



DESTINATION  
BRITISH COLUMBIA®

CARIBOO CHILCOTIN COAST TOURISM ASSOCIATION

# Annual General Meeting

NOV 3, 2022

Lillooet, Michael Bednar

# Tourism's Role in Reconciliation

The tourism industry:

- Creates opportunities for non-Indigenous people to learn more about Indigenous people and culture
- Creates opportunities for Indigenous and non-Indigenous communities and people to work together for a common purpose
- Shares British Columbia's full story, culture, heritage and diversity with the world

# AGENDA

- Where we are Today: Industry Performance & Outlook
- Work in Progress: DBC's 2023-25 Corporate Strategy
- 2020-2023 Strategy: Invest in Iconics
- Key DBC Programs
- Q&A





Petroglyphs Bella Coola/Photo: Chris Nelson

An aerial photograph of a mountain valley. A large, dark blue lake is visible at the top of the frame. The valley floor is filled with a dense forest of evergreen trees. A thick layer of white mist or fog hangs in the valley, partially obscuring the forest. The surrounding mountain slopes are covered in green vegetation and some rocky outcrops. The overall scene is serene and natural.

# 2022 Industry Performance & Outlook

# SNAPSHOT OF BC TRAVEL



## BC ACCOMMODATION OVERVIEW<sup>1</sup>

Updated OCTOBER 31, 2022  
Data for the week of OCTOBER 17, 2022

|                    | Occupancy Rate | Average Daily Rate (ADR) | RevPAR*      |
|--------------------|----------------|--------------------------|--------------|
| Current Week       | <b>75%</b>     | <b>\$205</b>             | <b>\$153</b> |
| From Previous Week | ↑ +8pts        | ↑ +7%                    | ↑ +20%       |
| From 2021          | ↑ +16pts       | ↑ +35%                   | ↑ +71%       |
| From 2019          | ↑ +4pts        | ↑ +23%                   | ↑ +30%       |



## BC AIR OVERVIEW<sup>2</sup>

Air Bookings  
to BC

Share of Air Bookings  
to BC

|                    |               |  |
|--------------------|---------------|--|
| Current Week       | <b>49,892</b> | <p>■ Domestic<br/>■ International</p>      |
| From Previous Week | ↓ -6%         |  |
| From 2021          | ↑ +15%        |  |
| From 2019          | ↓ -11%        |  |
|                    |               | Air Capacity to BC<br>(From Previous Week) |
|                    |               | ↓ -2%                                      |



## BC RESIDENT OVERVIEW<sup>3</sup>

Overnight Trip  
Intentions in BC  
(Next 4 Weeks)

Comfort Welcoming  
Overnight Travellers  
from BC

|                     |            |                   |
|---------------------|------------|-------------------|
| Current Month       | <b>20%</b> | <b>76%</b>        |
| From Previous Month | ↓ -4pts    | No change<br>0pts |

### NOTES/SOURCES

1. STR, STR Global Ltd.; \*RevPAR (Revenue per Available Room) reflects a property's ability to fill available rooms at an average rate. It is calculated by multiplying a hotel's average daily room rate by its occupancy rate.
2. Forward Keys, Air Capacity, Air Bookings with 12 month look-ahead window. Discrepancy of actuals of up to 2%, during same period, is anticipated if data is pulled at a later date.
3. Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism Wave 51, Leger, Oct 14-16, 2022. Updates available monthly.



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### CONTACT US

Research & Analytics: [TourismResearch@DestinationBC.ca](mailto:TourismResearch@DestinationBC.ca)

## SNAPSHOT OF BC TRAVEL Summer (Q2) 2022 vs. 2019



### BC ACCOMMODATION OVERVIEW<sup>1</sup>

|                          |                   | BC                     | Vancouver              | Victoria               | Kelowna                | Revelstoke             | Williams Lake          | Prince George          |
|--------------------------|-------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Occupancy Rate           | 2022<br>From 2019 | <b>81%</b><br>↓ -4pts  | <b>88%</b><br>↓ -5pts  | <b>82%</b><br>↓ -6pts  | <b>79%</b><br>↓ -10pts | <b>78%</b><br>↓ -7pts  | <b>92%</b><br>↑ +5pts  | <b>73%</b><br>↑ +5pts  |
| Average Daily Rate (ADR) | 2022<br>From 2019 | <b>\$270</b><br>↑ +16% | <b>\$359</b><br>↑ +13% | <b>\$308</b><br>↑ +21% | <b>\$264</b><br>↑ +18% | <b>\$195</b><br>↑ +13% | <b>\$137</b><br>↑ +18% | <b>\$132</b><br>↑ +12% |



### BC AIR OVERVIEW<sup>2</sup>

|           | Air Bookings to BC | Domestic to BC | US to BC       | Int'l to BC    |
|-----------|--------------------|----------------|----------------|----------------|
| 2022      | <b>1.2 M</b>       | <b>0.577 M</b> | <b>0.218 M</b> | <b>0.387 M</b> |
| From 2019 | ↓ -24%             | ↓ -2%          | ↓ -15%         | ↓ -45%         |

### Share of Air Bookings to BC



### Air Capacity to BC

|           |              |
|-----------|--------------|
| 2022      | <b>3.6 M</b> |
| From 2019 | ↓ -10%       |



### BC RESIDENT OVERVIEW<sup>3</sup>

|            | Overnight Trip Intentions in BC (Next 2-3 Weeks) | Comfort Welcoming Visitors to BC |                |            |            |
|------------|--|----------------------------------|----------------|------------|------------|
|            |  | (BC Overnight)                   | (Other Canada) | (US)       | (Int'l)    |
| BC         | <b>53%</b>                                       | <b>73%</b>                       | <b>63%</b>     | <b>39%</b> | <b>36%</b> |
| VCM        | <b>48%</b>                                       | <b>68%</b>                       | <b>59%</b>     | <b>36%</b> | <b>33%</b> |
| VI         | <b>58%</b>                                       | <b>78%</b>                       | <b>65%</b>     | <b>40%</b> | <b>41%</b> |
| TO         | <b>63%</b>                                       | <b>80%</b>                       | <b>65%</b>     | <b>43%</b> | <b>32%</b> |
| Rest of BC | <b>57%</b>                                       | <b>77%</b>                       | <b>69%</b>     | <b>48%</b> | <b>44%</b> |

### SOURCES/NOTES

CCC = Cariboo Chilcotin Coast, KR = Kootenay Rockies, NBC = Northern BC, TO = Thompson Okanagan, VCM = Vancouver, Coast & Mountains, VI = Vancouver Island.

1. STR, STR Global Ltd.; August 2022 vs August 2019

2. Forward Keys; Air Capacity, non-stop, July/August 2022; Air Bookings, Ticketing July 1, 2021 to September 25, 2022, Arrivals July 1, 2022 to March 31, 2023.

3. Destination BC's BC Residents' Public Perceptions: COVID-19 Travel and Tourism; July/August 2022

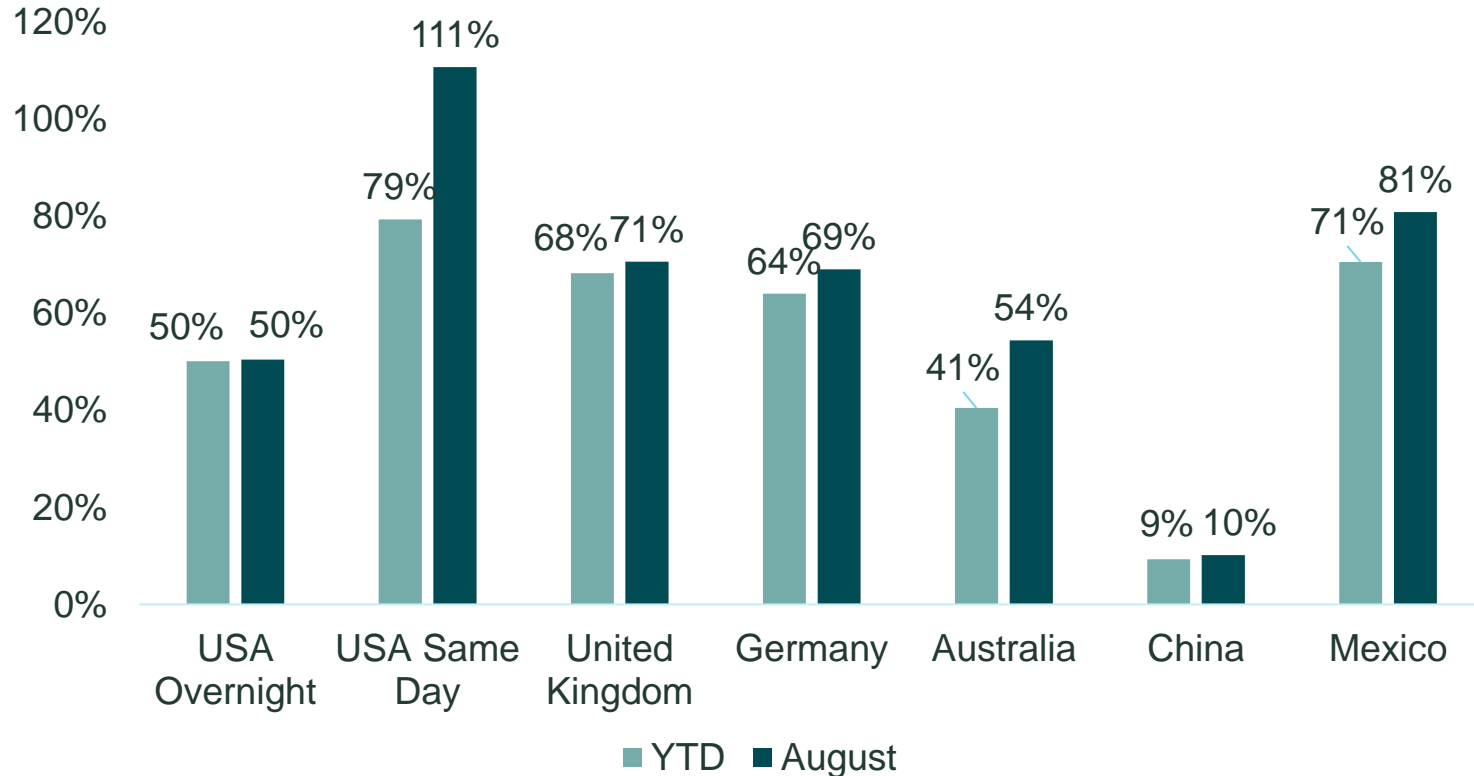


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### CONTACT US

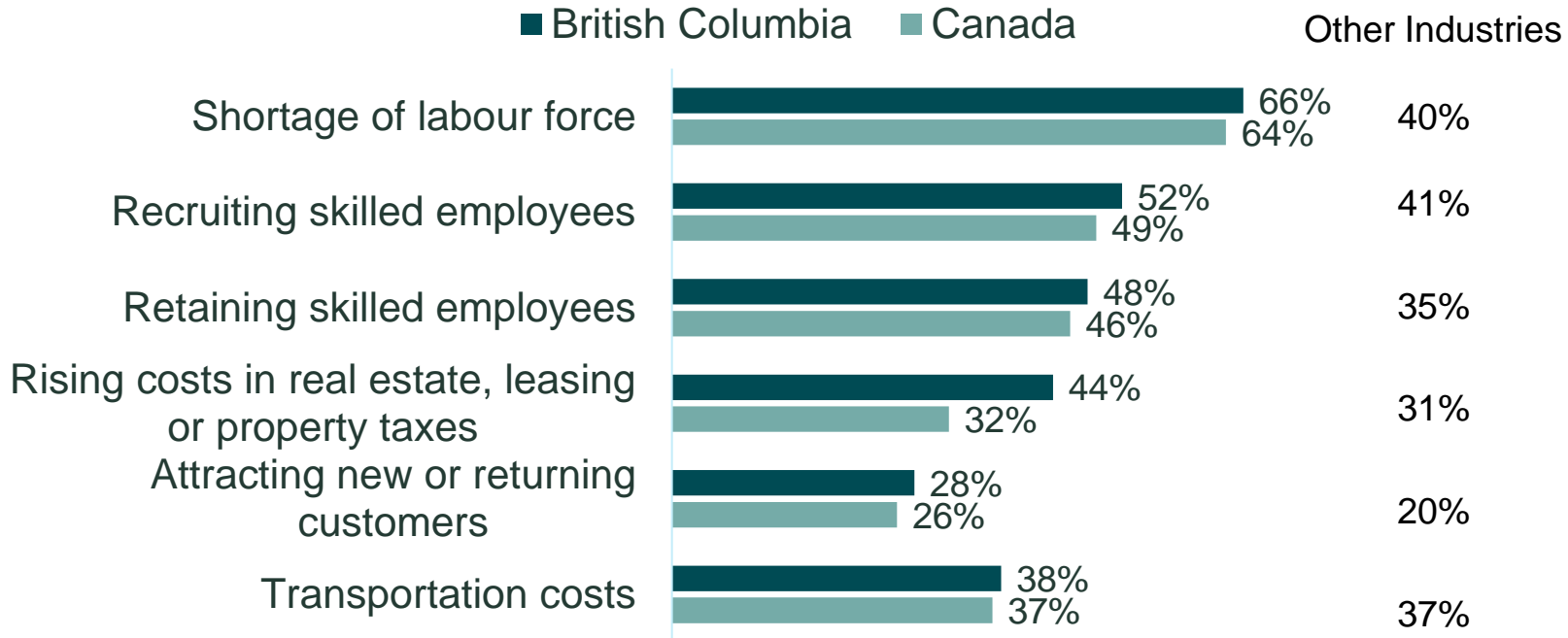
Research & Analytics: [TourismResearch@DestinationBC.ca](mailto:TourismResearch@DestinationBC.ca)

# International Entries (% of 2019)





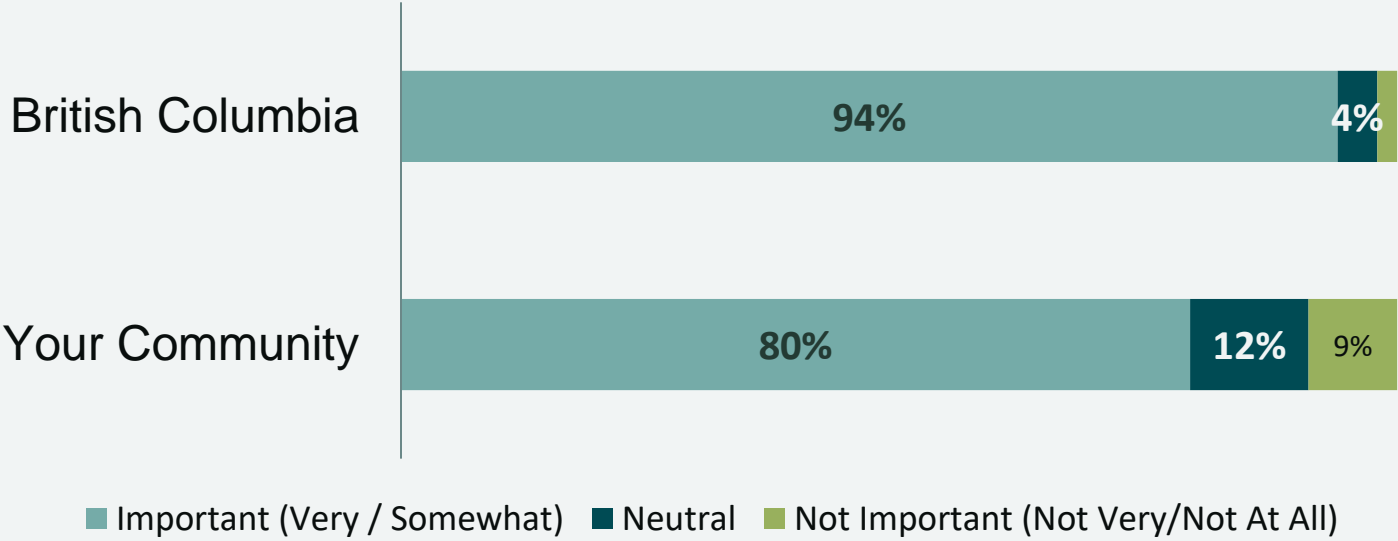
# Business Challenges: Accommodation and Food Services Sector vs. All Industries



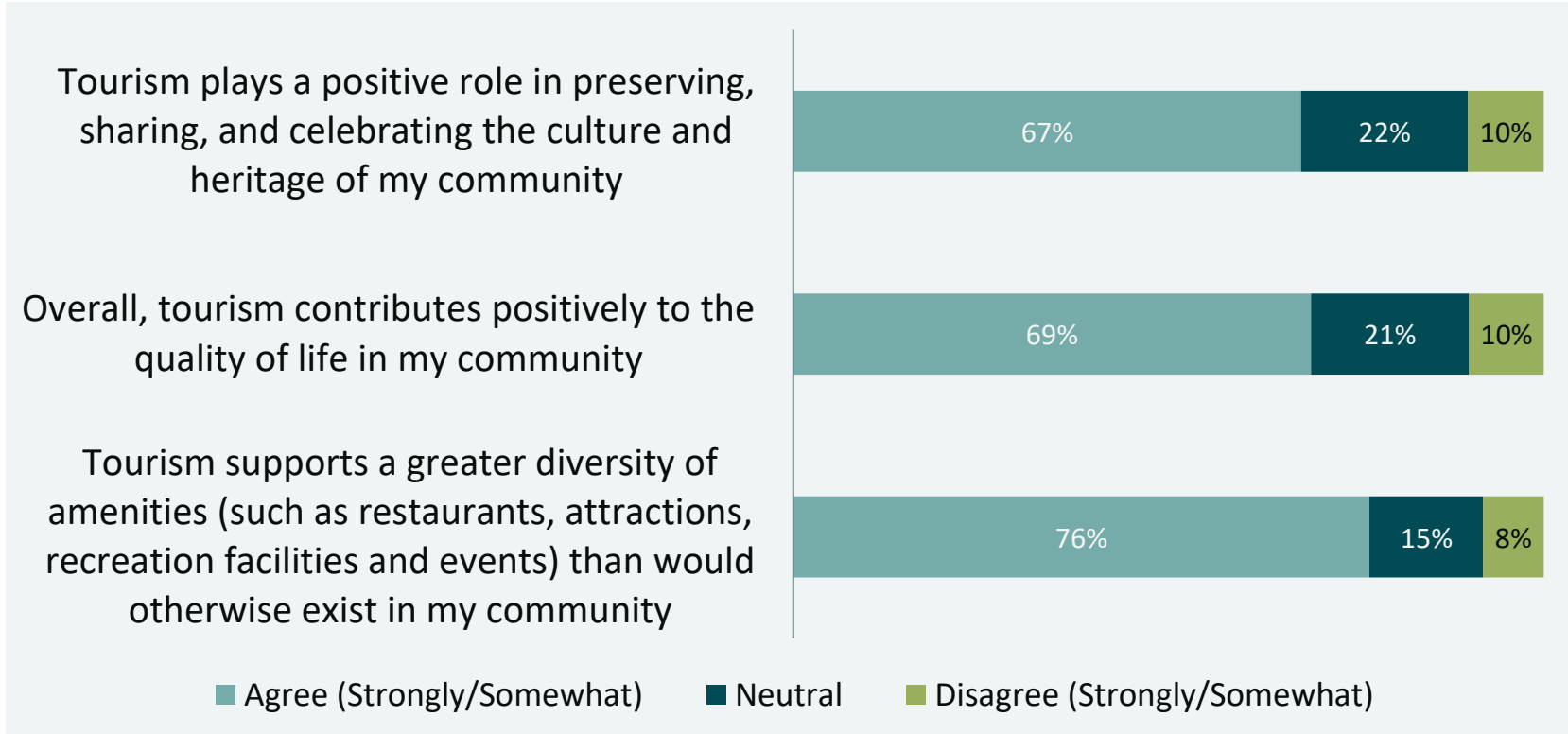
**Source:** Statistics Canada. Table 33-10-0534-01 Business or organization obstacles over the next three months, third quarter of 2022

# BC Resident Perceptions of Tourism

## How Important Is Tourism To British Columbia's Economy?



# BC Resident Perceptions of Social/Cultural Impacts

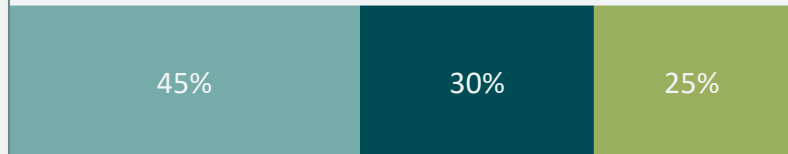


# BC Resident Perceptions of Environmental Impacts

The tourism industry uses more locally produced goods, services and agricultural products than most other industries



The tourism industry contributes to the protection, conservation and/or preservation of biodiversity and local landscapes



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

# BC Residents: Interest in Indigenous Experiences

I am interested in participating in tourism experiences about the Indigenous culture and heritage in British Columbia



I am aware of Indigenous tourism experiences and/or businesses in British Columbia



Tourism has increased awareness and recognition of Indigenous culture and heritage in British Columbia



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

# BC Residents' Support for Tourism

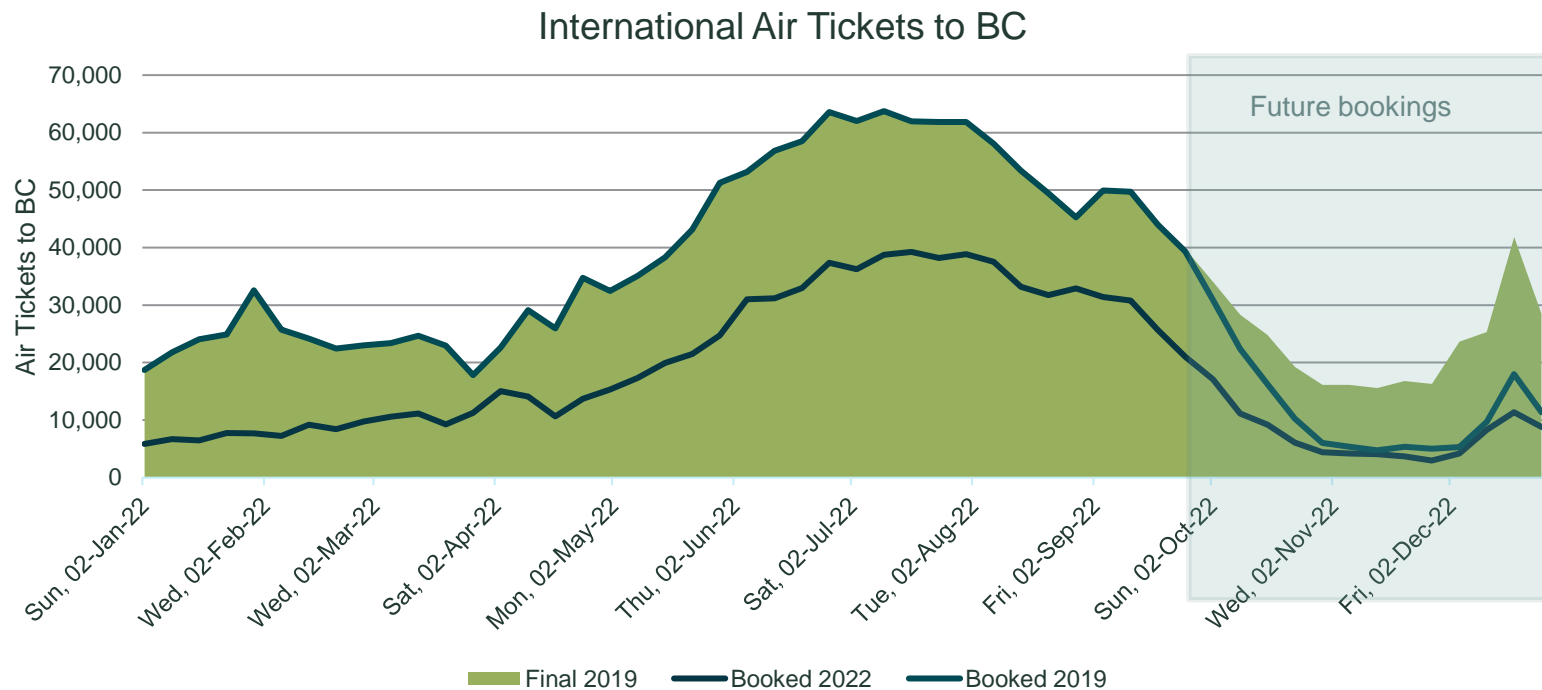


■ More ■ About the Same ■ Less ■ Don't Know/Not Sure



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

# Looking Forward: International Air Travel to BC



**Source:** Forward Keys Air tickets to BC, As of September 26, 2022 compared to bookings at September 28, 2019

# Tourism Industry Performance: 2022 Forecast



| Market                 | 2019     | 2022 forecast | % change from 2019 |
|------------------------|----------|---------------|--------------------|
| Canada Overnight       | \$7.9 B  | \$8.8 B       | 12%                |
| British Columbia       | \$4.4 B  | \$4.9 B       | 12%                |
| Alberta                | \$1.6 B  | \$1.9 B       | 22%                |
| Ontario                | \$1.3 B  | \$1.4 B       | 9%                 |
| US Overnight           | \$2.6 B  | \$1.3 B       | -49%               |
| Asia/Pacific Overnight | \$1.9 B  | \$0.5 B       | -71%               |
| Europe Overnight       | \$1.0 B  | \$0.6 B       | -42%               |
| Total                  | \$13.4 B | \$11.2 B      | -16%               |

Note: Revenue forecast, not visitation. Spend per overnight visitor is up  $\pm$  10%



# 2023 Outlook Coming Soon ...

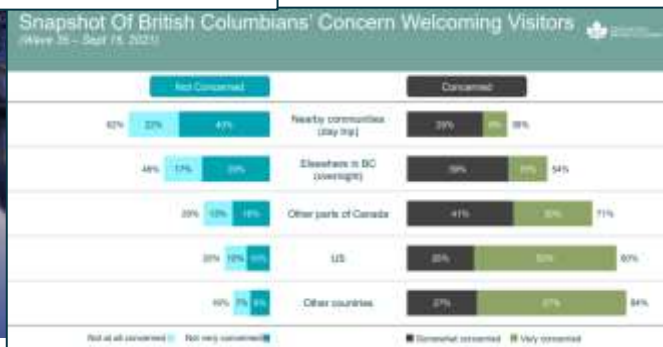


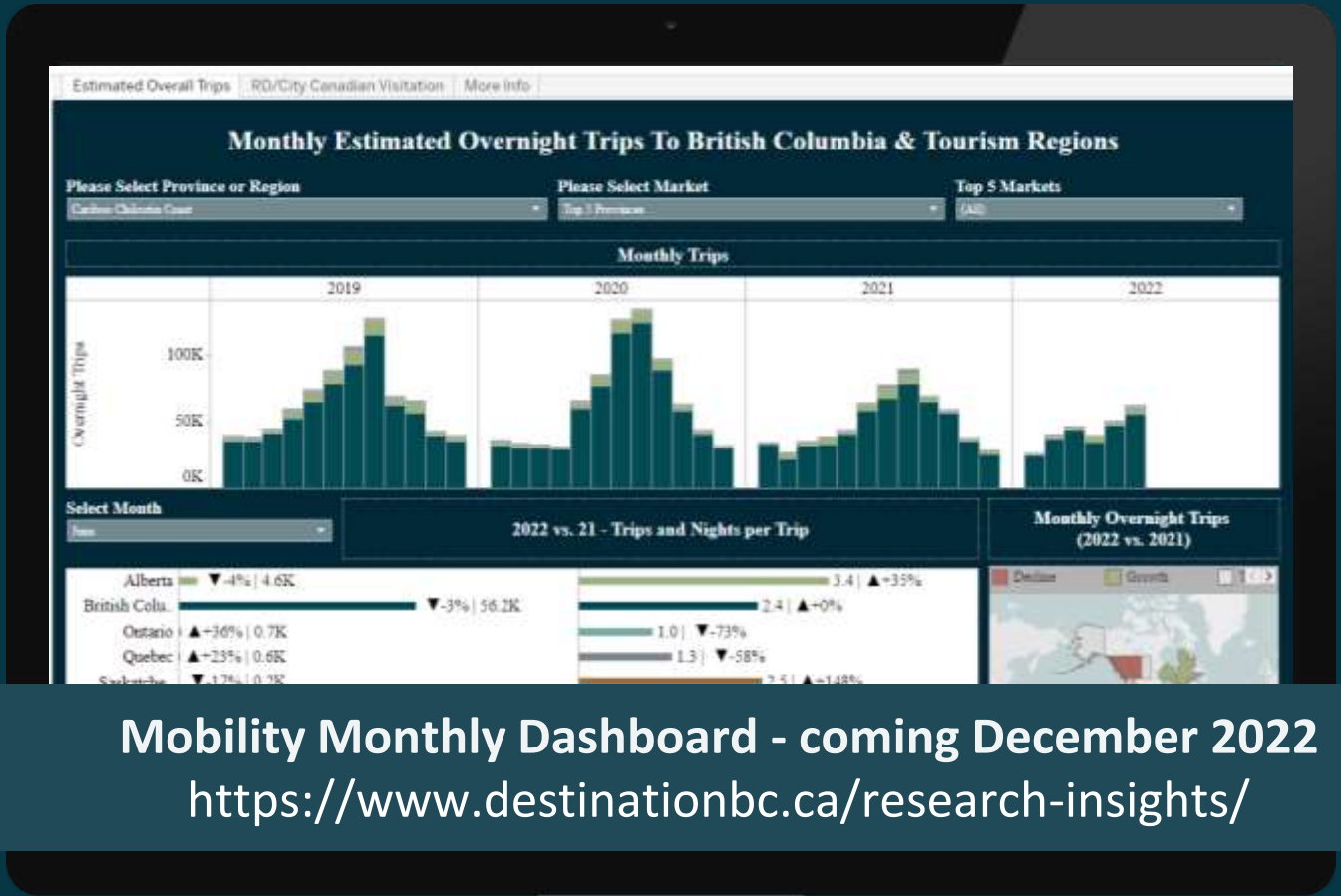
- Recession?
- Snow?
- COVID?
- Exchange rates?
- Labour?
- .....



- Canada: stable (mild recession, exch rates)
- US: growth (continued recovery & exch, rates vs. mild recession)
- Europe: slow growth (recovering vs. negative economic conditions)
- Australia: continued recovery
- China: not yet ...

# DBC Research Resources ....





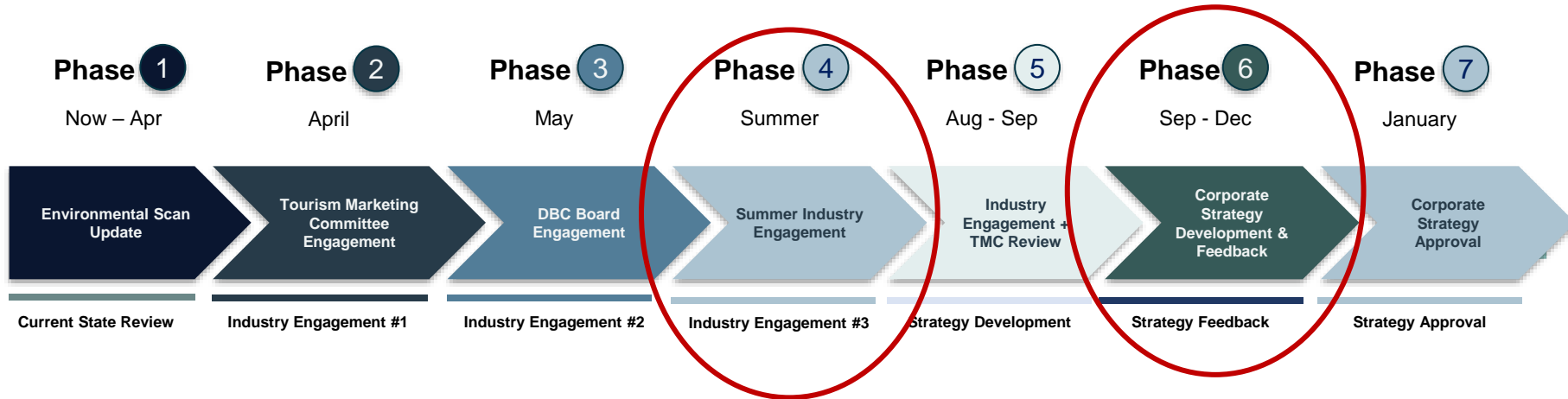
**Mobility Monthly Dashboard - coming December 2022**  
<https://www.destinationbc.ca/research-insights/>

# Toward DBC's Next Corporate Strategy



Wilderness Lake, DBC/Kari Medig

# DBC 2023-2025 Corporate Strategy: Process Overview



## Phase 6:

- Board review and guidance: October 26
- Key partner engagement Sept. 20 – Nov. 30
- TMC review: November 15
- Draft Strategy for Board review: Dec. 8.
- Final(?) draft to Board January 26<sup>th</sup>, 2023

# What We Heard ...

## Summer Roadtrips:

- 14 industry feedback trips
- 200+ individuals provided input
- Feedback provided by sector and community DMOs, local governments, First Nations & other organizations



# What We Heard: Grouping of Key Themes

## GROUP 1: Destination Marketing & Enhancement



**MARKET MIX**



**ELEVATED  
DD + ED**



**RESPONSIBLE +  
RESPECTFUL  
VISITORS**

## GROUP 2: Indigenous Tourism



**INDIGENOUS  
TOURISM/RECONCILIATION**

## GROUP 3: Tourism Measurement

Related



**DATA TO MANAGE  
TOURISM**



**RETHINKING  
SUCCESS**



**VALUE OF  
TOURISM**

## GROUP 4: Training & Communications



**DEVELOPMENT +  
TRAINING**



**EMERGENCY  
MNG'T**



## GROUP 5: Government Policy



**ACTION ON  
CLIMATE CHANGE**



**GOV'T + ECO-  
SYSTEM**



**BALANCE DMO  
INVESTMENTS**



**RURAL ECONOMIC  
DEVELOPMENT**

## GROUP 6: Workforce



**WORKFORCE  
REALITIES**

# Implications for DBC?

- Tighter integration of destination marketing & management
- Stronger collaborations and shared tools, technology, training, data, insights, etc.
- Values informed strategies & tactics (Reconciliation, Inclusion, Sustainability, Equity..)



**Coming Soon?**



An aerial photograph of a deep, forested valley. The valley floor is covered in a dense, vibrant green forest. The surrounding cliffs are dark and rocky, with some sparse vegetation. In the distance, more forested hills are visible under a cloudy, overcast sky. The overall scene is dramatic and scenic.

# Destination BC's 2020-2023 Strategy

# 2020 – 2023 Strategy: Goals



# Key Pillars



**Invest in  
Iconics**



**Integrated  
Industry**



**Destination  
Stewardship**



# INVEST IN ICONICS















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TOURISM BC  
CORPORATE

# The Proposed Places and Routes

| West Coast   | Southern Valleys   | Rockies to Rainforest  | Southeast BC   | The North  | Central BC Route   |
|--|--|--|--|--|--|
|               |               |               |                |               |               |
| Iconic Place  | Iconic Place  | Iconic Route  | Iconic Place  | Iconic Place  | Iconic Place  |



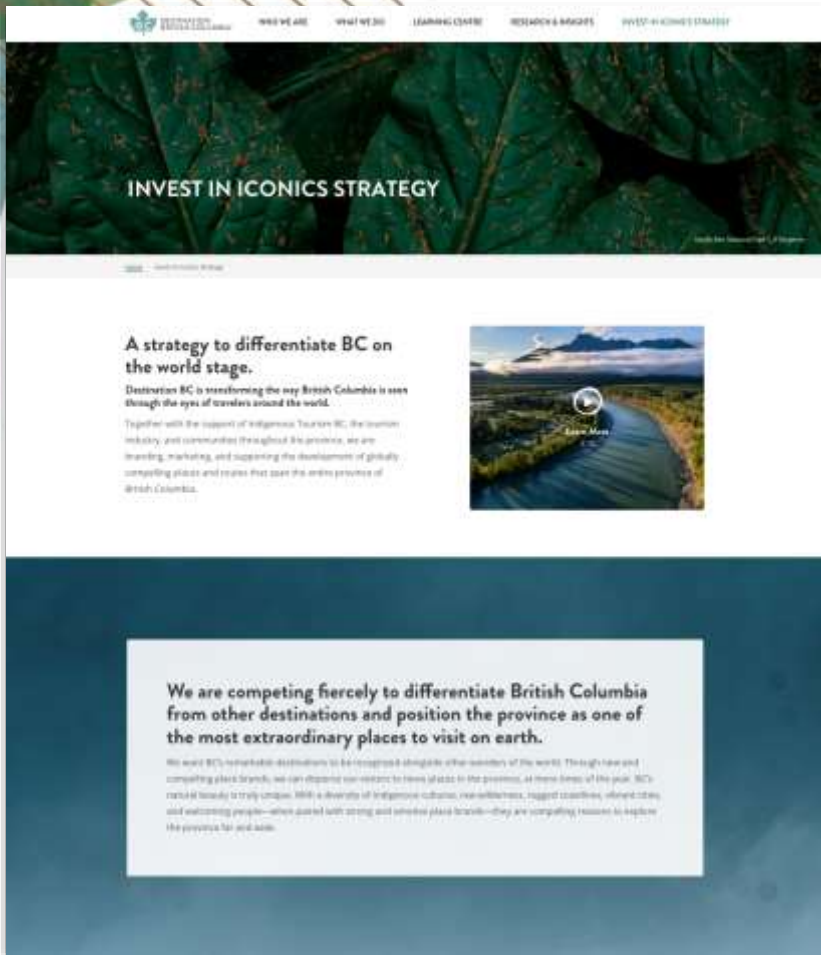
◀ • SEASONAL DISPERSION • ▶

◀ ..... GEOGRAPHIC DISPERSION ..... ▶

*\*Internal Working Titles Only*

# Timelines





Learn more



[DestinationBC.ca/Iconics](https://DestinationBC.ca/Iconics)





# (Some) Key DBC Programs



# Marketing

A young man and woman are smiling and looking at each other while sitting on a yellow boat. The boat is on a river with a forested background. The boat has the text "CARBON NEUTRAL ADVENTURE" written on its side. A driver is visible in the cockpit of the boat.

FIND YOURSELF

A hiker with a red backpack stands on a rocky ridge overlooking a vibrant turquoise lake and majestic snow-capped mountains. The scene is a breathtaking landscape with rugged peaks and a clear sky.

FIND  
YOURSELF  
IN EVERY  
SENSE

# BC EFFECT



FIND  
YOURSELF,  
IN EVERY  
SENSE



YOU, ELEVATED



A person wearing a bright orange jacket and dark pants stands on a rocky outcrop, looking out over a vast, rugged mountain range. The mountains are covered in patches of snow and have sharp, jagged peaks. The sky is overcast with grey clouds. The overall scene is one of a high-altitude, mountainous landscape.

# ITBC-DBC Partnership: Illahee videos



# Government Investment in Destination Development



**\$58M** invested  
in the Cariboo  
Chilcotin Coast  
region





- Nemiah Valley Lodge: cultural experiences of the Xeni Gwet'in people
- Bella Coola/Kimsquit Ooligan Grease Trail: Nuxalk Nation working to re-establish, restore and maintain



Bella Coola, Destination BC/Callum Snape

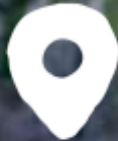


**GET IN TOUCH: [DestinationDevelopment@DestinationBC.ca](mailto:DestinationDevelopment@DestinationBC.ca)**

# Visitor Centre Network Members



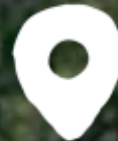
**100 Mile House**



**Lillooet**



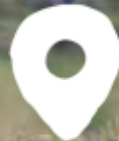
**Williams Lake**



**Bella Coola**



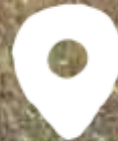
**Quesnel**



**Gold Bridge**

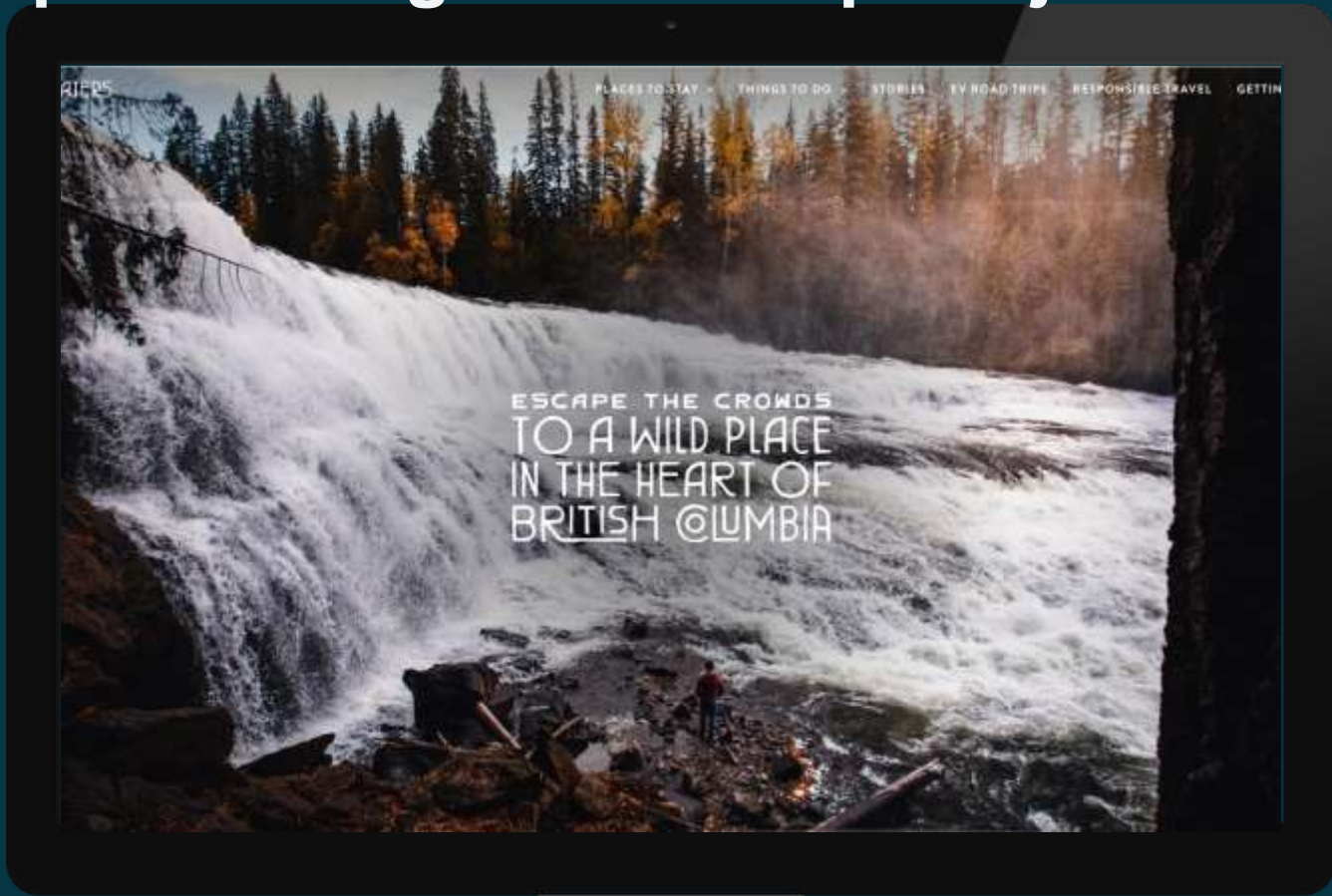


**Wells**



**Horsefly**

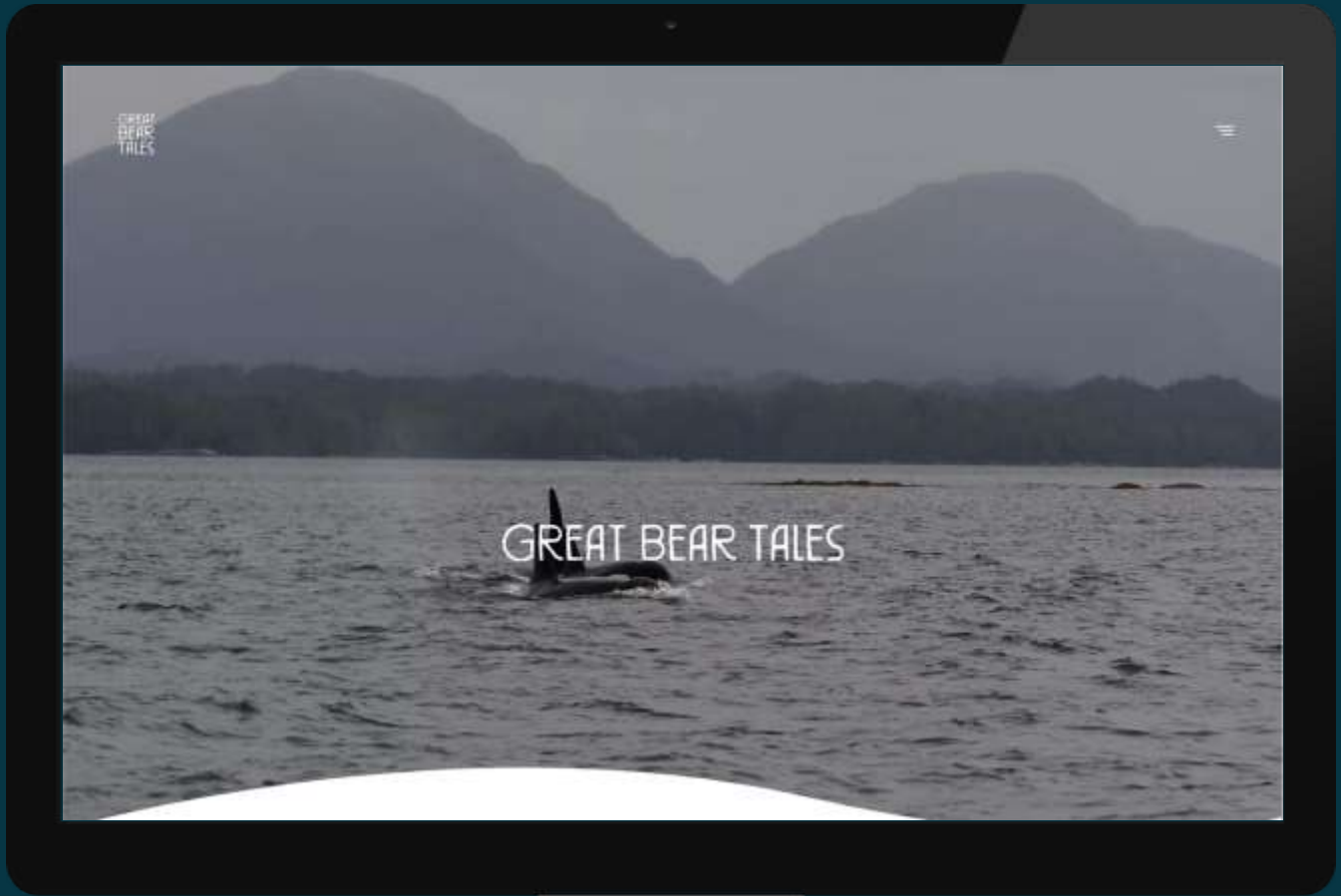
# Co-op Marketing Partnership Projects

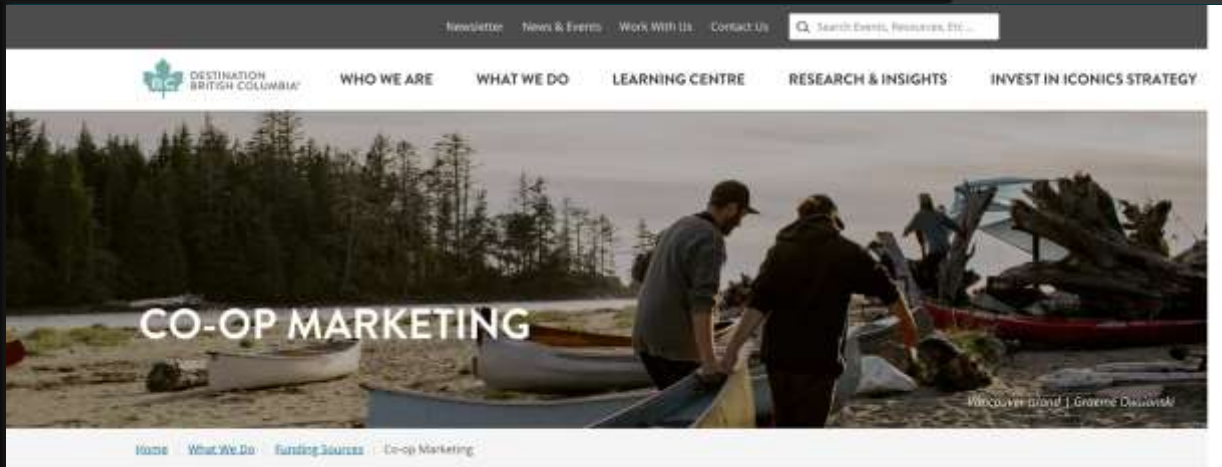




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**APPLY for a Co-op Project: [coop@DestinationBC.ca](mailto:coop@DestinationBC.ca)**



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**THE VALUE OF TOURISM  
TO BRITISH COLUMBIA**

**THANK YOU**

