince George (**$7,883,600**)
2. Thompson-Nicola (**$4,867,700**)
3. Greater Toronto Area (**$4,222,800**)
4. Greater Vancouver (**$4,062,200**)
5. Northern BC Rural (**$1,536,600**)
6. Capital (**$1,330,700**)
7. Fraser Valley (**$1,247,300**)
8. Washington (**$1,234,700**)
9. California (**$1,162,600**)
10. North Coast (**$1,000,700**)

11.-17. Central Okanagan, North Okanagan, Germany, Alberta North, Edmonton & Area, Alberta Central, Texas

Note: Rest of World is #6. Not included are Hamilton #2 and Fundy #11 due to suspected errors being investigated by DC.

2019 Top Markets

1. Prince George (**$7,595,200**)
2. Thompson-Nicola (**$4,312,800**)
3. Greater Toronto Area (**$3,897,700**)
4. Greater Vancouver (**$3,674,900**)
5. Northern BC Rural (**$1,467,800**)
6. Washington (**$1,180,300**)
7. Capital (**$1,150,400**)
8. North Coast (**$1,140,000**)
9. Fraser Valley (**$1,103,400**)
10. California (**$1,074,900**)

11.-17. Central Okanagan, North Okanagan, Alberta North, Germany, Edmonton & Area, York/Durham, Calgary & Area

Note: Rest of World is #8. Not included are Hamilton #2 and Fundy #7 due to suspected errors being investigated by DC.

Source: Symphony Tourism Services, Visitor Intelligence Platform – Tourism Estimated Spend Insights for Cariboo Chilcotin Coast 2018/2019

The BC market comprises 4 of the top five sources markets by spend to the Cariboo. While sizable spend across 2018 and 2019 has materialized from the Greater Toronto Area plus both Washington and California was respectable from the USA market. The Cariboo had Alberta (North, Edmonton & Calgary) and Germany were part of the top 20 markets by spend.

CCCTA Visitor Analysis

Figure 3: CCCT Regional Visitor Analysis

Primary accommodation*	BC residents	Other Canadians **	US residents **	Other inter-national**
Friends and family	36%	27%	17%	5%
Hotel	10%	5%	5%	37%
Motel	2%	8%	15%	6%
Other commercial fixed roof***	5%	8%	6%	15%
Camping / RV parks	17%	13%	19%	25%

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017

Figure 4: Regional Trip Activities

TRIP ACTIVITIES

Overnight travellers who spent one or more nights in the Cariboo Chilcotin Coast took part in a number of outdoor activities during their trip*, including boating, wildlife viewing, visiting national/provincial parks, fishing, boating, and camping. Some cultural activities, including visiting historic sites and museums/art galleries, also ranked as top trip activities among non-British Columbia residents.

	BC residents	Other Canadians**	US residents***	Other international***
1	Boating	Downhill skiing or snowboarding	National/provincial or nature park	National/provincial or nature park
2	Beach	Fishing	Wildlife viewing or bird watching	Historic site
3	Wildlife viewing or bird watching	Theme or amusement park	Historic site	Wildlife viewing or bird watching
4	Fishing	Boating	Museum or art gallery	Museum or art gallery
5	Camping	Hiking or backpacking	Hiking or backpacking	Hiking or backpacking

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017

Outdoor activities are a large draw for the CCC region and the variety of activities available align well with the natural offerings of the sub-regional destinations. Continued development of regional infrastructure and individual product offerings to improve accessibility and sustainability will be essential for modernization and competitiveness of these destinations.

Figure 5: CCCTA Overnight Visitor Dispersion

	Total			% change (2013-2014)			Share of total		
	Overnight visitors (000s)	Spending ($000s)	Nights (000s)	Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
*All travellers in the Cariboo Chilcotin Coast	528	$169,715	1,719	19%	24%	2%	100%	100%	100%
BC residents	384	$104,185	1,359	25%	30%	22%	73%	61%	79%
Other Canadian residents**	62	$14,679	170	-34%	-47%	-51%	12%	9%	10%
US residents**	53	$36,976	124	136%	135%	65%	10%	22%	7%
Other international residents**	30	$13,876	66	35%	5%	-53%	6%	8%	4%

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017

Overnight visitor dispersion shows a decline in non-BC domestic travellers and substantial increases in the U.S. resident market. While the number of nights spent by non-U.S. overseas travellers has decreased, increases in overnight visitors and spending show the market is still driving higher-yield despite shorter stays. This could be a result of increased travel trade operations for group and tour travel.

Figure 6: CCCTA Seasonal Visitation

Season of travel	BC residents	Other Canadians*	US residents*	Other inter-national*
January to March	15%	27%	0%	1%
April to June	22%	14%	45%	36%
July to September	54%	53%	51%	57%
October to December	9%	5%	4%	5%

**Due to small unweighted sample size, please use extreme caution when interpreting.*

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017

Typical peak season visitation is consistent for all target markets as concentrated throughout the April ~ September period. Diversification into the shoulder season is limited due to weather and road conditions as perceived barriers for drive-markets, along with decreased airline and ferry schedules. As regional infrastructure, transportation maintenance and availability improve, there is a more immediate opportunity for existing businesses to expand their seasonal offerings for promotion versus the longer-term creation of new product.

Figure 7: CCC Overall # of Accommodation Properties 2018-2021

Fiscal	# Properties
2018-19	141
2019-20	151
2020-2021	157
2021	*To be inserted prior to application submission*

Source: Internal Estimates from Monthly MRDT Remittances through the Ministry of Finance

Figure 8: CCC Overall Regional Room Revenues

Annual - Room Revenues in $000

Region	2018	2019	2020	2021
Vancouver Coast and Mountains	$ 1,725,737	$ 2,060,122	$ 710,787	*TBA*
Thompson Okanagan Tourism Assn	$ 312,469	$ 370,062	$ 246,310	*TBA*
Chilcotin Cariboo Coast Tourism Assn	$ 19,585	$ 27,231	$ 2,085	*TBA*
Tourism Assn of Vancouver Island	$ 439,785	$ 509,338	$ 274,548	*TBA*
Kootenays Rockies Tourism Assn	$ 152,907	$ 189,406	$ 132,998	*TBA*
Northern BC Tourism Assn	$ 52,113	$ 69,077	$ 54,166	*TBA*

Source: DBC Research Services; BC Stats room revenue data http://bcstats.gov.bc.ca/StatisticsBySubject/BusinessIndustry/Tourism.aspx

The latest hotel occupancy data comparing Average Daily Rate (ADR) during a peak week in June for larger tourism destinations shows an increase in 2021 over 2020. However, these figures have not yet recovered to pre-pandemic occupancies. Similar results are reflected in occupancy rates.

Figure 9: Annual Accommodation Data for CCC Region (Figures & % Change YoY)

Year	**Average Annual ADR**	**Average Annual Occupancy**	**Average Annual RevPar**
2018	$115.73	57.00%	$51.25
% Change 2018 to 2019	**8.04%**	**7.46%**	**50.63%**
2019	$125.03	61.25%	$77.20
% Change 2019 to 2020	**-7.25%**	**-24.90%**	**-30.41%**
2020	$115.96	46.00%	$53.72
% Change 2020 to 2021	*TBA*	*TBA*	*TBA*
2021 (to June 2021)	$114.14	48.95%	$56.27

Source: STR/NCHA BCRTS Destination Year to Date – 2019 - 2021

International Visitor Trend

The high-yield, longer-stay international market remains crucial to supporting many operators and travel infrastructure throughout the CCC. Restrictions on incoming international travellers to Canada during the pandemic have been very devastating to the tourism industry and forced many to decrease or close their operations awaiting a border re-opening. As anticipated with the domestic market, the wide-open spaces of the CCC region are expected to be an increased draw for the post-C19 international traveller.

The CCCTMA re-entered the western United States market upon the opening of the U.S.-Canada border for American travellers on August 7, 2021. Dedicated campaign re-entry to the German-speaking Europe market is planned for winter 2021-22 with the monitoring of positive market indicators shared by Destination BC and Destination Canada.

Figure 10: 2019 Canadian Tourism Expenditures

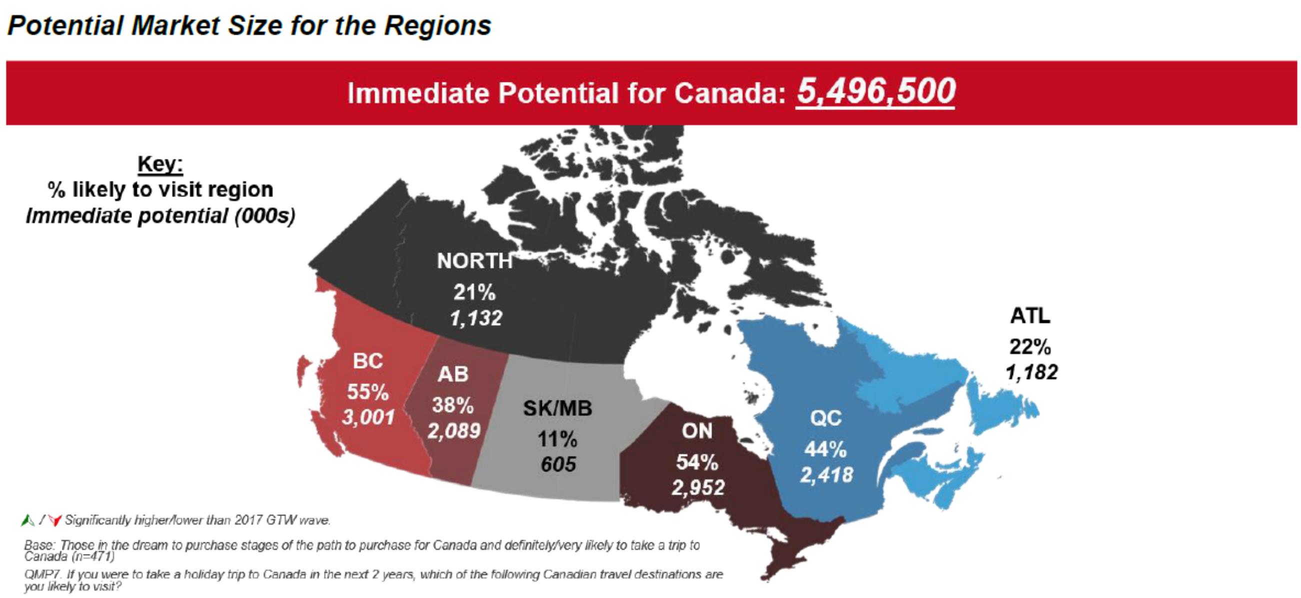
Total visitors to Canada 2019	Total visitors to Canada		Same-day visitors		Overnight visitors		
	Trips in Canada (000s)	Expenditures while travelling in Canada ($000s)	Trips in Canada (000s)	Expenditures while travelling in Canada ($000s)	Trips in Canada (000s)	Expenditures while travelling in Canada ($000s)	Nights (000s)
Domestic + international trips to Canada	**308,705**	**$68,356,652**	**192,126**	**$15,224,379**	**116,579**	**$53,132,273**	**470,915**
Domestic trips	275,370	$45,756,840	181,730	$14,584,348	93,640	$31,172,492	262,699
Domestic province-visits[1]	**284,630**	**$45,756,840**	**182,004**	**$14,584,348**	**102,626**	**$31,172,492**	**262,699**
Intra-provincial visits	251,949	$33,202,010	174,180	$13,500,422	77,769	$19,701,588	177,948
Inter-provincial visits	32,681	$12,554,830	7,824	$1,083,926	24,857	$11,470,904	84,751
International arrivals	**32,441**	**$22,599,812**	**10,396**	**$640,031**	**22,045**	**$21,959,781**	**208,216**
US residents	24,986	$11,274,963	10,009	$620,882	14,977	$10,654,081	75,085
Residents from other countries	7,455	$11,324,849	387	$19,149	7,068	$11,305,700	133,131

1- Visits to one or more provinces may take place during a trip away from a traveller's usual home environment. For this reason, the addition of intra-provincial and inter-provincial visits typically exceeds the number of trips taken by travellers away from home.

Sources: Statistics Canada – Visitor Travel Survey (2019, preliminary); Domestic from National Travel Survey (2019; preliminary release)

This above graph displays the total 2019 trips and expenditures in Canada as a barometer to full industry recovery. This graph also depicts the difference in spend between the domestic and international traveller, which will reach full recovery at different intervals dependent on travel restrictions.

Figure 11: BC Share of the German Market



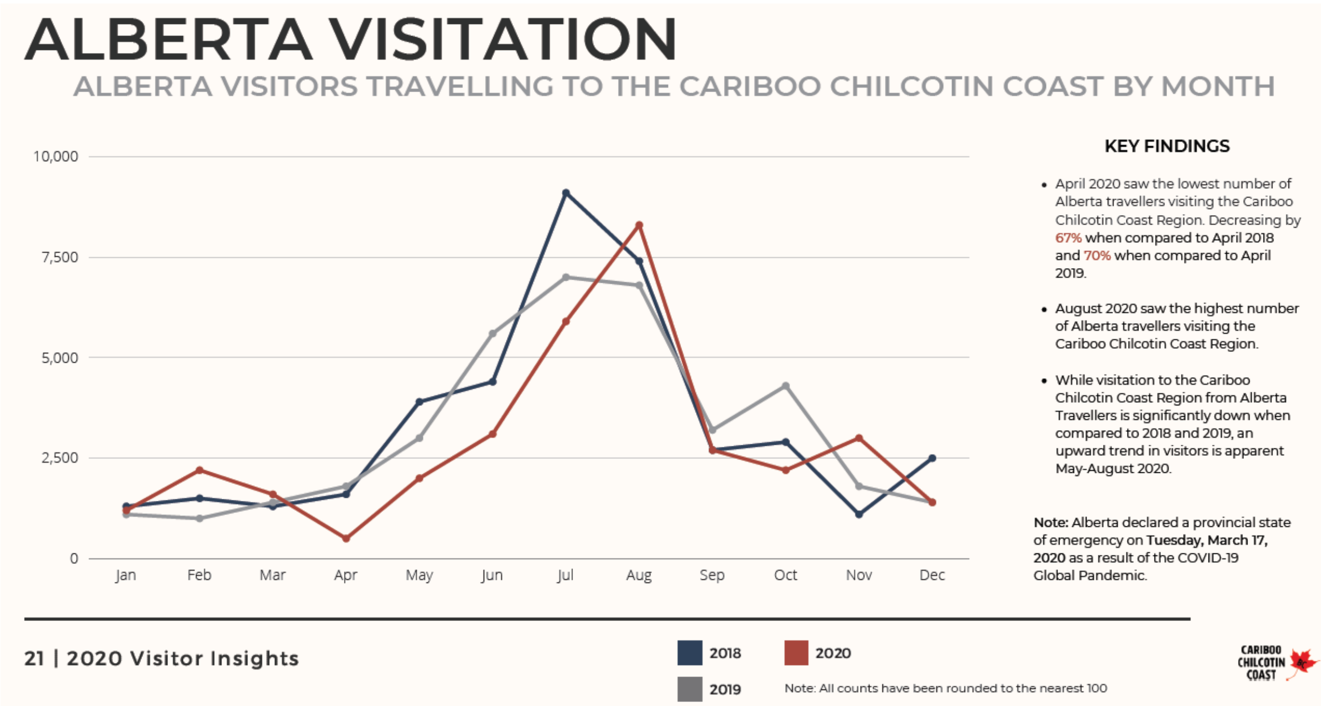
Source: DC Research, May 2021 Forecast…. https://www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Germany has been identified as a key international market for the Cariboo Chilcotin Coast region according to top market and stakeholder feedback data. In 2019, estimates had 55% of surveyed Germans listing British Columbia as the most popular choice for a most-likely travel destination within Canada. The Cariboo Chilcotin Coast is also the only BC tourism region that has Germany within its top five target markets (Figure 2).

Domestic Visitor Trend

The domestic visitor trend aids in displaying how the regions of BC are positioned in various key visitation indicators. The value of the domestic market was increased during the pandemic when there was limited travel permitted throughout 2020 and various periods throughout 2021. Maintaining and strengthening appeal to the domestic market will be important in contingency planning for any future international travel disruptions.

Figure 12: Alberta Tourism to the Region



Source: BCRTS Regional Research Program, Oct 2020

Further targeting of the Albertan market is warranted given more recent increases in visitation, however, is limited by the lack of large-scale airports and flight availability in-region. There is high alignment between travel desires of the Albertan market and the experiences offered in the region. Targeting a driving market from Alberta can work to mitigate the lack of large-scale air access as well as aim to increase length of stay and revenues.

BC Market

Figure 13: Provincial Regional Breakdown

Travel characteristics by region	Total			% change (2013-2014)			Regional share of total		
	Overnight visitors (000s)*	Spending ($000s)	Nights (000s)	Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
All travellers in BC	18,944	$9,221,492	84,961	1%	2%	5%			
Cariboo Chilcotin Coast	528	$169,715	1,719	19%	24%	2%	3%	2%	2%
Kootenay Rockies	2,070	$654,286	6,700	-3%	-10%	-8%	11%	7%	8%
Northern BC	936	$412,398	4,105	3%	6%	21%	5%	4%	5%
Thompson Okanagan	3,721	$1,405,721	13,430	-1%	-2%	-3%	20%	15%	16%
Vancouver, Coast & Mountains	9,225	$4,812,306	43,179	3%	4%	9%	49%	52%	51%
Vancouver Island	4,430	$1,767,065	15,828	8%	6%	13%	23%	19%	19%

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, May 2017

The most recent data shows the CCC region as displaying the largest increase in overnight visitors and spending among all of the regions. This data also recognizes the large room for growth for the region to explore in the BC market, especially in the short term as outbound travel conversion is highest.

Figure 14: BC Traveller Origin

ORIGIN OF BC TRAVELLERS

TOP ORIGIN CITIES OF THOSE TRAVELLING TO THE CARIBOO CHILCOTIN COAST FROM BC BY YEAR

City	2018 Visitor Count	City	2019 Visitor Count	City	2020 Visitor Count
Surrey	20,600	Prince George	21,800	Prince George	17,800
Prince George	20,200	Surrey	19,800	Surrey	17,400
Vancouver	15,400	Vancouver	16,200	Vancouver	16,900
Kamloops	15,000	Kamloops	16,200	Kamloops	14,200
Abbotsford	10,600	Abbotsford	12,500	Abbotsford	11,400
Chilliwack	8,100	Chilliwack	9,100	Kelowna	7,700
Langley	7,500	Kelowna	7,900	Chilliwack	7,600
Kelowna	7,200	Langley	7,500	Langley	7,200
Maple Ridge	5,700	Burnaby	6,100	Burnaby	6,100
Burnaby	5,400	Richmond	5,600	Richmond	5,900

14 | 2020 Visitor Insights

2018 2020 2019 Note: All counts have been rounded to the nearest 100

CARIBOO CHILCOTIN COAST

Source: BCRTS Regional Research Program, Oct 2020

Bringing together travel propensity, source markets and travel seasons for BC residents provides a solid current market perspective. Further honing of available data through Environics Analytics provides Explorer Quotient (EQ) and Prizm profiles of these visitation markets. This data is also being used for hyper-targeting by geographical location (Appendix 1).

The current top Prizm visitor profiles and the associated EQ Types for the Cariboo Chilcotin Coast from 2018-20 are:

1) Suburban Sport *(EQ Type: Gentle Explorer)*
2) Country & Western *(EQ Type: Rejuvenator)*
3) Scenic Retirement *(EQ Type: Rejuvenator)*
4) Family Mode *(EQ Type: No Hassle Traveller)*
5) Back Country Boomers *(EQ Type: Virtual Traveller)*

There is an opportunity to explore additional markets that have potential to be a mid-term and future fit for the region, value sustainability and are of a higher economic value while still maintaining the current visitor profile. Making use of the Prizm profiles and associated EQ Types, the CCC has opportunity to explore and validate the following profiles:

1) A segment of Asian Achievement *(EQ Type: Free Spirit)*
2) A segment of South Asian *(EQ Type: Free Spirit)*

The segments to pursue are those which are sensitive to the environmental ecosystem, have a higher household income than the BC average and enjoy key tourism activities that potentially resonate with the Cariboo Chilcotin Coast tourism region.

Another set of profiles that have a medium degree of fit and potential are:

1) The 'Boomer Bliss' *(EQ Type: Authentic Experiencer)*, with a higher-than-average household income and spend on vacations.
2) The 'Down to Earth' *(EQ Type: Rejuvenator)* who connect with the outdoors, like hotels, use social media, connect with conscious brands and are open to consuming content via advertising to influence their purchasing decisions.

Geographically, the top 5 source markets between 2019 and 2020 were Prince George, Surrey, Vancouver, Kamloops, and Abbotsford. When you bring together the profiles associated with Prizm and their most concentrated areas of residence, 'Suburban Sport' is a good geographical fit, while 'Country & Western' and 'Scenic Retirement' are less so. As fourth profile for the CCC, 'Family Mode' is also a good fit and is aligned with the top 5 source markets for the region. 'Asian Achievement' is a good fit while 'South Asian' incorporates Surrey, Vancouver and Abbotsford in their top 4 residential areas.

See Appendix 1 for Prizm's overview on consumer behaviour by geographic location based on purchasing preferences for the profiles highlighted above. As complemented by Environics Analytics, for a better understanding of current and future visitors to the CCC region.

Covid-19 Effects

The pandemic has contributed to a range of effects to the region's tourism industry, and each have resulted in having to react accordingly with limited information available. The immediate impact was the closure of the international borders and the loss of tourists with the economic impacts that accompanied it. The challenge then becomes identifying what the landscape will look like once the borders and restrictions are lifted and how long it will take for the business levels to return to the pre-pandemic era of 2019 ~ 2020.

As of now, below is the list of businesses which have closed since the beginning of the pandemic (March 2020 to current). Additionally, some of these businesses are listed as permanently closed due to the impact caused by the 2021 wildfire season. This list does not include businesses listed as for sale or who have successfully transferred ownership throughout this period.

Central Coast Adventures & Whiskey Cove B&B (C19)
Itcha Mountain Outfitters (C19)
Tzenzaicut Lake Resort (C19)
Float House Inn – Bella Coola (C19)

**Running list as pandemic/industry disruptions continue.*

Figure 15: Return to Pre-Pandemic Economy

Travel Conditions	REV. IN 2021 ($B)	LOSS IN 2021 VS 2019 ($B)	LOSS IN 2022 VS 2019 ($B)	RETURN TO 2019 LEVEL
Ideal	**$55.0**	**-$50.1**	**-$14.5**	**2023**
Current	**$51.1**	**-$54.0**	**-$22.5**	**2025**
Poor	**$46.0**	**-$59.1**	**-$34.8**	**>2026**

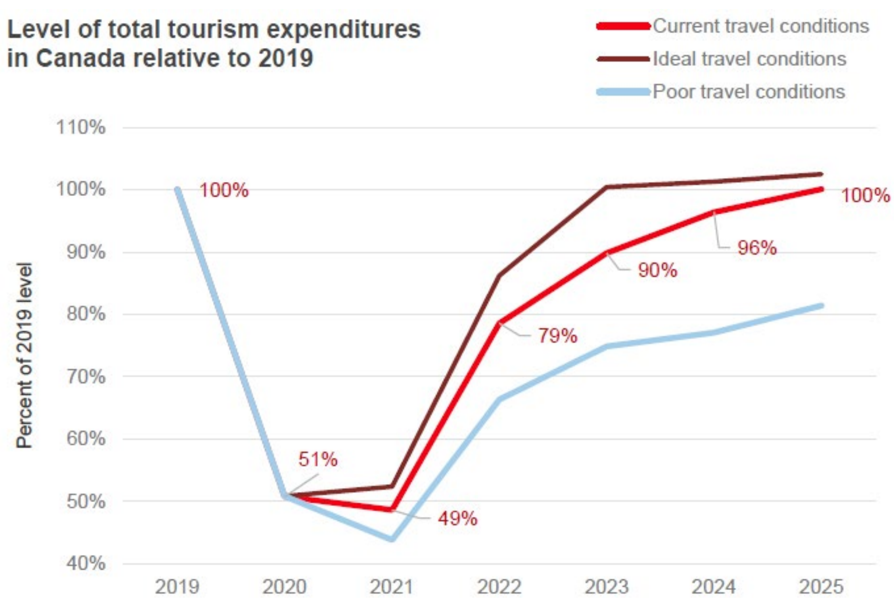
Source: DC Research, May 2021 Forecast; https://www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Predicting future trends includes monitoring these elements:

- Return of large conferences and events
- International travel restrictions, travel passports
- Consumer trends (staying local, social distancing)

From a marketing and conversion perspective, the challenge is competing with every other destination and ensuring a strong ROI while operating on a lesser budget in what will be a crowded and noisy marketplace. The travel restrictions in the summer of 2020 as well as what is expected for summer 2021 may benefit the region long term as the inability for international travel can really provide regions such as Cariboo Chilcotin Coast the impetus to establish a larger presence throughout the local provincial market. This can also be applied to key markets in Alberta.

Figure 16: Tourism Expenditure Recovery



Source: DC Research, May 2021 Forecast.... https://www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Tourism expenditure recovery is shown here on a sliding scale based on the three levels of travel conditions. These conditions are primarily outside of the control of the CCCTA and CCCTMA, although the organizations will adapt accordingly. An example of travel conditions can include the opening of international borders and any vaccination policies that may be enforced by entry for visitors from certain regions.

Figure 17a: Domestic Market Recovery

Outlook for the Canadian Lodging Industry HVS

The following forecasts for the Canadian lodging industry reflect the current outlook of market participants, assuming the vaccination roll out is completed and the U.S. border re-opens by September 2021.

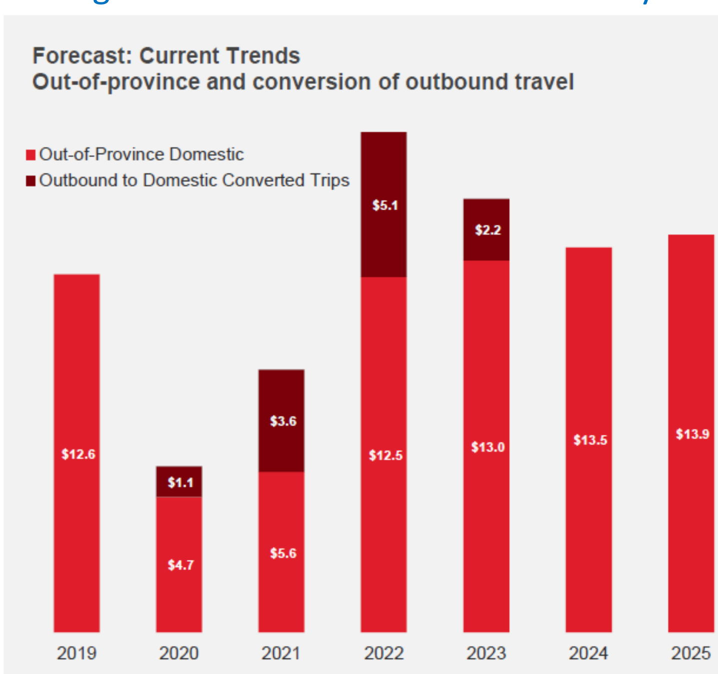
	Historical			Forecast			
	2018	2019	2020	2021	2022	2023	2024
Occupancy	66.3%	65.2%	32.0%	43.7%	56.4%	63.5%	65.0%
Percent Change		*-1.7%*	*-50.9%*	*36.3%*	*29.0%*	*12.7%*	*2.4%*
Average Rate	$163.40	$165.23	$129.70	$142.28	$156.77	$163.04	$167.93
Percent Change		*1.1%*	*-21.5%*	*9.7%*	*10.2%*	*4.0%*	*3.0%*
RevPAR	$108.33	$107.73	$41.56	$62.15	$88.35	$103.53	$109.16
Percent Change		*-0.6%*	*-61.4%*	*49.6%*	*42.2%*	*17.2%*	*5.4%*

Source: STR and HVS

This represents the current expectation for the timing and pattern of recovery, with occupancy expected to recover first, followed by ADR. All forecasts are in current dollars.

Source: BC Hotel Association online presentation at TIABC Sector Meeting, June 2021

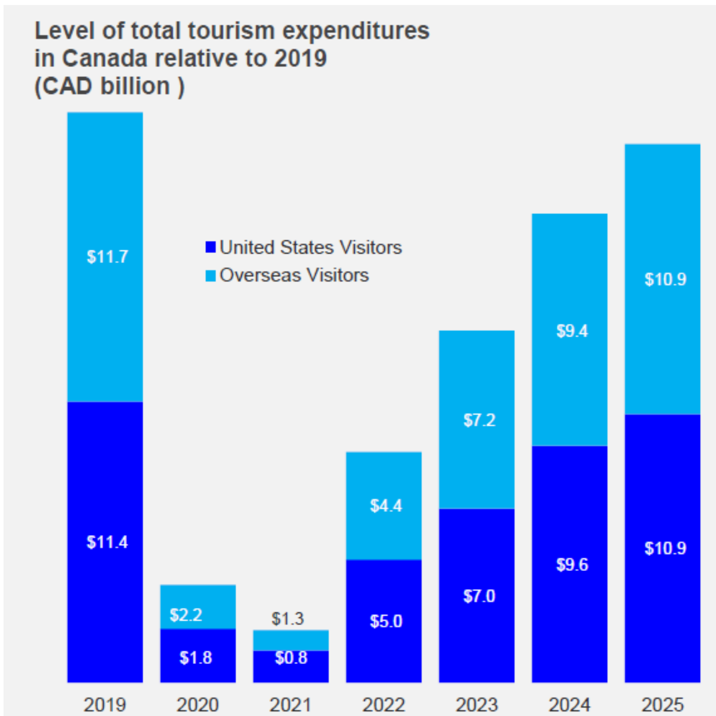
Figure 17b: Domestic Market Recovery



Source: DC Research, May 2021 Forecast…. https://www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Although the pandemic will be limiting on inbound international travel until 2025 according to current travel conditions (See Figure 9), it also is forecasted to provide an opportunity to convert outbound travel. The data states an amount of what would traditionally be spent travelling abroad by Canadians will be instead spent travelling domestically. This opportunity is currently projected to peak in 2022 and continue to be present in 2023. This leads to Canadian tourism destinations to focus more marketing efforts on the domestic market for the short term as well as to continue monitoring the trend in case it trickles into 2024 and beyond.

Figure 18: Future Canadian Tourism Recovery and Growth



Source: DC Research, May 2021 Forecast…. https://www.destinationcanada.com/en/coronavirus-updates/covid-19-research

Pent-up demand and saved discretionary spending are expected to lead to a sharp increase in national tourism revenues from overseas and United States visitors in 2022. However, national tourism expenditures are not expected to recover to a pre-COVID-19 level until approximately 2025.

Barriers & Capacity Restraints

Barriers to Entry

- Inconsistent internet coverage, Wi-Fi, cell coverage,
- Expensive and limited air travel options,
- Road conditions affected by weather, wayfinding,
- Amenities (brand/chain hotels, EV stations, availability of dining options).

Identify Capacity Constraints

Achieving success in tourism marketing will always come with the risk of oversaturating the region. This sentiment was echoed during the stakeholder engagement phase of this strategy and was felt as imperative to ensure that the region's natural environment and economic ecosystem continue to operate within their comfortable capacities. Ensuring a strong grasp of the region's capacity with regular engagement and monitoring of consumer experiences with stakeholder feedback is a recommended practice for this strategy.

Geography will continue to be a factor which affects the flow of visitors to the region. Land transport continues to be the primary mode of transportation for visitors. This leads to the inland areas receiving more traffic than the Central Coast. This sub-regional dispersion encourages a strategic approach to offset the lack of visitor capacity and land access in the Central Coast by focusing on targeting promotions towards a higher yield, lower volume tourism market.

The lack of sub-regional data hinders the ability to be more accurate with the measurement of visitor flow as well as identifying any emerging trends.

Destination Canada Strategy

Destination Canada operates on a three-tier approach guided by three objectives. These revolve around increasing demand, advancing commercial competitiveness, and improving their corporate efficiency and effectiveness. Although Destination Canada is a few layers removed from CCCTMA, it still remains very relevant as their research and forecasting aids in setting the bar for the rest of the industry to follow.

As per Destination Canada's 2020 – 2024 Corporate Plan, the following relevant objectives are directly from their Strategic Plan. The CCCTA and CCCTMA have adopted a number of these objective elements and thus are aligned to collaborate at the provincial and/or federal level of implementation.

Objective 1: Increase demand for Canada with innovative marketing.

- Expanding Seasonality & Geographic Dispersion: due to compression across Canada – the aim to gain a better understanding of partner availability of products and experiences outside of urban areas across Canada. Specifically look to both increase visitation across non-peak travel periods and via content marketing to encourage travellers to visit more places across the country.
- Increasing Yield (value): work with the industry to ensure that the right products are available and marketed appropriately targeting visitors who travel further afield, spend more, and stay longer.
- Integrated & Results-Focused Approach: Destination Canada has shifted their allocation of resources to objectives-based across all target markets driving incremental visitation and tourism spending.

Objective 2: Advance Commercial Competitiveness of Tourism Sector.

- Collaboration to Innovate: to equip the industry with the platforms to collaborate and the insights to make the best decisions while continuously improving processes to better serve Canada's industry and partners. This includes using Google to strengthen the sector's digital and strategic marketing capabilities; improve the analysis and sharing of data and better measure the impact of marketing investments and efforts.
- Collaboration to Increase Destination Investment: by striving to align Federal components along with Provincial and Territorial destination tourism bodies and private sector – to unlock investment via a collaborative public-private sector model. To fulfill the need for substantial investments to build new attractions & accommodations and the services to support both.

Source: Destination Canada 2020-2024 Corporate Strategy

Figure 19: Destination Canada Strategy Overview

MEASURE	2018 RESULT	2019 TARGET	2020 TARGET	2021 TARGET	2022 TARGET	2023 TARGET	2024 TARGET
GOAL: Visitor economy provides more benefits to more people in more parts of the country							
Attributable tourism export revenue[1]	$1.76 billion	$1.72 billion	$1.85 billion	$1.94 billion	$2.03 billion	$2.13 billion	$2.24 billion
Attributable arrivals	1,392,070	1,308,000	1,408,000	1,449,000	1,491,000	1,534,000	1,578,000
Objective 1: Increase demand for Canada with innovative marketing							
Unaided consideration[2]	5.9%	8.2%	7.2%	7.9%	8.5%	9.0%	9.4%
Objective 2: Advance the commercial competitiveness of the tourism sector							
Partner co-investment ratio	0.9:1	1:1	1:1[3]	1:1[3]	1:1[3]	1:1[3]	1:1[3]
% of partners who indicate Destination Canada activities advance their business objectives	80%	85%	85%	85%	85%	85%	85%
Objective 3: Increase corporate efficiency and effectiveness							
Marketing and sales ratio[4]	93%	90%	90%	90%	90%	90%	90%

[1] Expressed in nominal dollars.
[2] Percentage of long-haul travellers in our markets who name Canada as one of the top three destinations they are likely to visit in the next two years.
[3] The constrained ability of provincial, territorial and destination marketing partners to co-invest as in previous years as a result of uncertainty in their funding levels may impact our actual results.
[4] Percentage of marketing and sales expenditures over total expenditures.

Source: Destination Canada 2020-2024 Corporate Strategy

Provincial Strategy Alignment

Destination BC Iconics Strategy

Destination BC is a key provincial tourism partner and opportunity for leveraging of CCC initiatives. Alignment with their annual strategies is a deliverable of the provincial MRDT program.

Figure 20: Destination BC Corporate Strategy 2020-2023 Summary

Source: Destination BC Corporate Strategy 2020-2023

As Destination BC continues to roll out their 10-year strategy, CCCTMA will continue to remain engaged and up to speed on all opportunities that this will provide for stakeholders in the region. This includes areas such as destination stewardship and partnership opportunities.

Situational Analysis

Brand Positioning

Successful to-date investments in growing the reputation of the region as a travel destination will continue to compound in reinforcing the positioning of the *Land Without Limits* and *Super, Natural British Columbia* brands. Continued development of independent sub-regional initiatives (Gold Rush Trail, Land of Hidden Waters, the Chilcotin and The Great Bear Rainforest) will require increased in-house coordination to ensure initiatives and targeting are complementary versus in competition of.

Tagline
Land Without Limits

Brand Positioning
Diverse Adventures & Pioneering Spirit

Visitor Experience Statement
The Cariboo Chilcotin Coast region offers limitless one-of-a-kind experiences for the adventurist who enjoys the “path less chosen,” for those looking to re-connect with their pioneering spirit, nature, and themselves.

Gold Rush Trail

Where history meets nature. Rolling hills, mountains, rivers, lakes and wildlife inspire both adventurers and historians to follow the original Cariboo Waggon Road on the Gold Rush Trail.

Chilcotin

Visit British Columbia's living "Wild West" where cowboy culture is still thriving and adventure is close at hand, from aerial sightseeing to heli-skiing, guest ranching excursions and river rafting thrills.

Great Bear Rainforest

The wild, rugged beauty of the Great Bear Rainforest draws visitors from around the world who come to fish, hike, bike, kayak, take a wildlife eco-tour and enjoy the natural splendour of this unique region.

Land of Hidden Waters

"BC's Fishing Highway" provides access to nearly 100 secluded lakes perfect for some of BC's best freshwater fishing as well as to enjoy watersports, camping, and outdoor adventure.

Funding

Regional MRDT Breakdown

MRDT Collected by Region

Figure 21: Estimated Regional MRDT Revenues

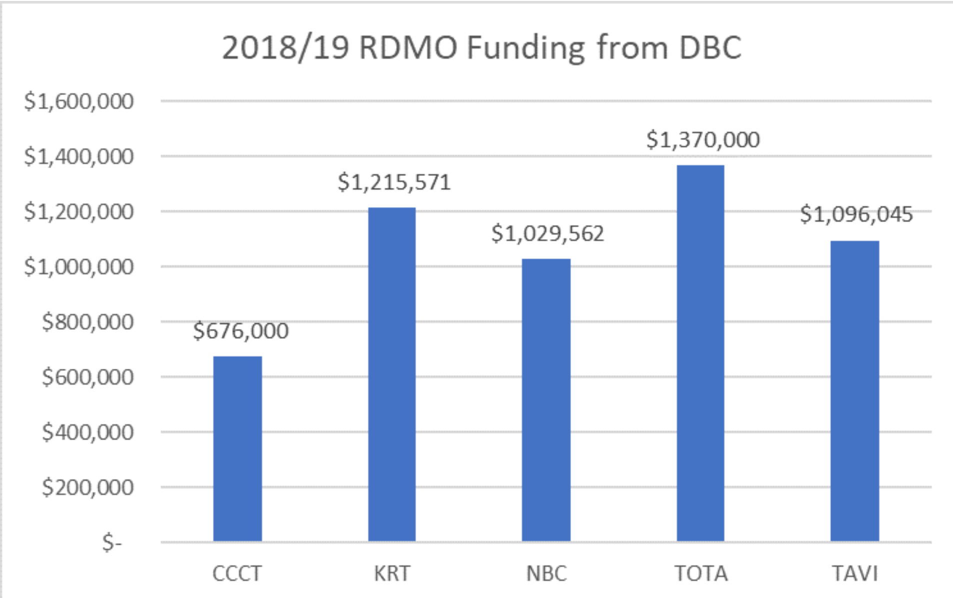
Region	**2018**	**2019**	**2020**	**2021**
Vancouver Coast and Mountains	$46,520,000	$58,731,000	$19,897,000	*TBA*
Thompson Okanagan	$ 8,472,000	$10,087,000	$ 6,831,000	*TBA*
Cariboo Chilcotin Coast*	$ 672,019	$ 715,454	$ 583,337	*TBA*
Vancouver Island	$11,596,000	$ 13,294,000	$ 6,850,000	*TBA*
Kootenays Rockies	$ 3,182,000	$ 3,919,000	$ 2,926,000	*TBA*
Northern BC	$ 1,563,000	$ 1,928,000	$ 1,424,000	*TBA*

Source: BC Stats - Tourism "Room Revenues and Property Counts": https://www2.gov.bc.ca/gov/content/data/statistics/business-industry-trade/industry/tourism

** Source data adjusted for Cariboo Chilcotin Coast from BC Stats to figures from actual remittances received from the Ministry of Finance.*

Regional Funding

Figure 22: Regional Funding from DBC

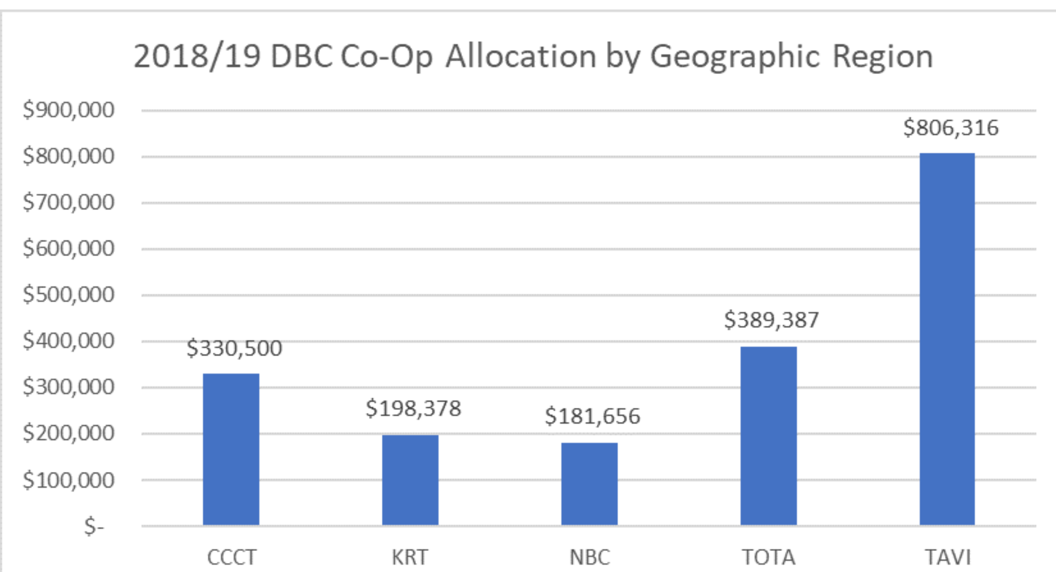


Source: Regional Contract FY1415-FY1617 as posted on http://www.destinationbc.ca/About-Us/Corporate-Documents.aspx

The CCC continues to receive the least amount of regional funding compared to its provincial counterparts. This reinforces the need for the region to be efficient and targeted in its marketing spend.

Other Regional Funding Sources

Figure 23: Regional Allocation of DBC Co-Op Funding



Source: Regional Contract FY1415-FY1617 as posted on http://www.destinationbc.ca/About-Us/Corporate-Documents.aspx

DBC Co-op allocation continues to be a great resource for the region to receive matching funds for marketing initiatives. This chart also reflects the efforts from CCCTMA to help foster environments of co-operation and recognizing opportunities to apply and qualify for this funding. This will continue to be a focus for the region moving forward.

New CCC Product

New Products to Market

As consumer needs continue to shift to itinerary-based and experiential travel, demand for packaged options and availability of basic services to facilitate will continue to grow for the region. While the CCCTMA's mandate is limited in scope towards development, a role exists to promote road-trip itineraries and established experiences to provide demand rationale for continued infrastructure investment. Sharing results from market research and owned initiatives to provide rationale for private and public investment is valuable to support this role.

The CCCTA is continuing to develop internal certification processes and programs for accessible and sustainable tourism product. Businesses that meet industry and internal standards will then be elevated to dedicated regional promotions targeted to respective markets.

A list of Cariboo Chilcotin Coast's new products since 2018 are below:

Barney's Lakeside Resort (Horseback Riding Experience) - Puntzi Lake
Willow Grove B&B Inn & Traditional Arts School - Horsefly
Taseko Adventures - Taseko
Firvale Wilderness Camp - Firvale
Wettstone Guest Ranch - Bridge Lake
Elkin Creek Guest Ranch – Nemiah Valley
Tl'etinqox Campsites & Gas Bar – Alexis Creek
South Point Resort – Canim Lake
Great Bear Sailing Adventures - Bella Coola Valley
Shaky Knees Treehouse - Likely
Tutti Gravel Inn - Clinton
Over the Top Adventures – Bella Coola Valley
Barkerville Historic Town & Park (Indigenous Cultural Interpretations) - Barkerville
Red Cariboo Resort – Anahim Lake
Siwash Lake Wilderness Resort (Fire Ecology Hike™)- 70 Mile House
Crooked Tail Resort – Kleena Kleene
Norm Hann Expeditions – Great Bear Rainforest
Bella Coola Heli-Sports (Maple Leaf Adventures Catamaran Experience) - Great Bear Rainforest

Aegir Adventures – Bella Coola Valley
Mount Timothy Ski & Recreation Resort – Lac La Hache
Campbell Hills Guest Ranch – Lac La Hache
Thunder Mountain Adventures – Bella Coola Valley
Great Bear Heli-skiing – Bella Coola Valley
Lillooet Brewing Company – Lillooet
Fox Mountain Brewing – Williams Lake

Current and New Potential Partners

Organization	**Role in Tourism in the CCC region**
Indigenous Tourism Association of Canada	Develops and markets Indigenous tourism experiences within the province and country.
Indigenous Tourism Association of BC	Markets Indigenous tourism experiences within the province.
Barkerville Historic Town & Park	Site planning, website, collateral, promotion.
BC Ferries	Provides ferry transportation to the region.
Bella Coola Valley Tourism Association	Tourism planning, visitor servicing, website, promotions.
Bridge River Valley Economic Development Society	Tourism planning, visitor information kiosks, heritage site management, website, promotions.
Destination Canada	Markets Canada in key international markets. The CCCTA has eight products in their Signature Experiences program.
Cariboo Mountain Bike Consortium	Promotes mountain biking in the Cariboo.
City of Quesnel	Economic development, visitor servicing, collateral, promotion, WorldHost Training Services.
City of Williams Lake	Economic development, visitor servicing, collateral, website, promotions, WorldHost Training Services.
District of 100 Mile House	See South Cariboo Tourism Association.
District of Lillooet	See Tourism Lillooet.
District of Wells	Visitor servicing, collateral, website, promotion, WorldHost Training Services.
Fishing Hwy 24 Tourist Association	Website, signage, promotions.
Great Bear Project	Promotions, collateral, signage.
Gold Rush Trail Management Committee	Tourism planning, website, social media, collateral, promotions, signage, product development.
Horsefly Board of Trade	Website, visitor servicing, collateral, promotions.
Heiltsuk First Nations	Product development.
Interlakes Economic Association	Economic development, collateral, promotions.

Likely & District Chamber of Commerce	Visitor information kiosks, website, promotions.
New Pathways to Gold Society	Historical restorations, funding, promotions.
Pacific Coastal Airlines	Provides air transportation to the region.
Regional Districts: Cariboo Regional District, Central Coast Regional District, Thompson-Nicola Regional District - Area E, Squamish-Lillooet Regional District - Area A & B, Fraser-Fort George Regional District – Area E, Bulkley-Nechako Regional District – Area E, Kitimat-Stikine Regional District – Area C, part 2	Support economic development and funding.
Soda Creek First Nation (Xatśūll)	Promotions, signage.
South Cariboo Tourism Association	Visitor servicing, website, printed guide, promotions, coop marketing.
Tsideldel First Nation	Product development.
Tourism Lillooet	Visitor servicing, promotions, collateral material.
Village of Clinton	Visitor servicing, electronic visitor information kiosk, website, promotion.
West Chilcotin Tourism Association	Tourism planning, visitor information kiosks, product development, signage, collateral, website, promotions.
Williams Lake & District Chamber of Commerce	Manages the Tourism Discovery Centre (the visitor centre) for the City of Williams Lake.
Xeni Gwet'in First Nations Government	Product development, tourism planning, website, collateral visitor guide, Quality Assurance - Sustainable Tourism Protocol agreements.
Xwísten First Nation	Product development, collateral, promotion.

Leveraging public and private partnerships addresses barriers of funding, packaging, infrastructure, and duplication. The CCCTMA will continue to work closely with respective sector, municipal, Indigenous, and consortium groups on respective marketing efforts.

Previous corporate partnership campaigns, such as with Kal Tire (2019) and The History Channel (2021), have generated immense campaign leveraging and stakeholder satisfaction. Brand collaborations with highly aligned partners will continue to reach overall performance objectives and create legacy program milestones.

New Technologies

Increases in regional exposure and stakeholder referrals as a result from technology improvements have led to greater importance for assurance that quality referrals are generating traceable dollars to individual businesses. In addition to measuring return-on-investment, the CCCTMA has an interest in providing resources to improve stakeholder digital literacy and presence. While infrastructure improvements to enable increased digital literacy do not fall under MRDT parameters, the provision of digital training and services strengthens proof-of-concept and quality referrals to stakeholders is applicable.

Strategy

Vision

*"**We** invite and welcome the right visitors,*
who embrace, celebrate and respect our vibrant destination,
our heritage, people and cultures; and
***We** advance innovative, sustainable visitor economy solutions,*
that increase business intelligence and performance
so that
our residents, local businesses and region thrive."

Areas of Focus

Primary

The engagement component of this plan as well as annual stakeholder surveys (Appendix 2) have provided the following areas for primary focus:

- Increasing the efficiency of marketing campaigns by ensuring methods to collect an accurate return on investment as well as sharing this with the relevant sectors involves.
- Reinforcing the regions' identity which positions it as an outdoor recreational destination above that of a historical one. This allows for justification of spending to be reflective of visitor demand and highest opportunities for success.
- Responsible Tourism – This is a two-pronged request which involves focusing on marketing to tourists whom are already aligned with the region's ideals of ensuring that the natural areas visited are not altered or damaged in any way. This also involves the inclusion of educational components in marketing and communications activity to ensure tourists are aware of the respect that the natural environment requires and how to ensure that they are well equipped in supplies and expectations for the region.

Secondary

The secondary components were also derived from recent stakeholder engagement. The reason for these items being listed as secondary is in no means designed to consider them of inferior importance. In some cases, it may be due to the timeline for these items, specifically if working with third parties and partners who are on a longer timeline.

- Exploring opportunities to increase revenue and visitation to the region by maximizing reach with the current funding. Methods include applications to co-op funding programs, corporate partnerships and consortium collaboration.
- Work with the region's Indigenous tourism operators. This is listed as a secondary focus as it is important to ensure that products and experiences are market-ready and considered authentic when promoted by the CCCTMA.
- Sustainability and accessibility of the region's tourism experiences will also be a focus of this strategy as it connects with the sentiment of the CCCTA brand as well as the desires of the residents to ensure that their communities continue to be enjoyable within the capacity of their limits.
- Highlight the various activities that are available around the accommodation properties as a means to increase overnight stays.

Strategic Components

The strategy and actions are designed to ensure that they capture the key components identified above. Building off of the previous 2018 – 2022 MRDT Strategy, these components work to create a strategic path based on the data collected throughout this document and to use that information to engage specifically with those tourists that provide the best fit for the CCC region.

These marketing strategies will contain measures for ROI to promote efficient use of funds and discovery of which methods are worth continuing.

- Marketing Strategies
- Destination & Product Experience Management Strategies
- Visitor Services Strategies
- Meetings and Conventions Strategies

The activities below are designed to encompass the key strategy components while proceeding in concert with the CCCTA's vision and within the capacities of the CCCTMA and their partners to execute.

Marketing Strategies

Core Marketing Functions

1.	**Promote targeted campaigns to yield greater ROI**
Description	The CCC region has greatly benefited from the use of MRDT funds in creating a compelling brand with consistent marketing. Further refinement of these strategies is crucial to sustain the growth achieved and to continue to deliver on the wishes and experiences of businesses. Continued success of owned initiatives also creates greater rationale for increased funding requests to support this growth.
Actions	• Reinforce key domestic markets based on past visitation data as well as future visitor trends. • Proactively market to German-speaking Europe through dedicated initiatives and respective Destination BC and Destination Canada leveraging. • Continue successful corporate partnership campaigns, specifically those with brands which align with the region's brand initiatives. • Continue to keep digital assets up-to-date and available for easy sharing with partners, while maintaining all rights for their usage.
Budget	• $250,000 to be allocated to the Destination BC Co-Op program with the intent for additional leveraging. • Min. $50,000 for brand collaboration initiatives. • $30,000 for targeted German-speaking Europe campaigns.
Management & Governance	• Execution managed by CCCTMA with the guidance of the regional Marketing Committee.

Organic Brand Recognition

2.	**Refining regional identity**
Description	Reinforcing the identity of the region which is supportive of the brand vision and prioritizes the destination's primary product as its natural, outdoor recreational spaces. The historical experiences in the region will still hold a valuable place in product placement and marketing, but secondary.
Actions	• Primary placement of outdoor imagery and experiential focus in promotional materials. • Ensuring that visitor trending data that supports outdoor recreation as the primary desire to visit is shared with stakeholders regularly. • Ensuring to keep our stakeholders in alignment and informed of the regional identity. This can include educating new businesses as well as following up each year in the annual MRDT surveys to ensure all stakeholders feel comfortably up to date.
Budget	• Included in the overall marketing budget.

Management & Governance	• Execution managed by CCCTMA with the guidance of the regional Marketing Committee.

Market Research

3.	**Implement and disseminate research & performance monitoring/measurement**
Description	Research and performance marketing is a means to ensure that the region is accurately promoting its product in concert with development. In turn, this is meant to allow fact-oriented business decisions and for CCCTMA to guide their regional stakeholder businesses through business insights to improve decisions at the individual tourism business level.
Actions	• Maintaining regular audits of the region's tourism products and engaging with them to monitor capacity trends. • Monitor Destination BC and Destination Canada forecasts and trends identifying which segment are growing/decreasing in demand. • Conduct regular communication and engagement with stakeholders to ensure that they are aware of visitor trends. • Work with neighbouring regions, sector associations and community groups to identify opportunities for co-op marketing strategies. • Adjust the annual strategic plans to reflect any adjustments in spend to remain fluid and flexible. • Work with segments whose demand is decreasing and provide support/guidance on how their products can be packaged or pivot to ensure their stability.
Budget	• $15,000 allocated annually to ensure robust information is being gathered to guide business decisions and that impact the effectiveness of this and subsequent plans.
Management & Governance	• Execution managed by CCCTMA with collaboration and utilization of CCCTA, BCRTS, DBC and DC research initiatives.

Conversions and Economic Impact

4.	**Utilization of marketing initiative/program data as a means to determine conversion and economic impact of campaigns.**
Description	Application of methods to recognize value of dollar spend on marketing campaigns. Sharing of results with stakeholders to ensure they are engaged and can see demonstrated value, effectiveness and efficiencies of regional initiatives.
Actions	• Utilization of booking engine (RootRez), channel analytics, to drive revenues (value) at the local business & regional levels. • Activate this information to advance knowledge of CCCTMA's markets, improve suitability of products/experiences, buying experience, fit with market purchasing propensities progressively with individual regional tourism stakeholders. • Increase communication via the Marketing Committee with relevant stakeholders on targeted campaigns. • Work with stakeholders to promote feedback to make up for current lack of sub-regional data. • Progressively seek to report on results in easy-to-understand reporting for regional stakeholders and government partners at all levels which incorporate the economic impact of CCCTMA's marketing investments.
Budget	• Included in the overall marketing budget.
Management & Governance	• Execution managed by CCCTMA with the support of the regional Marketing Committee.

Destination & Product Experience Management Strategies

Indigenous Content

5.	**Working with ITBC to promote and support Indigenous tourism**
Description	Provide support to the local Indigenous tourism business owners and operators to increase development and preparation of their products and experiences.
Actions	• Work with ITBC for promotion and support assistance. • Share applicable brand, Biosphere and digital guidelines to ensure that new products are in alignment with CCCTMA. • Identify opportunities for match funding from 3rd parties for any co-operative endeavours and campaigns. • Confirmation of story-sharing and land usage permissions with local Indigenous authorities, as required.
Budget	• Included in the overall marketing budget.
Management & Governance	• Execution managed by CCCTMA with the support of the Regional Indigenous Tourism Specialist, CCCTA and ITBC.

Key Strategic Partnerships

6.	**Work with stakeholders and community groups to benefit from DBC Co-Op program**
Description	To provide marketing opportunities and leveraged funding for businesses and aligned sector associations. CCCTMA will allocate funds that can be available to subsidize industry buy-in, creating more affordable and greater reaching marketing efforts. Contributing to aligned sector associations is to enable a greater leveraging of funds to highly targeted activity sector and encourage regional sector memberships.
Actions	• Create packaged advertising adjacency options for stakeholders on larger scale regional media buys. • Identify and contribute funds to align co-op projects lead by activity sector associations. • Provide leadership and collaborate with community-lead tourism marketing initiatives to ensure alignment.
Budget	• $40,000 for stakeholder and community advertising adjacency program. • $80,000 for partner marketing contributions to consortium and sector-led Co-Op projects.
Management & Governance	• Execution managed by CCCTMA with the support of the regional Marketing Committee.

Digital Literacy

7.	**Increase individual stakeholder digital literacy capacities**
Description	Work with tourism business owners and operators to increase their ability to best maximize the benefits of modern digital technology. Assisting stakeholders in understanding technology and how to manage entities such as TripAdvisor to their benefit. There are also benefits to the region as well as its stakeholders through the alignment of tracking, conversion and analytical data so that well informed decisions can be made as well as easily interpreted.
Actions	• Stakeholder training to increase familiarity of programs such as Google Analytics, • Updating stakeholders with emerging social media marketing trends, platforms and usage of #ccclives for user generated content detection, • Ensure businesses are fully optimized on online listing platforms. Provide training on benefits of property and channel management systems.
Budget	• Included in the overall marketing and marketing research budgets.
Management & Governance	• Execution managed by CCCTMA while complementing industry development initiatives through CCCTA, BCRTS and DBC.

Visitor Services Strategies

Responsible Tourism

8.	**Protecting region's natural environment by educating & attracting responsible tourists**
Description	Keeping the natural resources of the regions assets intact has been identified as an important goal by the stakeholders and CCCTMA. Further, educating tourists pre-travel on aspects of responsible travel while in-region has been cited as a high-need point of communication from both communities and businesses. It is very important to balance the goals of increased visitation with the risks of over usage of sensitive natural areas. This also includes adhering to sustain the region's Biosphere designation.
Actions	• Targeted marketing towards tourists aligned with responsible tourism behaviours. • Ensuring marketing messages include verbiage which educates the visitor on expectations of the region as well as how to be prepared to adhere to them. • Leverage the branding asset of the Biosphere designation.
Budget	• Included in the overall marketing budget.
Management & Governance	• Execution managed by CCCTMA with the support of the regional Marketing Committee, CCCTA, Board of Directors and BCRTS.

Sport/Meetings & Conventions Strategies

The Sport, Meeting and Convention market plays a vital role for many tourism destinations in British Columbia. This is primarily evident in the more populated areas where there is adequate infrastructure in place including relevant and up to date facilities with accompanying accommodation, recreation and easy travel access. This market can also be effective for destinations which are looking to expand their facilities by using sporting events as catalysts for securing capital investment.

Sport Tourism & M.I.C.E.

9.	**Support for Sport Tourism, Meetings, Events and Incentive Market**
Description	Continue to provide an environment for Sport Tourism and Meeting/Incentive initiatives to be achievable if an ideal opportunity is presented. The aim is to progressively support sport tourism initiatives which are led by municipalities and sport organizations. Communities that are recognized as a fit include Williams Lake, Quesnel, 100 Mile House and Lillooet.

	For the Meetings, Incentives and Events strategy, its viability will be sought progressively for the CCC region. Again from a position of support and awareness of opportunity
Actions	• Keep the database of relevant venues updated and easily able to be shared • Encourage Sub Regions to update CCCTMA on the completion of any new venues or renovations to existing facilities. • Encourage stakeholders to share any interests or bids on events that CCCTMA may be able to provide letters or support. • Commit a webpage for stakeholders to be able to access updated application forms for Provincial and Regional event support applications • Communicate with local sport groups (Via municipal partners) that these resources are available.
Budget	• $2,500 annually for staff-time facilitation.
Management & Governance	• CCCTMA

Budget

MRDT Forecasting

MRDT represents the largest sum of variable revenue for the region. Forecasting MRDT based on the most recent annual data would not be accurate as those results were affected by the pandemic restrictions. The CCCTMA also did not start collecting MRDT until May 2018. For that reason, 2019/20 was selected as the baseline year to represent a return to pre-pandemic levels.

Figure 24: Forecasted MRDT for CCCTMA

Year	% Change	Forecasted MRDT
2023	90% of 2019/20	$702,000
2024	96% of 2019/20	$748,800
2025	100% of 2019/20	$780,000
2026	2025/2026 + 4%	$811,200
2027	2026/2027 + 6%	$826,800

Source: Internal Forecasting based on baseline from Monthly MRDT Remittances through the Ministry of Finance, with the addition of City of Quesnel & District of Wells to the eligible accommodation area.

Using the forecasts from Destination Canada for Tourism Recovery as a guide (Figure 18) where on our current recovery path, tourism revenues should rebound to 2019 numbers by 2025. The 4% reflects a levelling off in correlation with the previous year’s growth. These MRDT forecasts are also based on the region experiencing five normal years. This unfortunately has not been in the case in the past five years as the region has experienced wildfires (2017), serious flooding (2018), the global Covid-19 pandemic (2020), and wildfires in the Central Interior (2021).

Additional Funding Resources

In addition to the revenues provided from MRDT and the Regional Funding, CCCTMA also sources opportunities to collect additional revenue. A list of these activities and actions is listed below.

- Destination BC Co-Op Program
- Retail sales
- Pay-to-play initiatives
- WD Canadian Experiences Fund
- NDIT Marketing Initiatives
- Tourism Events Program (TEP) – as and when applicable to sports/cultural events
- GIC interest accruement

2023-2028 Annual Budgets (Forecasted)

CCCTMA worked with their partners at the regional, provincial and federal levels to source materials to aid in the development of sound, viable budgets for the 2023 ~ 2028 MRDT Strategy. A combination of internal (to CCCTMA) and external foundational data was brought into the process to develop scenarios from which to summarize the following budgets. Covid-19 has also brought in additional sources of program related funding which will be expected to phase out in the 2022/23 fiscal year.

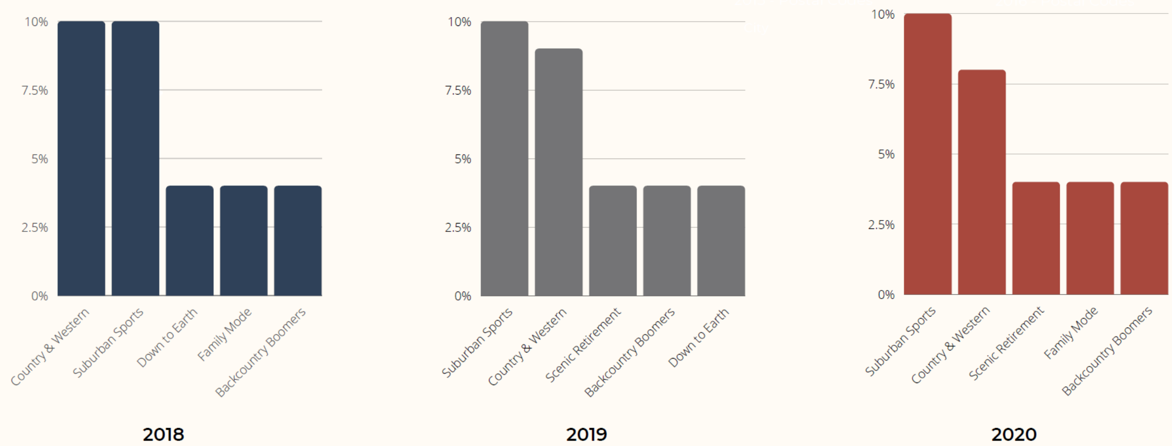
Figure 25: CCCTMA Budget Forecast

Major Category	2023/24	2024/25	2025/26	2026/27	2027/28
Marketing	$908,000	$952,800	$954,000	$1,010,200	$1,025,800
Destination & Product Experience Mgmt.	$0	$0	$25,000*	$0	$0
Visitor Services	$0	$0	$0	$0	$0
Meetings, Conventions, Event & Sport	$5,000	$5,000	$5,000	$5,000	$5,000
Administration	$138,000	$145,000	$155,000	$160,000	$165,000
Social Housing	$0	$0	$0	$0	$0
Other	$0	$0	$0	$0	$0
Total	**$1,051,000**	**$1,102,800**	**$1,139,000**	**$1,175,200**	**$1,195,800**

**Anticipated post-COVID investment in market research to assist in ongoing recovery.*

Appendix I – B.C. Markets Environics & Prizm Data

TOP PRIZM SEGMENTS OF BC TRAVELLERS TO THE CARIBOO CHILCOTIN COAST
2018, 2019 AND 2020



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CARIBOO CHILCOTIN COAST

BCRTS – Cariboo Chilcotin Coast 2020 Visitor Insights – British Columbia, Alberta, Canada

TOP PRIZM SEGMENTS OF BC TRAVELLERS TO THE CARIBOO CHILCOTIN COAST
2018, 2019 AND 2020

Category	Suburban Sports	Country & Western	Scenic Retirement	Family Mode	Backcountry Boomers
Household Count	• Rank 1st by Household Count • 123,442 households, or 6.1% of the total Households in BC	• Rank 3rd by Household Count • 87,601 households, or 4.4% of the total Households in BC	• Rank 2nd by Household Count • 94,025 households, or 4.7% of the total Households in BC	• Rank 17th by Household Count • 51,487 Households or 2.6% of the total Households in BC	• Rank 15th by Household Count • 54,847 households, or 2.7% of the total Households in BC
Maintainer Age	52	57	64	51	63
% of Children at Home	47% of couples have children living at home	48% of couples have children living at home	39% of couples have children living at home	50% of couples have children living at home	37% of couples have children living at home
Household Income	Above Average Household Income of $120,592 compared to BC at $106,681	Below Household Income of $91,291 compared to BC at $106,681	Average Household Income of $100,586 compared to BC at $106,681	Above Average Household Income of $134,916 compared to BC at $106,681	Below Average Household Income of $85,977 compared to BC at $106,681
Top Social Value	Racial Fusion	Attraction to Nature	Ethical Consumerism	Racial Fusion	Attraction to Nature
Social Media Habits	79% currently use Facebook, 36% use Instagram and 23% use Twitter	84% currently use Facebook, 33% use Instagram and 22% use Twitter	79% currently use Facebook, 30% use Instagram and 21% use Twitter	78% currently use Facebook, 35% use Instagram and 23% use Twitter	83% currently use Facebook, 30% use Instagram and 20% use Twitter

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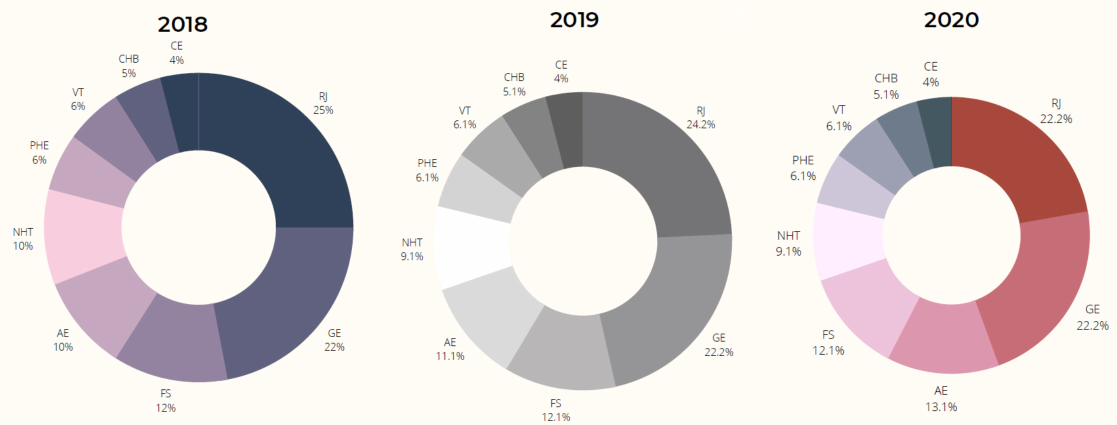
CARIBOO CHILCOTIN COAST

BCRTS – Cariboo Chilcotin Coast 2020 Visitor Insights – British Columbia, Alberta, Canada

TOP EQ TYPES OF BC TRAVELLERS TO THE CARIBOO CHILCOTIN COAST

2018, 2019 AND 2020



Authentic Experiencers (AE)
Cultural History Buffs (CHB)
Cultural Explorers (CE)
Free Spirits (FS)
Gentle Explorers (GE)
No Hassle Travellers (NHT)
Personal History Explorers (PHE)
Rejuvenators (RJ)
Virtual Travellers (VT)

BCRTS – Cariboo Chilcotin Coast 2020 Visitor Insights – British Columbia, Alberta, Canada

TOP EQ TYPES OF BC TRAVELLERS TO THE CARIBOO CHILCOTIN COAST

2018, 2019 AND 2020

Category	Rejuvenators	Gentle Explorers	Free Spirits
Household Count	• Rank 3rd by Household Count • 237,088 households, or 14.4% of the total Households in AB	• Rank 1st by Household Count • 322,371 households, or 16% of the total Households in BC	• Rank 1st by Household Count • 322,609 households, or 19.6% of the total Households in AB
Maintainer Age	55	54	46
% of Children at Home	54% of couples have children living at home	47% of couples have children living at home	53% of couples have children living at home
Household Income	Below Average Household Income of $110,045 compared to AB at $125,945	Below Average Household Income of $93,549 compared to BC at $106,681	Average Household Income of $122,710 compared to AB at $125,945
Top Social Value	Attraction to Nature	Racial Fusion	Need for Escape
Social Media Habits	80% currently use Facebook, 32% use Instagram and 22% use Twitter	80% currently use Facebook, 35% use Instagram and 23% use Twitter	79% currently use Facebook, 42% use Instagram and 33% use Twitter

BCRTS – Cariboo Chilcotin Coast 2020 Visitor Insights – British Columbia, Alberta, Canada

TOP EQ TYPES OF BC TRAVELLERS TO THE CARIBOO CHILCOTIN COAST

CANADIAN EQ SUMMARIES

Rejuvenators

- Mature singles and empty nesters; have lower levels of educational attainment and earn below average incomes
- Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life, be pampered, and indulge themselves
- They are busy, family-oriented Canadians/Americans seeking a relaxing escape, typically within Canada and the US
- They enjoy sharing travel with others (friends or family) and prefer it to be a time for understated indulgence and relaxation, away from their burdens and responsibilities at home

Gentle Explorers

- Middle-class families with children at home; higher rates of 4+ persons at home; below average rates of travel
- Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home
- They travel 'on condition', demanding the very best and most comfortable environments for themselves when they must do so
- They are apprehensive travellers who prefer the tried and true over discovering new destinations and cultures
- They prefer creature comforts and the security of group travel
- Travel is an opportunity to act more vividly and spontaneously than when at home

Free Spirits

- Ethnically diverse, well educated families that earn moderate incomes; living in urban and suburban areas
- Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others
- Tend to be young, experimentalist, committed travellers looking for thrills and frills. They live the travel experience to the fullest
- They seek some structure when they travel so they can indulge in worry-free hedonistic activities
- Enjoy the best they can afford in terms of accommodations and restaurants

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CARIBOO CHILCOTIN COAST

BCRTS – Cariboo Chilcotin Coast 2020 Visitor Insights – British Columbia, Alberta, Canada

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Suburban Sports

PRIZM Segments Included (by SESI): 25

Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Suburban Sports rank 1st, making up 123,442 households, or 6% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 52, 47% of couples have children living at home
- Above Average Household Income of $120,592 compared to BC at $106,681
- **Top Social Value: Racial Fusion** - People who are strongest on this construct are accepting of ethnic diversity within families, such as inter-racial marriage, believing that it enriches people's lives
- Above average interest in Camping, Fishing/Hunting, Cross Country Skiing/Snowshoeing
- Average interest in travelling within Canada (Above Average interest in travel to Jasper, AB); Suburban Sports from British Columbia spent an average of $1,513 on their last vacation
- On average Suburban Sports from British Columbia spend 12hrs/week listening to the Radio, 18hrs/week watching TV, 1hr/week reading the Newspaper and 3.5hrs/day on the Internet. Weekly Magazine usage is minimal
- 79% currently use Facebook, 36% use Instagram and 23% use Twitter
- EQ Type: Gentle Explorer

Market Sizing

Total Population

Target Group: 370,528 | 7.3%
Market: 5,064,371

Total Households

Target Group: 123,442 | 6.1%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Abbotsford, BC (CY)	8.3	19.5	317	52,381	2.6
Surrey, BC (CY)	7.4	5.0	81	183,889	9.1
Langley, BC (DM)	7.0	19.2	312	45,344	2.3
Maple Ridge, BC (CY)	6.8	25.9	421	32,447	1.6
Prince George, BC (CY)	4.7	18.0	293	32,172	1.6
Mission, BC (DM)	4.5	38.2	623	14,485	0.7
Kelowna, BC (CY)	4.1	8.6	140	59,332	3.0
Nanaimo, BC (CY)	4.0	11.9	195	41,687	2.1
Kamloops, BC (CY)	3.6	11.3	184	39,430	2.0
Delta, BC (DM)	3.4	11.0	179	38,106	1.9

Top PRIZM Segments

% of Target Group Households

Source: BCRTS 2020 – Suburban Sports Overview, Market: British Columbia

Country & Western

PRIZM Segments Included (by SESI): 50
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada Country & Western rank 3rd, making up 87,601 households, or 4.4% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 57, 48% of couples have children living at home
- Below Average Household Income of $91,291 compared to BC at $106,681
- **Top Social Value: Attraction to Nature** - How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life
- Above average interest in visiting Parks/City Gardens, Photography, Canoeing and Kayaking
- Above average interest in travelling within Canada (Vancouver, Victoria, Alberta, Calgary, Nova Scotia, Jasper and Montreal), Country & Western from British Columbia spent an average of $1,348 on their last vacation
- On average, Country & Western from British Columbia spend 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (10 min/day)
- 84% currently use Facebook, 33% use Instagram and 22% use Twitter
- EQ Type: Rejuvenator

Market Sizing

Total Population

Target Group: 220,156 | 4.3%
Market: 5,064,371

Total Households

Target Group: 87,601 | 4.4%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Revelstoke, BC (CY)	3.2	73.6	1,691	3,763	0.2
Port Hardy, BC (DM)	1.8	71.4	1,646	2,161	0.1
Merritt, BC (CY)	1.6	45.0	1,034	3,117	0.2
Rossland, BC (CY)	1.6	80.0	1,839	1,752	0.1
Whistler, BC (DM)	1.5	23.7	542	5,686	0.3
Lake Cowichan, BC (T)	1.5	72.6	1,666	1,789	0.1
Princeton, BC (T)	1.5	79.8	1,835	1,592	0.1
Mackenzie, BC (DM)	1.4	70.2	1,605	1,742	0.1
Peace River B, BC (RDA)	1.3	65.6	1,514	1,697	0.1
Smithers, BC (T)	1.3	56.4	1,295	1,950	0.1

Top PRIZM Segments

% of Target Group Households

Source: BCRTS 2020 – Country & Western Overview, Market: British Columbia

Scenic Retirement

PRIZM Segments Included (by SESI): 21
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada Scenic Retirement rank 2nd, making up 94,025 households, or 4.7% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 64, 39% of couples have children living at home
- Average Household Income of $100,586 compared to BC at $106,681
- **Top Social Value: Ethical Consumerism:** The willingness to base consumer decisions on the perceived ethics of the company making the product (e.g., whether management treats employees fairly, co-operates with governments that do not meet ethical standards, or uses testing methods that involve mistreatment of animals). Desire to see companies be good corporate citizens in terms of these new social concerns
- Above average interest in visiting Parks/City Gardens, Photography, Canoeing and Kayaking
- Above average interest in travelling within Canada (Vancouver, Victoria, Alberta, Calgary, Ontario, Jasper, Banff and Saskatchewan), Scenic Retirement from British Columbia spent an average of $1,773 on their last vacation
- On average, Scenic Retirement from British Columbia spend 15hrs/week listening to the Radio, 24hrs/week watching TV, 1hr/week reading the Newspaper and 3.2hrs/day on the Internet. Daily Magazine usage is minimal (10 min/day)
- 79% currently use Facebook, 30% use Instagram and 21% use Twitter
- EQ Type: Rejuvenator

Market Sizing

Total Population

Target Group: 211,478 | 4.2%
Market: 5,064,371

Total Households

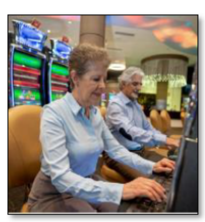
Target Group: 94,025 | 4.7%
Market: 2,010,897

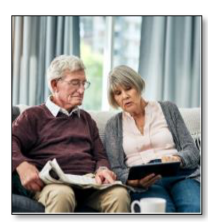
Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
North Cowichan, BC (DM)	4.3	30.4	651	13,376	0.7
Parksville, BC (CY)	3.6	52.2	1,116	6,458	0.3
Nanaimo, BC (CY)	3.4	7.8	166	41,687	2.1
Saltspring Island, BC (RDA)	3.4	64.8	1,388	4,975	0.2
Vernon, BC (CY)	3.3	16.3	348	19,079	0.9
Summerland, BC (DM)	3.3	61.9	1,322	5,001	0.2
Qualicum Beach, BC (T)	3.2	66.9	1,432	4,508	0.2
Kelowna, BC (CY)	3.1	4.9	105	59,332	3.0
Chilliwack, BC (CY)	3.1	8.3	178	35,091	1.7
Courtenay, BC (CY)	2.8	20.7	443	12,649	0.6

Top PRIZM Segments

% of Target Group Households





Source: BCRTS 2020 – Scenic Retirement Overview, Market: British Columbia

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British Columbia Regional Tourism Secretariat

Family Mode
PRIZM Segments Included (by SESI): 19
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Family Mode rank 17th, making up 51,487 households, or 2.6% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 51, 50% of couples have children living at home
- Above Average Household Income of $134,916 compared to BC at $106,681
- **Top Social Value: Racial Fusion** - People who are strongest on this construct are accepting of ethnic diversity within families, such as inter-racial marriage, believing that it enriches people's lives
- Above average interest in Camping, Cycling, Pilates and Yoga
- Above average interest in travelling within Canada (Whistler, Jasper, Nova Scotia), Family Mode from British Columbia spent an average of $1,557 on their last vacation
- On average, Family Mode from British Columbia spend 13hrs/week listening to the Radio, 18hrs/week watching TV, 1hr/week reading the Newspaper and 3.6hrs/day on the Internet. Daily Magazine usage is minimal (8 min/day)
- 78% currently use Facebook, 35% use Instagram and 23% use Twitter
- EQ Type: No Hassle Traveller

Market Sizing

Total Population
Target Group: 153,508 | 3.0%
Market: 5,064,371

Total Households
Target Group: 51,487 | 2.6%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Kelowna, BC (CY)	11.3	9.8	384	59,332	3.0
Maple Ridge, BC (CY)	10.7	16.9	660	32,447	1.6
Kamloops, BC (CY)	9.6	12.6	490	39,430	2.0
Chilliwack, BC (CY)	7.5	11.0	431	35,091	1.7
Abbotsford, BC (CY)	6.9	6.7	263	52,381	2.6
West Kelowna, BC (DM)	5.5	21.4	836	13,286	0.7
Langley, BC (DM)	5.5	6.2	242	45,344	2.3
Langford, BC (CY)	5.3	17.1	668	15,925	0.8
Surrey, BC (CY)	5.1	1.4	56	183,889	9.1
Sooke, BC (DM)	3.3	29.8	1,163	5,708	0.3

Top PRIZM Segments

% of Target Group Households

Source: BCRTS 2020 – Family Mode Overview, Market: British Columbia

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British Columbia Regional Tourism Secretariat

Backcountry Boomers
PRIZM Segments Included (by SESI): 49
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Backcountry Boomers rank 15th, making up 54,847 households, or 2.7% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 63, 37% of couples have children living at home
- Below Average Household Income of $85,977 compared to BC at $106,681
- **Top Social Value: Attraction to Nature** - How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life
- Above average interest in Photography and Visiting Parks/City Gardens
- Above average interest in travelling within Canada (Vancouver, Alberta, Calgary, Nova Scotia, Jasper), Backcountry Boomers from British Columbia spent an average of $1,622 on their last vacation
- On average, Backcountry Boomers from British Columbia spend 15hrs/week listening to the Radio, 24hrs/week watching TV, 1hr/week reading the Newspaper and 3.3hrs/day on the Internet. Daily Magazine usage is minimal (10 min/day)
- 83% currently use Facebook, 30% use Instagram and 20% use Twitter
- EQ Type: Virtual Traveller

Market Sizing

Total Population
Target Group: 117,600 | 2.3%
Market: 5,064,371

Total Households
Target Group: 54,847 | 2.7%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Southern Gulf Islands, BC (RDA)	4.0	95.3	3,488	2,329	0.1
Comox Valley A, BC (RDA)	3.5	55.8	2,043	3,414	0.2
Columbia-Shuswap C, BC (RDA)	2.6	41.1	1,510	3,523	0.2
Sechelt, BC (DM)	2.5	26.8	980	5,040	0.3
Cariboo L, BC (RDA)	2.4	70.2	2,568	1,906	0.1
Sunshine Coast A, BC (RDA)	2.4	99.5	3,664	1,333	0.1
Nanaimo H, BC (RDA)	2.2	66.4	2,434	1,850	0.1
Central Kootenay B, BC (RDA)	2.1	58.0	2,134	1,978	0.1
Columbia-Shuswap F, BC (RDA)	2.0	85.1	3,100	1,259	0.1
Okanagan-Similkameen D, BC (RDA)	1.9	37.9	1,394	2,722	0.1

Top PRIZM Segments

% of Target Group Households

Source: BCRTS 2020 – Backcountry Boomers Overview, Market: British Columbia

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British Columbia Regional Tourism Secretariat

Asian Achievement

PRIZM Segments Included (by SESI): 10
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Asian Achievement rank 5th, making up 86,462 households, or 4% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 55, 55% of couples have children living at home
- Above Average Household Income of $120,295 compared to BC at $106,681
- **Top Social Value: Brand Genuineness** - A tendency to value authenticity and to look for a deeper level of brand experience. People strong on this construct want their brands to have a soul, a history, a founding myth, a place of origin that confers its own culture. These preferences attract them to brands that not only provide the functionality they seek but also feed their imaginations by telling a true and compelling story
- Above average interest in Ice Skating and Visiting Video Arcades and Indoor Amusement Centres
- Average interest in travelling within Canada (Above Average interest in travel to Whistler, BC); Asian Achievement from British Columbia spent an average of $1,566 on their last vacation
- On average Asian Achievement from British Columbia spend 11hrs/week listening to the Radio, 16hrs/week watching TV, 1hr/week reading the Newspaper and 4hrs/day on the Internet. Weekly Magazine usage is minimal
- 75% currently use Facebook, 41% use Instagram and 26% use Twitter
- EQ Type: Free Spirit

Market Sizing

Total Population
Target Group: 273,428 | 5.4%
Market: 5,064,371

Total Households
Target Group: 86,462 | 4.3%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Richmond, BC (CY)	30.4	33.1	771	79,185	3.9
Burnaby, BC (CY)	29.3	25.3	590	100,030	5.0
Vancouver, BC (CY)	17.0	4.8	112	303,965	15.1
Coquitlam, BC (CY)	12.1	18.8	438	55,399	2.8
Surrey, BC (CY)	4.6	2.1	50	183,889	9.1
Saanich, BC (DM)	3.0	5.3	123	48,362	2.4
Port Coquitlam, BC (CY)	1.1	4.1	95	23,113	1.1
New Westminster, BC (CY)	1.1	2.6	60	35,751	1.8
Delta, BC (DM)	0.5	1.1	25	38,106	1.9
North Vancouver, BC (CY)	0.3	1.1	25	26,419	1.3

Top PRIZM Segments

% of Target Group Households

Source: BCRTS 2020 – Asian Achievement Overview, Market: British Columbia

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British Columbia Regional Tourism Secretariat

South Asian Society

PRIZM Segments Included (by SESI): 30
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, South Asian Society rank 11th, making up 68,984 households, or 3% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 49, 65% of couples have children living at home
- Average Household Income of $104,255 compared to BC at $106,681
- **Top Social Value: Traditional Family** - The belief that society should guard against new definitions of what constitutes a "family" and preserve the traditional, "one man, one woman" definition of the nuclear family. The belief that "family" should be defined by legal formalities or institutional sanction. An unwillingness to accept non-traditional definitions of "family," such as common law and same-sex marriages
- Above average interest in Video Arcades and Indoor Amusement Centred, Pilates/Yoga and Zoos/Aquariums
- Above average interest in travelling within Canada (Toronto and Ottawa) South Asian Society from British Columbia spent an average of $1,726 on their last vacation
- On average, South Asian Society from British Columbia spend 10hrs/week listening to the Radio, 14hrs/week watching TV, 0hr/week reading the Newspaper and 4hrs/day on the Internet. Daily Magazine usage is minimal (8 min/day)
- 77% currently use Facebook, 44% use Instagram and 30% use Twitter
- EQ Type: Free Spirit

Market Sizing

Total Population
Target Group: 265,177 | 5.2%
Market: 5,064,371

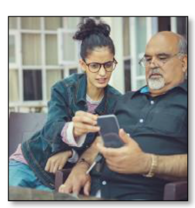
Total Households
Target Group: 68,984 | 3.4%
Market: 2,010,897

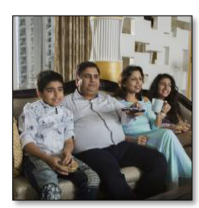
Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Surrey, BC (CY)	73.4	27.5	803	183,889	9.1
Abbotsford, BC (CY)	12.7	16.8	489	52,381	2.6
Delta, BC (DM)	8.9	16.1	468	38,106	1.9
Vancouver, BC (CY)	2.5	0.6	17	303,965	15.1
New Westminster, BC (CY)	1.3	2.6	75	35,751	1.8
Richmond, BC (CY)	0.6	0.5	15	79,185	3.9
Burnaby, BC (CY)	0.4	0.3	8	100,030	5.0
Mission, BC (DM)	0.1	0.4	12	14,485	0.7
Kelowna, BC (CY)	0.0	0.0	0	59,332	3.0
White Rock, BC (CY)	0.0	0.0	1	10,530	0.5

Top PRIZM Segments

% of Target Group Households





Source: BCRTS 2020 – South Asian Society Overview, Market: British Columbia

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British Columbia Regional Tourism Secretariat

Boomer Bliss

PRIZM Segments Included (by SESI): 09
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Boomer Bliss rank 13th, making up 59,001 households, or 2.9% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 62, 46% of couples have children living at home
- Above Average Household Income of $141,716 compared to BC at $106,681
- **Top Social Value: Effort Towards Health** - The commitment to focus on diet, exercise and healthy living to feel better and have a healthy, wholesome lifestyle. A willingness to transform one's lifestyle through exercise and radical changes to diet
- Above average interest in Visiting Parks/City Gardens, Cycling and Bars/Restaurants
- Above average interest in travelling within Canada (Vancouver, Alberta, Ontario), Boomer Bliss from British Columbia spent an average of $1,814 on their last vacation
- On average, Boomer Bliss from British Columbia spend 14hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.3hrs/day on the Internet. Daily Magazine usage is minimal (8 min/day)
- 75% currently use Facebook, 32% use Instagram and 23% use Twitter
- EQ Type: Authentic Experiencer

Market Sizing

Total Population
Target Group: 150,767 | 3.0%
Market: 5,064,371

Total Households
Target Group: 59,001 | 2.9%
Market: 2,010,897

Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Nanaimo, BC (CY)	11.3	15.9	544	41,687	2.1
Saanich, BC (DM)	8.6	10.5	359	48,362	2.4
[illegible]	[illegible]	7.6	259	59,332	3.0
Delta, BC (DM)	6.3	9.7	332	38,106	1.9
Surrey, BC (CY)	4.8	1.6	53	183,889	9.1
North Saanich, BC (DM)	4.7	57.8	1,970	4,810	0.2
Comox, BC (T)	3.1	27.0	921	6,755	0.3
Central Saanich, BC (DM)	3.0	24.4	830	7,264	0.4
Vernon, BC (CY)	2.9	8.9	304	19,079	0.9
West Kelowna, BC (DM)	2.8	12.6	428	13,286	0.7

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Top PRIZM Segments

% of Target Group Households

09 - Boomer Bliss — 100.0



Source: BCRTS 2020 – Boomer Bliss Overview, Market: British Columbia

bcrts
British Columbia Regional Tourism Secretariat

Down to Earth

PRIZM Segments Included (by SESI): 41
Market: British Columbia

Overview

- Of the 67 PRIZM Clusters identified in Canada, Down to Earth rank 20th, making up 41,978 households, or 2.1% of the total Households in British Columbia (2,010,897)
- The Median Household Maintainer Age is 59, 46% of couples have children living at home
- Above Average Household Income of $97,322 compared to BC at $106,681
- **Top Social Value: Attraction to Nature** - How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life
- Above average interest in Camping and Visiting Parks/City Gardens
- Above average interest in travelling within Canada (Vancouver, Victoria, Alberta, Nova Scotia, Ontario), Down to Earth from British Columbia spent an average of $1,548 on their last vacation
- On average, Down to Earth from British Columbia spend 15hrs/week listening to the Radio, 21hrs/week watching TV, 1hr/week reading the Newspaper and 3.4hrs/day on the Internet. Daily Magazine usage is minimal (10 min/day)
- 81% currently use Facebook, 32% use Instagram and 21% use Twitter
- EQ Type: Rejuvenator

Market Sizing

Total Population
Target Group: 104,246 | 2.1%
Market: 5,064,371

Total Households
Target Group: 41,978 | 2.1%
Market: 2,010,897

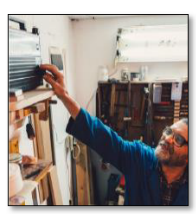
Top Geographic Markets

Census Subdivision	Target Group			Market	
	% of Group	% of Market	Index	HH Count	% of Market
Columbia-Shuswap C, BC (RDA)	4.9	57.8	2,771	3,523	0.2
Comox Valley C (Puntledge-Black Creek), BC (RDA)	3.9	43.8	2,092	3,711	0.2
Nanaimo F, BC (RDA)	3.0	36.8	1,762	3,457	0.2
Cowichan Valley B, BC (RDA)	2.1	26.3	1,258	3,318	0.2
Peace River D, BC (RDA)	1.9	35.5	1,693	2,283	0.1
Prince George, BC (CY)	1.8	2.4	113	32,172	1.6
Sunshine Coast B, BC (RDA)	1.8	58.2	2,792	1,288	0.1
Sunshine Coast D, BC (RDA)	1.8	47.1	2,256	1,568	0.1
Saltspring Island, BC (RDA)	1.5	12.3	588	4,975	0.2
Vanderhoof, BC (DM)	1.4	38.0	1,814	1,564	0.1

Top PRIZM Segments

% of Target Group Households

41 - Down to Earth — 100.0



Source: BCRTS 2020 – Down to Earth Overview, Market: British Columbia

Appendix II – CCCTMA MRDT Survey

2019 MRDT Stakeholder Survey Results

2020 MRDT Stakeholder Survey Results

2021 MRDT Stakeholder Survey Results (TBA)