



Growing Tourism Visitation to the Cariboo Chilcotin Coast

A TOURISM PLAN FOR MRDT IN THE CARIBOO CHILCOTIN COAST
2018 - 2022

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Foreword

This Tourism Plan has been developed through significant industry stakeholder consultation and engagement over a three-month period of October - December 2013, a six-month period between October 2015 and March 2016, and review and update May 2017 including:

- Meetings at the annual Cariboo Chilcotin Coast Tourism Association Summit and AGM in Shearwater, Denny Island.
- Input from the Cariboo Chilcotin Coast Tourism Association Board of Directors.
- Community meetings in Williams Lake, Quesnel, Lillooet, Clinton and 100 Mile House.
- Extensive outreach and discussions with individual tourism businesses and stakeholders throughout the region (including Bella Coola and West Chilcotin).
- A survey distributed to all stakeholders in the Cariboo Chilcotin Coast Tourism Association newsletter list (approximately 467) as well as identified PST/MRDT-eligible accommodations within the Cariboo Chilcotin Coast region (approximately 150).
- Input from Destination BC.

In total over 150 people participated in one or more of the above. This plan and the goals, objectives, strategies and actions described below are based on input from these sessions as well as from a situation analysis review, and One Year Tactical Plan (2018) enclosed within.

This plan is intended to be a working document for the industry to embrace and evolve, in order to provide guidance to the newly formed MRDT Marketing Committee.



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1 Executive Summary

Tourism performance overall within the Cariboo Chilcotin Coast (CCCTA) tourism region is believed to have become relatively static, with consistent issues and opportunities but little significant leaps forward. Research has shown a key barrier to growth is the relatively lower levels of familiarity (and by extension, favourability) of the Cariboo Chilcotin Coast tourism region in comparison to other BC regions for its key markets.

There is identified opportunity for growth, however currently the tourism industry within the region has limited funds with which to capture these opportunities. Consequently, the region has become less competitive to other tourism regions in BC who have more significant funds and resources. Heightened and accelerated marketing efforts are required to substantially shift the status quo.

The following activities are determined to be important to significantly provide growth within the region and level the playing field for the region compared to other regions:

MARKETING

1. Invest in approved third-party rights usage media, including video b-roll and still images on behalf of all stakeholders, communities and product experiences in the region.
2. Increase regional branded marketing activities to increase awareness, interest and conversion from existing short-haul and International markets.
3. Support the development and promotion of key travel corridors to the region, for example the Gold Rush Trail.
4. Fully utilize the Destination BC Open Pool funds to extend the reach and impact of marketing activities within existing markets for communities within the region.
5. Deliver targeted marketing campaigns to drive increased room occupancy and rates.

REMARKABLE EXPERIENCES

6. Support a warm welcome and quality experience for visitors, through increased training of frontline and visitor information centre staff.
7. Advocate to improve the transportation system to provide more convenient, affordable travel to and throughout the region, including road, rail, air and ferry access.
8. Develop a signage strategy to improve marketing of off-highway routes.

TOURISM MANAGEMENT

9. Increase funding to enable an increase in destination development and marketing activities.
10. Secure dedicated resources to assist with executing and evolving the plan and ensuring stakeholder engagement.
11. Ensure stakeholders are engaged in the evolution and execution of the plan.
12. Implement research and performance monitoring and evaluation to guide business decision making.



DESTINATION AND INDUSTRY DEVELOPMENT

13. Support the development of tourism assets and product experiences throughout the region.
14. More fully support and enhance the development of the tourism industry knowledge and business effectiveness throughout the region.

A critically important strategy is the procurement of new funding resources to increase available marketing dollars, which are required to enable these new activities. A review of potential funding options led to the determination that multiple funding sources should be pursued, including the collection of the 3% MRDT funding throughout the entire region, an option brought forward by tourism accommodators and communities over the last few years.

PENDING



2 Background

Currently the Cariboo Chilcotin Coast Tourism Association (CCCTA) operates via annual business plans approved by the Board of Directors. A review of the 2011-2015 business reviews revealed the region was operating within a status quo situation, despite best efforts to continue to improve the effectiveness of the organization and its destination marketing and management activities.

An internal review showed other areas within BC were better able to develop and market their region due to the availability of more significant funds, due primarily to two factors: more tourism businesses were able to participate in cooperative marketing programs and more communities and regional districts within those regions collected and utilized Municipal and Regional District Tax (MRDT) funding.

Concurrently, accommodation operators within the Cariboo Chilcotin Coast (CCC) were making repeated requests to review the viability of MRDT collection on a regional basis.

This plan has been created to identify the activities that would provide a significant difference to the tourism industry within the region, ensuring positive growth and an evolution from the status quo. In order to afford these activities, funding options were reviewed, including the MRDT.

It is important to note this plan is not meant to replace the current operations, plans and budgets of the CCCTA, but be in addition to them in order to provide a significant increase in tourism marketing activities and budgets.

3 Situation Analysis

3.1 Global and BC Operating Environment

This section provides an overview of the global and BC operating environment. Local context is provided on the Cariboo Chilcotin Coast tourism region in the following section.

Tourism is a critical sector within BC's economy¹:

- In 2015, the tourism industry generated \$15.7 billion in revenue, a 5.3% increase over 2014, and a 37.5% increase from 2005.
- The tourism industry contributed \$7.4 billion of added value to the BC economy in 2015, as measured through GDP (in 2007 constant dollars). Tourism contributed more to GDP than each of the other primary resource industries. GDP contributions of the tourism sectors were similar to their shares of total tourism revenue.

¹ Source: Value of Tourism in 2015; Destination BC <http://www.destinationbc.ca/Research/Industry-Performance/Value-of-Tourism.aspx>

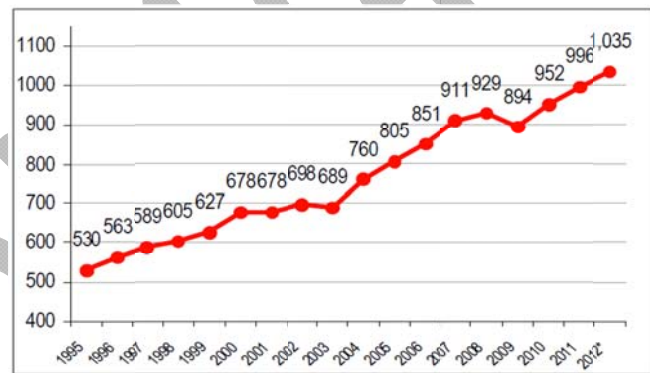


- \$1.5 billion of accommodation room revenue was earned in communities with the Municipal Regional District Tax (MRDT), an increase of 1.6% from 2011. Since the implementation of 3% in many communities since the fall of 2015, MRDT revenues are forecast to significantly increase.
- In 2015, there were 18,938 tourism-related businesses in operation in BC, an increase of 1.4% over 2014. There were 127,700 people employed, a 1.2% increase over 2014 and a 16.0% increase since 2005. In 2015, the tourism industry paid \$4.5 billion in wages and salaries, up 4.0% from 2014.

The following provides an overview of the current tourism operating environment:

- Global 2012 International tourist arrivals grew by 4% to reach 1,035 million worldwide, up from 996 million in 2011. In the long-term, the UNWTO forecasts that international tourism arrivals will increase from 1.01 billion in 2010 to 1.56 billion in 2020. The UNWTO's projected average annual growth rate for global travel from 2010 to 2020 is 4.5%. For the America's (North and South), the UNWTO forecasts international tourism arrivals will increase from 190 million in 2010 to 282 million in 2020. The projected average annual growth rate from 2010 to 2020 is 3.9%. With a ten-year positive outlook on International tourism arrivals, the take away message is that tourism is expected to continue to be a strong, healthy industry globally over the next decade, although the America's will show lower-than-average growth rates.²

World Inbound Tourism International Arrivals (millions)



Source: UNWTO World Tourism Barometer Jan 2013

- There is expected to be continued increasing competition for the global tourist dollars as more destinations are seeing the economic benefits of tourism and are aggressively trying to attract travellers. In particular, there has been an increase in the competitive efforts from international destination to lure Canadian's abroad.
- There is an increase in the number of potential travelers as more consumers around the world—in particular baby boomers and emerging markets such as China, India, Russia and Brazil—have the resources and inclination to travel. China, India, Mexico and Brazil have been identified as emerging markets for BC.
- Destination Canada has an approximately \$40 million budget (depending on government appropriation) for marketing Canada to the key international markets. The focus in 2013 was on driving leisure travel business from Canada's top ten overseas markets (UK, France, Germany, Australia, Japan, China, Mexico, South Korea, Brazil, the US and India), as well as MC&IT business from the US, the UK, France, Germany and Belgium.
- Canada received Approved Destination Status from China in December, 2009. The provincial government highlights China as a key strategic focus within the original 2012-2016 and in the updated 2015-2018 *Gaining the Edge* Tourism Strategic Plan (see http://www.jtst.gov.bc.ca/tourismstrategy/documents/GainingTheEdge_2015_2018.pdf).

² Source: World Tourism Organization Tourism 2020 Vision; www.unwto.org/facts/eng/vision.htm



- The 2010 Olympic and Paralympic Games drew incremental awareness of British Columbia as a destination, which provided benefit specifically to the Cariboo Chilcotin Coast as well.
- Within North America the economic recovery from the 2008 global recession and resulting fluctuations in consumer confidence continue to impact travel, however many destinations are reporting a return to pre-recession travel and decision making patterns.
- The general decline in visitations from the US travel market to BC continues to impact many BC destinations; however, 2013-2015 has shown signs of increased growth from the market.
- Budget cuts for Destination Canada led to reduced marketing activities in the US market. In December, 2013 they announced some re-investments into the US through the City Pairs Program and hunting & fishing. Also, they announced an increased investment in 2014 for Canadian youth markets and luxury experiences. For the spring of 2016 Destination Canada announced the new Connecting America program which will invest \$19 million into 12 US cities over two years, partnered with provinces, including Destination BC.
- Border security continues to provide challenges with facilitating quick, easy crossing through Canadian borders.
- There are continued challenges with ensuring affordable, convenient air access to and throughout BC.
- Increasing gas prices impact consumer travel decisions.
- In July, 2010 the HST tax system was introduced and subsequently rescinded, with BC going back to the PST/GST model in 2013.
- Provincial Destination Management Organization (PDMO) structure(s) and government funding for tourism marketing is shifting with Destination BC (DBC) re-created as a Crown Corporation in April 2013 to manage provincial destination marketing.
- DBC is governed by a Board of Directors as well as a 21-member Tourism Marketing Committee (plus three DBC internal members). The CCC region has three representatives appointed to the marketing committee. The Tourism Marketing Committee will provide DBC's Board of Directors and CEO with input and recommendations on tourism marketing strategies, tourism performance indicators, ways to encourage alignment in tourism marketing activities, and ways to leverage funds for tourism marketing programs. Currently the representatives are: Amy Thacker (CEO, CCCTA), Pat Corbett (Past Owner, The Hills Health Ranch), and Andre Kuerbis (Owner, AFK Business Consulting and Services).
- According to the B.C. Tourism Labour Market Strategy, there are pending labour shortages for tourism throughout BC. There is a requirement for 101,000 jobs by 2020; 44,000 new jobs, 71,000 job replacements (see www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx).
- There are continued challenges with increasing BC Ferry fares and declining ridership. In November, 2013 the provincial government announced the elimination of Route 40 from Port Hardy to Bella Coola and service reductions on other routes throughout the system. These service reductions have had a significant impact of volume in the Cariboo Chilcotin Coast. Premier Clark announced in September 2016 a new direct Port Hardy to Bella Coola ferry service will commence in 2018.
- There has been a growth in the awareness and availability of aboriginal tourism experiences throughout BC.
- There has been an increase in competitive destinations within BC. Over 150 BC communities participated in the now defunct DBC Community Tourism Foundations (CTF) program, many of them actively marketing themselves as tourism destinations. In addition, there are 53 areas collecting the MRDT in BC – either Municipalities or Regional Districts. The following chart



shows the approximate amount collected for each region. It is important to note the significantly fewer resources available to the CCCTA region at \$6,500 compared to other regions, which reached over \$17,000,000 in 2012 (see Figure 1).

Figure 1: Estimated MRDT Collected by Region - 2012

REGION	AMOUNT
Vancouver, Coast & Mountains	\$17,000,000
Vancouver Island	\$4,000,000
Thompson Okanagan	\$3,700,000
Kootenay Rockies	\$1,500,000
Northern BC	\$900,000
Cariboo Chilcotin Coast	\$6,500

Source: Destination BC, Community Tourism Foundations

For a complete list of the areas collecting MRDT as of 2017, please see Appendix A.

3.2 Local Context

British Columbia's "Land Without Limits" includes the diverse landscape of three distinct worlds – deserts and sandstone canyons; evergreen timberlands, deciduous woodlands and forests; and ocean fjords, alpine mountains and glaciers.

The population, the smallest resident population compared to other tourism regions, primarily live in the small cities and towns in the eastern area of the region, including Lillooet, Wells, Clinton, Quesnel, Williams Lake and 100 Mile House.

According to the Cariboo Chilcotin Coast Regional Tourism Profile, in 2012 overnight tourism in British Columbia generated 17.9 million person-visits and \$8.6 billion in related spending.

The Cariboo Chilcotin Coast, one of six tourism regions in the province, received 549,000 overnight person-visits in 2012 representing 3% of provincial overnight visitation. The region generated over \$118 million in related spending representing 1% of provincial related spending.³

The following charts show relevant statistics from 2011 and 2012 for the region and the tourism industry (see Figure 2).

³ Source: Destination BC Research Services, <http://www.destinationbc.ca/Research/Research-by-Region/Cariboo-Chilcotin-Coast.aspx#.UjSopvIrZes>



Figure 2: Cariboo Chilcotin Coast Regional Statistics

The region	2011	% change (2006-11)	Age groups ¹	2011	% change (2006-11)
Population ¹	65,598	0.3%	0-19 years	23%	-8%
Population as % of BC	1%	+0.1 point change	20-44 years	27%	-8%
Avg annual earnings (2006) ²	\$23,929	n/a	45-64 years	34%	6%
Unemployment rate ³	8%	+2 point change	65+ years	16%	21%

Tourism industry	2012	% of BC
Businesses (2011) ⁴	354	2%
Employment (2011) ⁴	1,491	1%
Accommodation sector revenue (\$000s) ⁴	\$53,310	2%
Room revenue (\$000s) ⁴	n/a	n/a
Campsites		
Private/municipal ⁵	1,964	8%
Provincial ⁶	789	6%
National ⁷	0	0%
Custom entries ⁸	-	0%
Visitor centre parties ⁹	39,906	3%

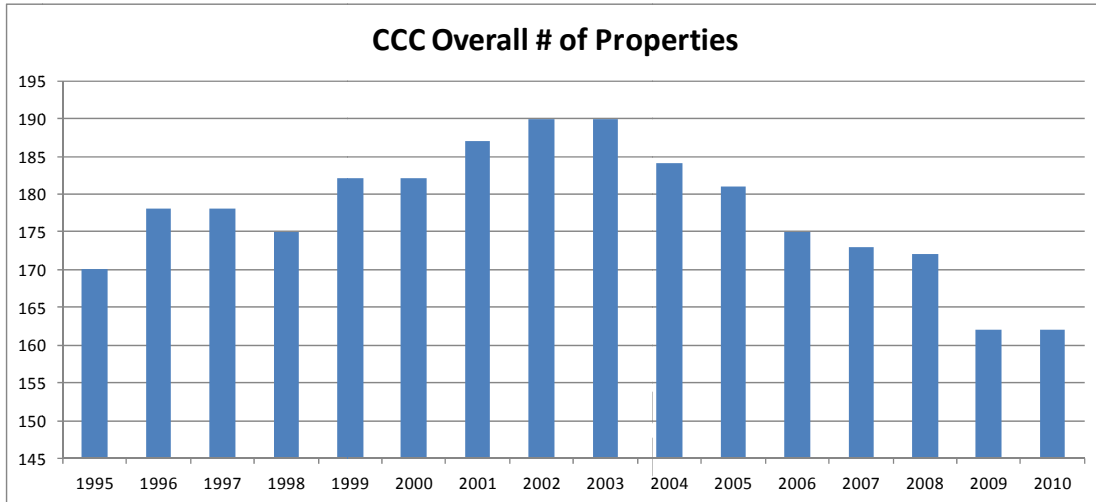
Transportation	2012	% change (2011-12)
Airport passengers ¹⁰		
Quesnel (2011)	14,095	9%
Williams Lake (2011)	35,325	16%
BC Ferries passengers ¹¹		
Route 40	6,949	6%
Highway traffic volume (000s) ¹²		
Route 20	51	-16%
Route 97	1,049	3%

Source: Destination BC Research Services; Cariboo Chilcotin Coast Regional Tourism Profile, April 2013. Original sources: 1. 2011 Census, Statistics Canada; 2. 2006 Census, Statistics Canada; 3. BC Stats; 4. Tourism Statistics, BC Stats; 5. Destination BC; 6. BC Parks; 7. Parks Canada; 8. Statistics Canada; 9. Destination BC; 10. Individual airports; 11. BC Ferries; 12. BC Ministry of Transportation.

Since a high in 2003, the CCC has seen a reduction in the number of accommodation properties from 190 to 162, a decline of 17% (see Figure 3). This has been partially due to the economic downturn and loss of US markets, but also the Relief Act, which makes it costly to operate and difficult to sell to a buyer looking for a tourism business.



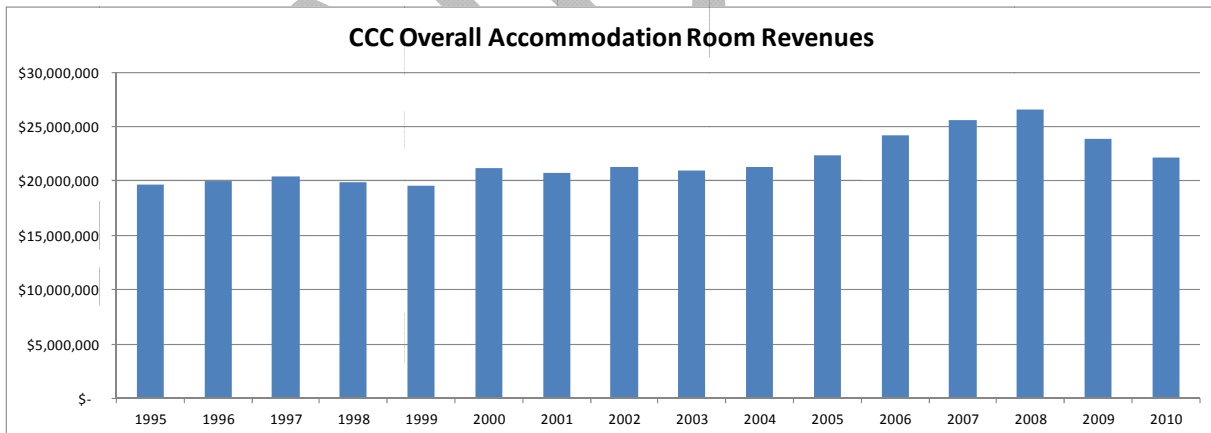
Figure 3: CCC Overall # of Accommodation Properties 1995-2010



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

In addition, there has been a decline in the overall accommodation room revenues since 2008, as reported by the accommodation properties in the CCC (see Figure 4).

Figure 4: CCC Overall Room Revenues 1995-2010

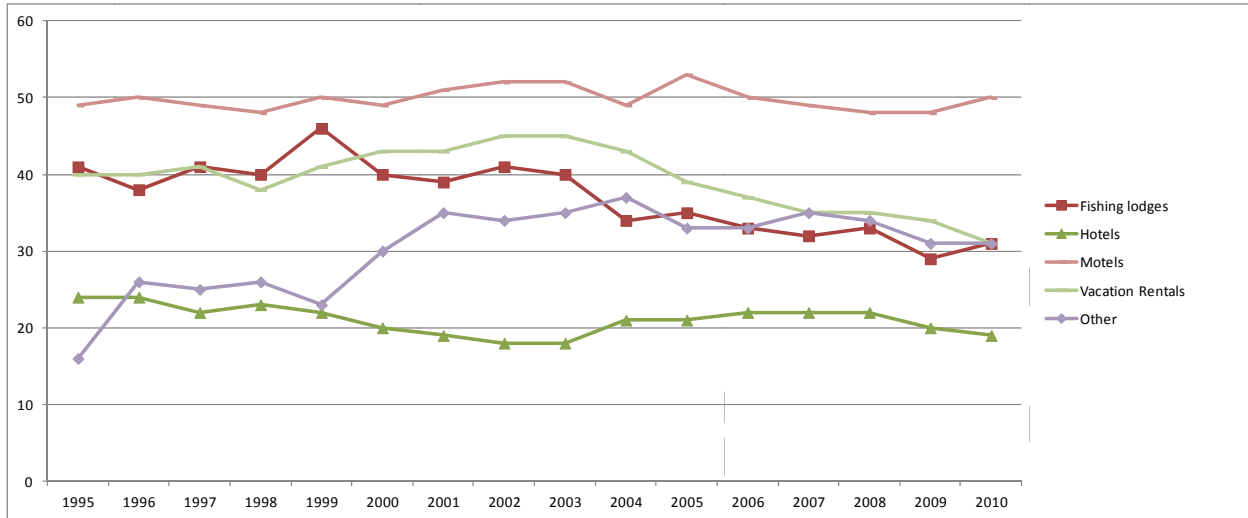


Source: DBC Research Services; BC Stats room revenue data <http://bcstats.gov.bc.ca/StatisticsBySubject/BusinessIndustry/Tourism.aspx>

While the number of hotel and motels has remained relatively consistent over the last decade, there has been a decrease in the number of fishing lodges and vacation rentals (see Figure 5).



Figure 5: CCC # of Accommodations by Type 1995-2010



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

Stakeholder Performance

The following excerpt was taken from the CCCTA 2017 Regional Marketing Plan:

“In general terms Cariboo Chilcotin Coast Tourism Association stakeholders have indicated positive results for FY2016-2017. However, adverse logging activities, the loss of the BC Ferries Route 40 and a slow recovery process from the recent economic down turn, still made for a financially challenging year for some of our operators.”

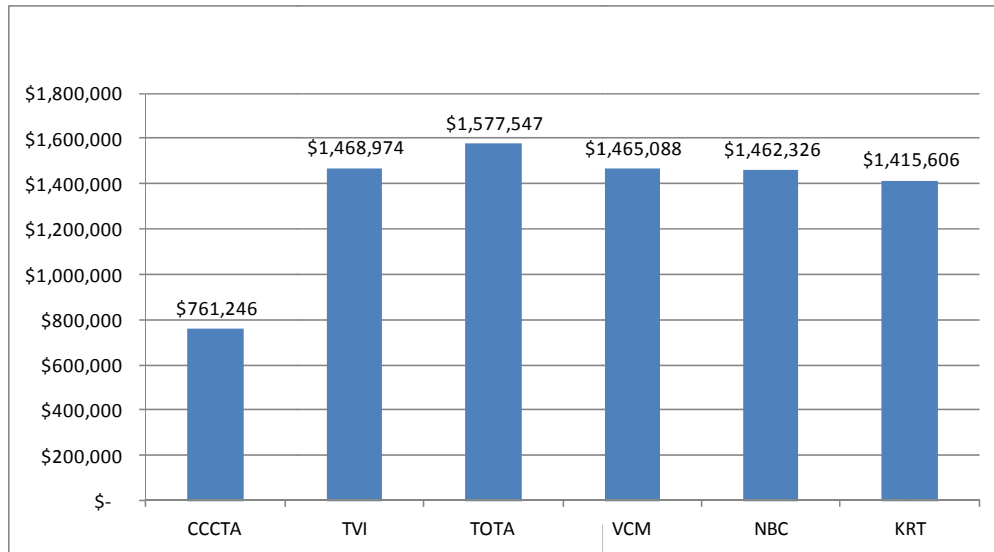
Funding Levels

Destination BC has published the contracts for all six regional DMOs publically. A review of the contract figures shows the CCCTA receives substantially less overall funding than the other five regional DMOs (see Figure 6).

NOTE: As of FY2015-16 Destination BC eliminated contract support to Vancouver, Coast & Mountains Tourism Region. The association subsequently closed and Destination BC now funds activities in this region within their own budgets.



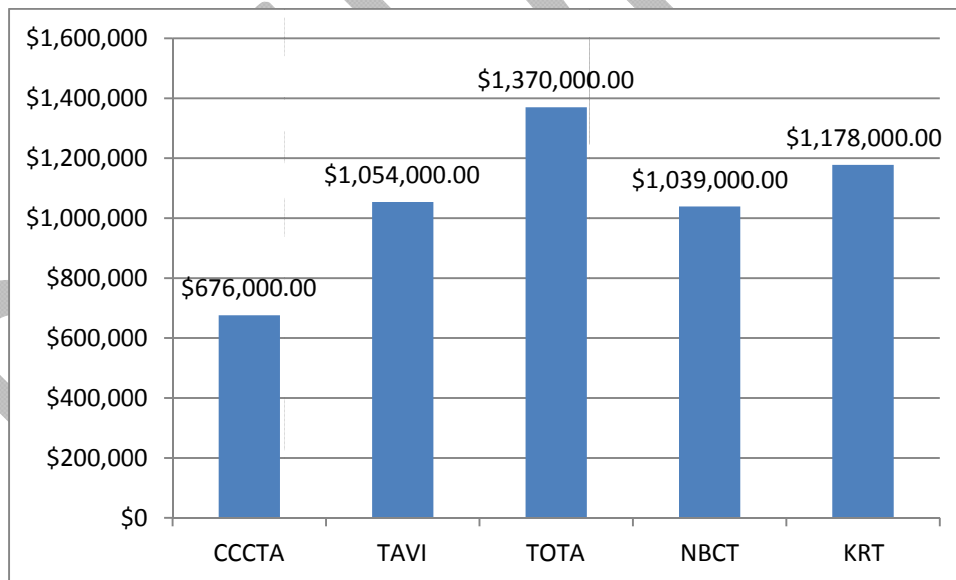
Figure 6: 2013/14 Regional DMO funding by DBC - Total Amounts



Source: Regional Contract FY13-14 as posted on <http://www.destinationbc.ca/About-Us/Corporate-Documents.aspx>

In looking at this over time, funding disparity continues despite reductions in Regional budgets by Destination BC (see Figure 7).

Figure 7: 2013/14 Regional DMO funding by DBC - Program Area



Source: Regional Contract FY16-17 as posted on <http://www.destinationbc.ca/About-Us/Corporate-Documents.aspx>

The following is a direct excerpt from the CCCTA 2013 Business Review Key Learnings section:

- BC domestic market and Europe remain key priorities within the region with continued recovery from the PNW.
- Visitation and profit numbers are widely varied.
- Access continues to create challenges and lost opportunity.



- Events continue to provide a draw in both regular and shoulder seasons, typically from short-haul markets.
- Strong CTO program interest continues to support grass roots tourism and encourage rural areas.*
- Touring remains one of the region's most popular activities.
- Barkerville remains a key attraction for the region, even for many touring travelers. The Barkerville Heritage Trust recently received a multi-year funding and management agreement, extending their funding and operations to 2025.
- The lack of MRDT collection creates challenges in maintained marketing strategies and support of communities for the tourism industry.
- Taxation and lack of business succession support for this industry is creating product losses.
- Lack of stable funding for the regions impedes opportunities for growth and maximization of potential.

* The CTO program was eliminated by Destination BC in 2015.

3.3 Consumer Shifts and Trends

The following consumer shifts have impacted the travel industry:

- Technology use has shifted consumer travel planning, in particular over the last five years. There has been a growth in the use of online, social media and mobile technologies, enabling consumers to access information ubiquitously, share travel experiences and to make better-informed judgments about purchases options.
- Changing demographics with the aging baby boomers and increase in middle class from many overseas markets.
- Consumers are becoming more sophisticated travellers, with a corresponding increase in the expectations of quality service delivery.
- Shorter trip planning cycles.
- Consumers continue to look for value for money, booking shorter trips and less expensive travel options. Conversely, some analysis reports an increase in luxury travel. There appears to be a widening gap with more travel on the high and low ends, with less travel in the middle-range.
- Consumers are looking for authentic, experiential, personalized travel with meaningful experiences.
- Interest has grown for multiple activities and experiences packaged as a complete itinerary.
- BC continually becomes more ethnically diverse, with currently 25% of total population and 42% of Metro Vancouver population within the visible minority population (Canadian Census 2006).

3.4 Product and Service Update

The following is a list of relatively new product and experiences introduced within CCC region:

- Best Western – Williams Lake



- Juniper Trails B&B – Williams Lake
- Bear Camp – Chilko Lake
- Passing Cloud – Great Bear Rainforest
- Freedom Highway Geocache Series – West Chilcotin
- Aerial Escapades – 100 Mile House
- Kayanara Guest Ranch – Canim Lake
- Mountain Thyme Guest House – Wells
- Homathko River Inn B&B – Tatlayoko Lake
- Yellow House Hostel – Bella Coola
- Great Bear Chalet – Stuie
- Kinikinik Restaurant & Store - Redstone
- Little Horsefly Western Town B&B – Horsefly
- Esk'et Tiny House B&B – Alkali Lake

Existing products and services can often find it difficult to invest back into the product, with minimal ability to evolve with changing consumer needs.

3.5 Visitor Analysis

BC Traveller

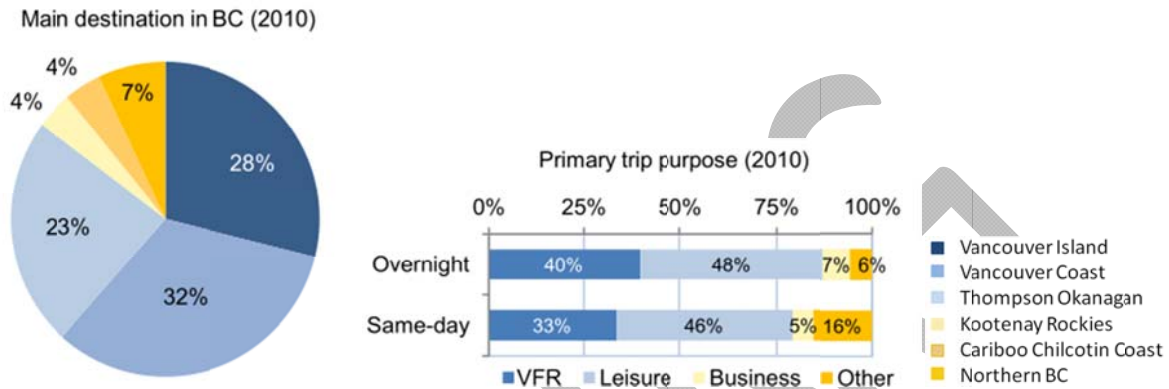
BC is the key travel market for the CCC. The following key insights on this market were taken directly from the BC Market Profile 2012, as provided by Destination BC, to provide a market overview.

- British Columbians took over 8 million overnight trips in BC in 2010, an increase of 9% from 2009 and an increase of 18% over 2006. In 2010, British Columbia residents took 11.1 million same-day trips within BC, an increase of 12% from 2009 and an increase of 31% over 2006.
- In 2010, BC travellers spent 3.1 nights on average during their trip in BC, nearly all of which was spent within the province. There was a slight decrease in trip length compared to 2009.
- Over 90% of British Columbian travellers in BC spent six nights or less during their trip. Three quarters stayed for one to three nights. Within this category, a third stayed one night and 43% stayed two nights.
- Overnight and same-day travellers had fairly similar seasonal travel patterns. There was a spike in overnight travellers during August for summer holidays.
- The primary trip purpose for overnight travellers was VFR (40%), Leisure (48%), Business (7%) and Other (6%) (see Figure 8).
- For British Columbians travelling overnight in BC, there was naturally a range of destinations. A third visited the Vancouver, Coast and Mountains region. Nearly 30% visited Vancouver Island and nearly a quarter visited the Thompson Okanagan. 4% visited the CCC region (see Figure 8).
- Overnight travellers in 2010 took part in outdoor activities, including visiting a beach (22%), hiking (18%), visiting parks (16%), camping (13%), bird watching (11%), boating (10%), fishing (8%) and cycling (6%). 5% visited museums or art galleries, viewed historic sites, or attended concerts or plays.
- BC overnight travel parties spent \$135 per night (\$430 in total) during their trip, while same-day travel parties spent \$110.



- Cars or trucks – either private or rented – were used as primary transportation by over 80% of British Columbians travelling in BC overnight with ship or ferry used 7%, plane 5%, bus 2%, camper or RV (owner or rented) 2% and boat (private or rented) 1%.

Figure 8: BC Market Main Destination and Primary Trip Purpose - 2010



Source: BC Market Profile 2012, Destination BC; original source: Canadian Tourism Commission, Statistics Canada

Regional Market Study

According to a 2006 Regional Market Study by Roger Barnes, only 6% of British Columbians surveyed who stated they would consider BC for a vacation or getaway stated they would consider the Cariboo Chilcotin Coast. This compares to 31% for Vancouver/GVRD/Fraser Valley, 23% for Vancouver Island, 33% for Thompson Okanagan, 14% for Kootenay Rockies, and 12% for Northern BC.

When probed as to how likely they would be to travel to each destination, the likelihood for Cariboo Chilcotin Coast dropped to 4%, compared to 22% for Vancouver/GVRD/Fraser Valley, 18% for Vancouver Island, 34% for Thompson Okanagan, 11% for Kootenay Rockies, and 7% for Northern BC.

In the same survey, when asked of those who had taken a BC trip in the last five years, 26% had stated they visited the Cariboo Chilcotin Coast, which compares to 63% of Vancouver/ GVRD/Fraser Valley, 65% for Vancouver Island, 56% for Thompson Okanagan, 38% for Kootenay Rockies and 21% for Northern BC.

Cariboo Chilcotin Coast Traveller Profile

The following profile provides a general overview of the region and summarizes the latest data available about overnight travellers visiting the CCC. The following are key highlights for the region taken directly from the Cariboo Chilcotin Coast Regional Tourism Profile, January 2015 prepared by Destination BC. The full report can be accessed at http://www.destinationbc.ca/getattachment/Research/Research-by-Region/Cariboo-Chilcoin-Coast/RegionalProfiles_Cariboo-Chilcotin-Coast_2014.pdf.aspx.

Top markets

British Columbia residents make up the largest share of overnight visitation (80%) and spending (67%) in the Cariboo Chilcotin Coast region. Those familiar with the region will not be surprised that German



travellers are included in the top markets for visitation and spending, one of two regions that have this market in their “top five” list (see Figure 9).

Figure 9: CCC Top Five Markets Visitation and Spend - 2010

Top five markets of origin (2012)	Share in Cariboo Chilcotin Coast	
	Visitation	Spending
1 British Columbia	80%	67%
2 Alberta	3%	3%
3 Washington	3%	3%
4 Germany	2%	3%
5 Switzerland	1%	3%

Source: Cariboo Chilcotin Coast Regional Tourism Profile January 2015, Destination BC

The British Columbia and European markets remain key to the Cariboo Chilcotin Coast in 2012, with some growth from Alberta as indicated by other regions. Germany, the UK and Switzerland remain stable with opportunity for growth. Belgium and the Netherlands had strong winter showings for our heli-ski operations.

The mainstay of the Cariboo Chilcotin Coast remains the regional B.C. market with continued room for growth. It is no surprise that key sectors remain touring, fishing, hunting, outdoor adventure, wildlife viewing and guest ranches; however, we are seeing growth in available First Nations product, interest in cuisine, agritourism, mountain biking and niche offerings. With continued attention to unique offerings and access challenges there is ample opportunities for growth from all close-in markets, as well as Europe.

Trip characteristics by origin

The Cariboo Chilcotin Coast received 549,000 overnight person-visits in 2012 and generated over \$118 million in related spending. Domestic overnight travellers accounted for 86% of visitation and 72% of related spending. International travellers accounted for 14% and 28%, respectively.

On average, domestic travel parties in the Cariboo Chilcotin Coast stayed 3.2 nights and spent \$82 per night during their trip. US travel parties stayed 3.1 nights and spent \$222 per night during their trip, and Other international travel parties stayed 5.9 nights and spent \$127 per night during their trip in the Cariboo Chilcotin Coast region (see Figure 10).



Figure 10: Cariboo Chilcotin Coast Visitor - Trip Characteristics by Origin

	Total			% change (2011-2012)			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	549	\$118,508	1,851	6%	-8%	12%	100%	100%	100%
BC residents	440	\$78,928	1,363	15%	-18%	32%	80%	67%	74%
**Other Canadian residents	30	\$6,565	152	-55%	-26%	-52%	6%	6%	8%
**US residents	45	\$17,772	140	23%	66%	-6%	8%	15%	8%
**Other international residents	33	\$15,243	195	14%	27%	28%	6%	13%	11%
Leisure travellers in the Cariboo Chilcotin Coast	303	\$83,163	1,130	6%	14%	25%	100%	100%	100%
BC residents	237	\$58,056	844	8%	5%	25%	78%	70%	75%
**Other Canadian residents	21	\$3,915	98	-21%	100%	74%	7%	5%	9%
**US residents	19	\$12,038	81	0%	59%	-17%	6%	14%	7%
**Other international residents	25	\$9,154	107	26%	7%	44%	8%	11%	9%

*Travellers main purpose of the trip to Cariboo Chilcotin Coast is classified as either Leisure (55%), Visiting Friends and Relatives (40%), Business (2%), and Other (3%).

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

Source: Cariboo Chilcotin Coast Regional Tourism Profile January 2015, Destination BC

Overnight vs Same Day Travel

Same-day travel encompasses travellers who enter and leave a destination (i.e. region) in less than 24 hours. Same-day travellers accounted for 18% of visitor volume and 7% of visitor expenditures in the Cariboo Chilcotin Coast region.

Accommodation

Over one-third of all traveller nights in the Cariboo Chilcotin Coast were spent in the residences of friends and family for all markets of origin, with the exception of other Canadians (see Figure 11).



Figure 11: Cariboo Chilcotin Coast Visitor - Accommodation Type

Primary accommodation*	BC residents	**Other Canadians	US residents	Other international
Friends and family	35%	21%	36%	70%
Hotel	3%	20%	11%	11%
Motel	8%	n/a	5%	4%
Other commercial fixed roof	6%	1%	19%	1%
Camping/RV parks	25%	42%	17%	14%

*Please note the sum will not equal 100% for each market as other non-paid accommodation is not included in the table.
 **Due to small unweighted sample size, please use extreme caution when interpreting.

Source: Cariboo Chilcotin Coast Regional Tourism Profile January 2015, Destination BC

Seasonality

Most people travelled in the Cariboo Chilcotin Coast during the peak summer months, particularly Other Canadians, US residents, and Other international travellers. More British Columbians travelled from January to March compared to other markets of origin, particularly in the month of January (see Figure 12).

Figure 12: Cariboo Chilcotin Coast Visitor - Season of Travel

Season of travel	BC residents	*Other Canadians	US residents	Other international
January to March	28%	2%	3%	1%
April to June	22%	21%	34%	36%
July to September	45%	74%	53%	57%
October to December	5%	3%	9%	5%

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

Source: Cariboo Chilcotin Coast Regional Tourism Profile January 2015, Destination BC

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, and camping. Some cultural activities, including visiting historic sites and museums/art galleries, also ranked as top trip activities among non-British Columbia residents (see Figure 13). It is important to note hunting was not included in this research study.



Figure 13: Cariboo Chilcotin Coast Visitor – Trip Activities

	BC residents	**Other Canadians	***US residents	***Other international
1	Camping	Beach	National, provincial or nature park	National, provincial or nature park
2	Boating/canoeing/kayaking	Boating/canoeing/kayaking	Historic site	Historic site
3	Hiking or backpacking	Golfing	Camping	Camping
4	Wildlife viewing or bird watching	Camping	Fishing	Zoo or aquarium
5	National, provincial or nature park	Museum or art gallery	Museum or art gallery	Boating

*Please note that the activities listed could have taken place anywhere on the trip, not just in the Cariboo Chilcotin Coast.

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

***Please note that the following activities were not included in this analysis: visit friends or family, shopping, sightseeing, bar/night club, sport/outdoor activity unspecified.

Source: Cariboo Chilcotin Coast Regional Tourism Profile January 2015, Destination BC

The Cariboo Chilcotin Coast, when compared to the other five tourism regions, shows the lowest regional share of total overnight visitors, spending and nights (see Figure 14).

Figure 14: Travel Characteristics by BC Region

Regional comparisons

Travel characteristics by region	*Overnight visitors (000s)	Total		% change (2009-2010)			Regional share of total		
		*Spending (\$400s)	Nights (000s)	Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
All travellers in BC	15,729	\$8070,235	74,216	6%	3%	3%			
Cariboo Chilcotin Coast	484	\$105,301	1,835	15%	-1%	8%	3%	1%	3%
Kootenay Rockies	1,581	\$521,582	5,679	-1%	-1%	-2%	9%	7%	8%
Northern BC	919	\$383,027	3,575	5%	-4%	-9%	5%	5%	5%
Thompson Okanagan	3,309	\$1098,024	11,932	2%	-6%	-4%	19%	14%	17%
Vancouver, Coast & Mountains	7,182	\$4086,981	34,703	11%	10%	9%	42%	54%	48%
Vancouver Island	3,736	\$1435,306	14,577	4%	-0.1%	5%	22%	19%	20%
Leisure travellers in BC	8,286	\$4565,658	36,009	4%	2%	3%			
Cariboo Chilcotin Coast	280	\$75,405	1,252	7%	-0.2%	14%	3%	2%	4%
Kootenay Rockies	1,072	\$401,642	3,816	-4%	-0.2%	-2%	12%	9%	11%
Northern BC	442	\$204,415	1,839	12%	-4%	-2%	5%	5%	5%
Thompson Okanagan	1,799	\$727,122	6,545	3%	-3%	-1%	19%	17%	19%
Vancouver, Coast & Mountains	3,669	\$2066,686	13,767	9%	10%	8%	40%	47%	40%
Vancouver Island	1,975	\$876,645	7,462	0.1%	-2%	3%	21%	20%	21%

*Please note the visitation of all regions will not equal the provincial total as travellers can visit multiple regions on one trip and the spending of all regions will not equal the provincial total as the "unspecified" region is not included in the table.

Source: Cariboo Chilcotin Coast Regional Tourism Profile April 2013, Destination BC



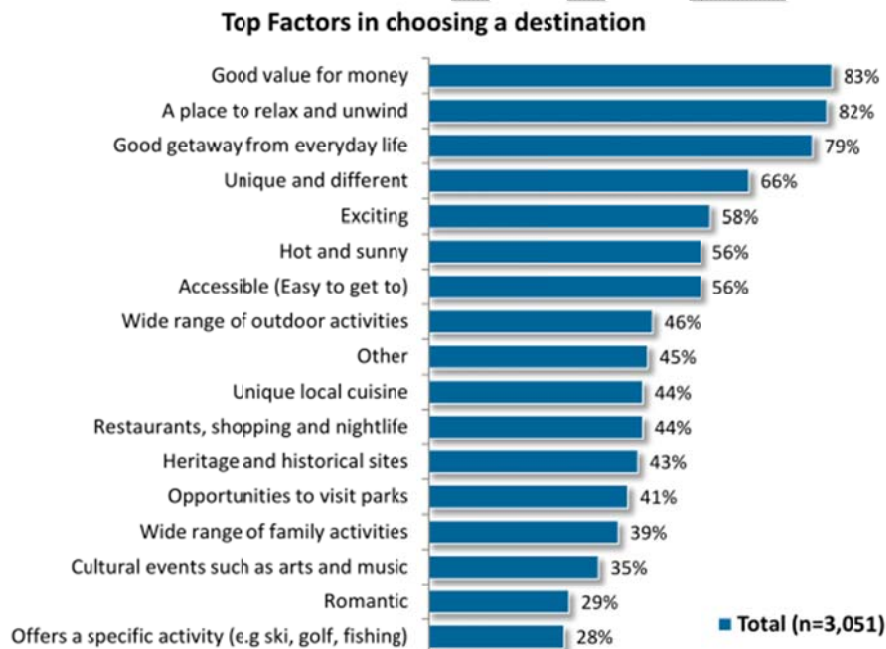
3.6 In-Market Research Report for Cariboo Chilcotin Coast

The following was taken directly from the 2012 In-Market Research Report for the Cariboo Chilcotin Coast study conducted in November 2011 and April 2012. The information is the results of a two-part In-Market study conducted among residents of British Columbia, Alberta, Western Washington State and Eastern Washington State in late 2011 and early 2012. These surveys were conducted by NRG Research to update similar studies conducted in 2008 and 2006. A full report on the findings is available at <http://www.destinationbc.ca/Research/Research-by-Region/Cariboo-Chilcotin-Coast>.

Top Factors for Choosing BC as a Destination

The most important factors, (top 2 box ratings*), for choosing a BC destination are those which offer good value for money, a place to relax and unwind and serves as a good getaway from everyday life. After the top three factors, there is a significant drop in the proportion of ratings to destinations which are unique and different, exciting and hot and sunny (see Figure 15).

Figure 15: Top Factors for Choosing BC as a Destination



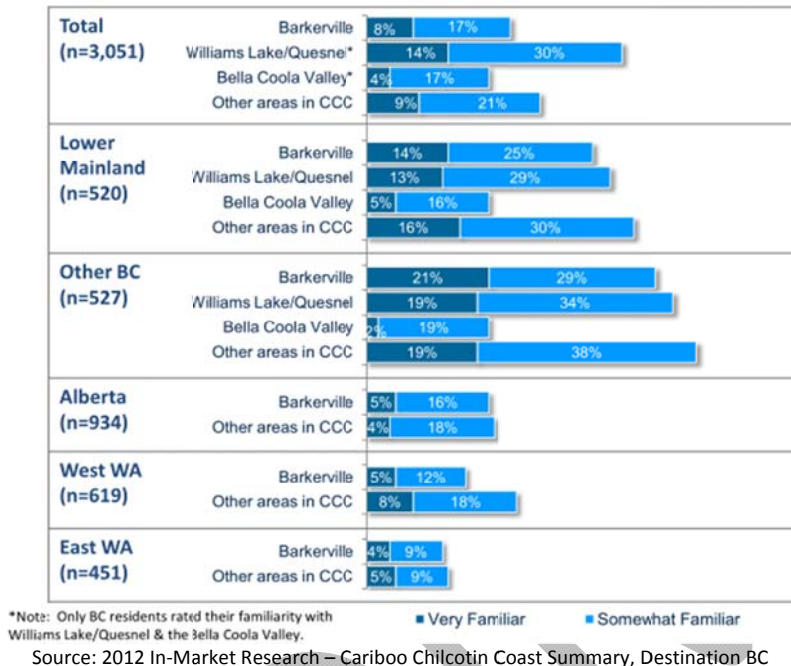
* Top 2 box includes ratings of 4 or 5 out of 5 on a 5 point scale where 1 is 'Not at all important' and 5 is 'Very important'.
Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC

Familiarity with CCC

Among BC residents, Williams Lake/Quesnel and the Bella Coola Valley are the most well-known Cariboo Chilcotin Coast destinations. Relatively few Albertan or Washington State respondents were familiar with the region (see Figure 16).



Figure 16: Market Familiarity with Cariboo Chilcotin Coast

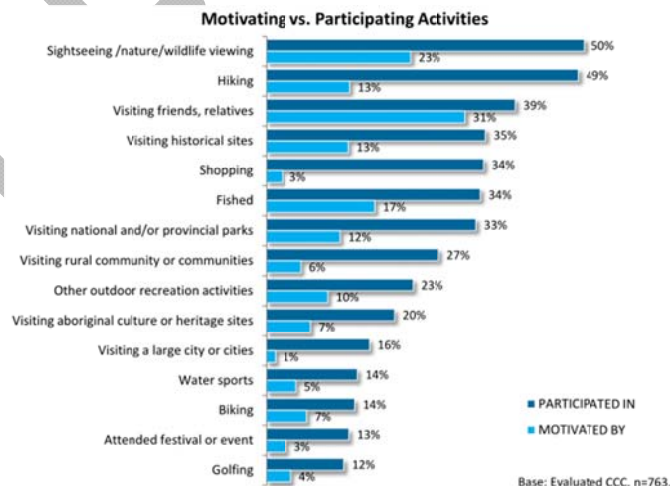


Top Activities Motivated By and Participated In

Visitors to Cariboo Chilcotin Coast destinations were most likely to have participated in sightseeing, nature, wildlife viewing, hiking, visiting friends and relatives and visiting historical sites. Other key activities included shopping, fishing and visiting national/provincial parks.

Visitors to destinations in the Cariboo Chilcotin Coast participated in a far greater range of activities while on their trip than they were originally motivated by. Visiting friends and relatives, sightseeing, nature, wildlife viewing, fishing, hiking and visiting historical sites were the most common trip motivators. Those activities with the largest gap in motivation vs. participation offer the largest opportunities to differentiate from competing destinations (see Figure 17).

Figure 17: Top Activities Motivated by and Participated In – Cariboo Chilcotin Coast



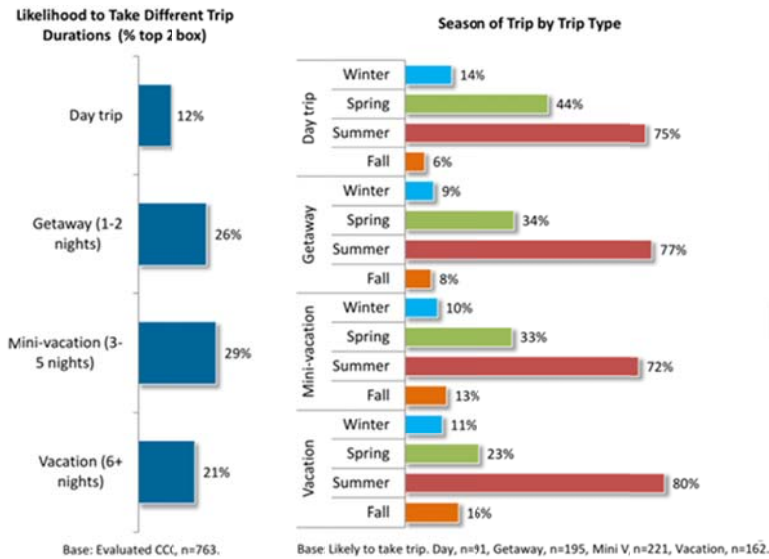
Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC



Future Trips to the CCC

Just under three-in-ten respondents who evaluated CCC are likely to take a 'Mini-vacation' to that region in the next two years, while 26% are likely to take a 'getaway', and 21% a vacation of 6 or more nights. Most future trips to CCC are planned for the summer, however spring is also a relatively popular season to visit for daytrips, getaways and mini-vacations (see Figure 18).

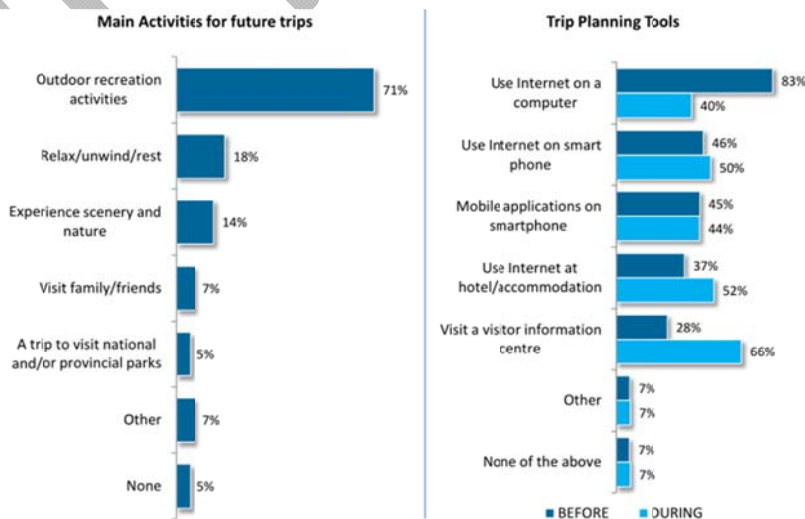
Figure 18: Future Trips to Cariboo Chilcotin Coast – Duration and Seasonality



Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC

Outdoor recreation activities are the primary motivator for trips to CCC, with over seven-in-ten mentioning this as a motivator. This is followed by a trip to relax and unwind and to experience scenery and nature (see Figure 19). The Internet (accessed on a computer) is the key pre-trip information source, while visitor centres, Internet at accommodations and Internet on mobile devices would be used for information during future trips (see Figure 19).

Figure 19: Future Trips to Cariboo Chilcotin Coast – Activities and Planning



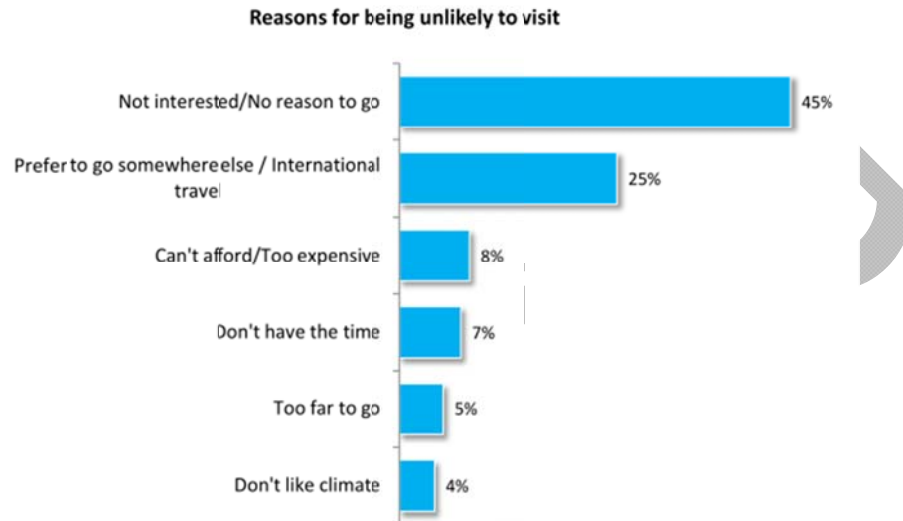
Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC



Unlikely to Visit

Those not likely to visit the Cariboo Chilcotin Coast in the next 2 years cited not being interested/having no reason to go as their main reason, followed by preferring to go to a different/international destination (25%) (see Figure 20).

Figure 20: Reasons for being unlikely to visit CCC



Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC

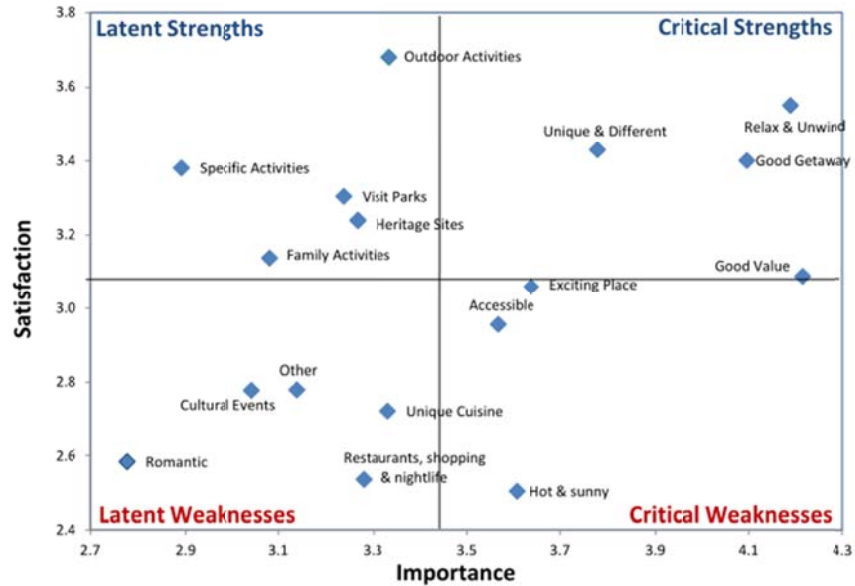
Factors Associated with CCC

The importance/satisfaction matrix divides attributes into four quadrants based on the average importance and satisfaction scores for each attribute. The axis of the matrix shows the overall average importance and satisfaction scores (out of 5) for all attributes.

Being a place to relax and unwind, a good getaway and being unique and different are critical strengths for CCC. Good value is very important but receives an average satisfaction rating. Outdoor activities, specific activities, visit national/provincial parks, heritage sites and family activities are latent strengths for the region (see Figure 21).



Figure 21: Strengths - Importance / Satisfaction Matrix



Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC

Respondents from BC (both Lower Mainland and Other BC residents) associate the Cariboo Chilcotin Coast region with having heritage and historical sites, for offering a specific activity and good value for money.

Residents of Calgary, Edmonton and other Albertan regions also associate CCC with offering a specific activity, having heritage and historical sites and a range of outdoor activities.

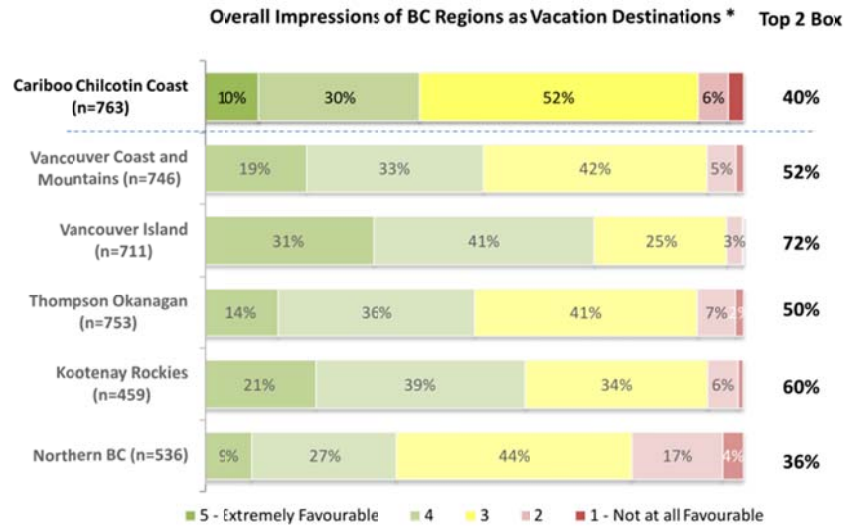
Greater Seattle residents are the most likely to consider CCC an exciting place to be that offers value for money, unique cuisine and is romantic. In contrast, other Western Washington residents are most likely to associate the region with offering a specific activity. The Cariboo Chilcotin Coast is also seen as being a place for historical sites that offers a range of outdoor activities in the eyes of these respondents.

Overall Impressions

Four-in-ten respondents which are familiar with the Cariboo Chilcotin Coast have a very favourable overall impression of the region. CCC is rated more positively than Northern BC, but falls behind in comparison to overall impressions of BC’s other tourism regions (see Figure 22).



Figure 22: Overall Impressions of CCC



* Main urban centres were omitted from the following regional evaluations:
VCM: Vancouver, Richmond & Whistler. **VI:** Victoria. **TOTA:** Kelowna & Kamloops. Base: Evaluated Region.
 Source: 2012 In-Market Research – Cariboo Chilcotin Coast Summary, Destination BC

Other Considerations

The 2012 In-Market Research Report for the CCC provided insights into considerations for the regional marketing efforts. The following was an excerpt from this section of the report.

- ‘Other BC’ and Lower Mainland residents offer the largest potential for tourism. They have both higher levels of familiarity and closer proximity to the region. The relatively lower levels of familiarity (and by extension, favourability) in comparison to other BC regions is a key challenge for the Cariboo Chilcotin Coast.
- Build the CCC brand at a regional level before highlighting key features of the Coast, Cariboo and Chilcotin areas.
- Leverage the association the region has with outdoor recreation activities to encourage future trips, in particular for hiking, fishing and visiting parks. However, this should be tempered with messaging round more passive, comfort-oriented and relaxing activities to ensure that the interests of the wider target market are not overlooked.
- Ensure promotional materials also accommodate the interests of the ‘North-to-Alaska’ driving demographic.
- Highlight shoulder seasons and the wide variety of available activities during these times to grow visitation to the region, especially in fall. This will also help address the key reasons given by those unlikely to visit, namely not being interested or preferring a different destination.
- Consider using promotional material that focuses on the different associations the target populations have with the region. For example, respondents from the Lower Mainland and Other BC are more likely to associate the region with heritage and historical sites, specific activities and value for money than residents from Western Washington and Alberta.
- Maintain exceptional quality of service, availability of information and visibility of visitor centres. Visitors to the Cariboo Chilcotin Coast tend to have a few activities planned but make most decisions about what to participate in while on their trip, placing high importance on accessibility of visitor centres and other information sourced during the visit.



3.7 Marketing Efforts – CCCTA Led

Marketing activities directed towards marketing CCC region as a destination include the CCCTA efforts funded by the Destination BC regional contracts. Total marketing funds in 2017 include approximately \$125,00 in touring and exploring, \$40,000 allocated to travel trade and travel media relations activities and \$40,000 in familiarization support.

Previous activities include:

- CCCTA Regional Travel & Touring Guide
- Cooperative online and print advertising campaigns:
 - Fishing/Guide Outfitting
 - Arts/Culture/Heritage
 - Touring/Camping/RVing
- Cooperative spring/summer advertising campaigns in conjunction with the other five tourism regional DMOs.
- Media Relations
- Travel Trade
- Social Media
- Consumer Shows
 - Touring
 - Adventure
 - Fish/Sportsmen
- Coordination with DBC on evolving the CCCTA section of HelloBC.com
- Printed map pads

Under the new contracts activities include:

- CCCTA Regional Travel & Touring Guide
- CCCTA Map Pads
- Land Without Limits website
- Travel Trade
- Travel Media Relations
- Social Media and content management

Travel Trade

All communities throughout the Cariboo Chilcotin Coast Region, with support from Destination BC, are represented by the CCCTA at the Rendezvous Canada, National Tour Association and Canada's West Marketplace trade events, provincial Discover BC events and the provincial team sales calls to Jonview, Anderson, Brewster and other key receptive tour operators.

Extensive travel trade support also includes proactive and reactive familiarization tours, itinerary planning and transportation/logistical support resulting in regional, national and international travel trade coverage from operators such as:

- Discover Holidays Canada Special at Nyhavn Rejser Denmark,



- Booking.com British Columbia Specialist,
- Canada Alaska Specialist Holidays,
- Adventure Destinations,
- Adventure World,
- Pinpoint Travel Group,
- Destination BC and Destination Canada,
- German Canada Specialist Program staff,
- Sports Leisure Vacations, and
- Jonview.

Travel Media

With support from Destination BC, the CCCTA supports all sub regions and communities within in the Cariboo Chilcotin Coast region comprehensively using both proactive and reactive components of the integrated media relations plan.

The CCCTA meets with key media and target market reps at Canada's Media and GoMedia Marketplace events and at media dinners in Vancouver and Seattle. The CCCTA also mentors stakeholders on travel and social media marketing techniques and supplies Destination BC representatives with media marketing materials for regional representation at meetings in Calgary.

Extensive travel media support also includes familiarization tours, itinerary planning and transportation/logistical support resulting in regional, national and international travel media coverage for the Cariboo Chilcotin Coast Region assisting with projects representing TV, Radio, Print and Online Outlets.

The CCCTA also actively develops relevant content topics and engaging social experiences that are designed to reach their target markets while enhancing travel media efforts, encouraging the desire to travel to the region.

3.8 Marketing Efforts - Destination BC Led

Destination BC has a coop provincial marketing program, website, integrated marketing campaigns, social media, travel trade, travel media, and visitor servicing via the seven British Columbia Visitor Centre locations.

HelloBC Website

The HelloBC.com website managed by DBC is the official CCCTA consumer website: www.hellobc.com/cariboo-chilcotin-coast. In 2012 (Jan - Dec) the CCC regional pages received 79,611 visits (-7% vs 2011), 68,553 unique visitors (-14% vs 2011) and 256,681 pageviews (-7% vs 2011). All indicators are up 40% YTD October 2013 vs 2011. A review of HelloBC website page-views by community shows the page-views for communities within the region (see Figure 23).



Figure 23: HelloBC Web Stats for Cariboo Chilcotin Coast

	# of Pages	Page-views
CCC regional pages		35,900
Bella Coola	15	16,805
Clinton	13	6,777
Lillooet	14	14,127
Quesnel	14	21,636
100 Mile House/South Cariboo	15	32,168
Wells/Barkerville	13	6,434
West Chilcotin	30	6,960
Williams Lake	16	21,407

Source: Destination BC Tourism Activity Summaries, 2013

Reporting from Destination BC has changed with Tourism Activity Summaries no longer being produced; therefore, comparable review is not possible.

The HelloBC webstats for 2015 showed an increase of 9% in total visits over 2014 and a decrease of 5% in page views. For the Cariboo Chilcotin Coast region landing page visits decreased by 10% and regional page views declined by 12%. This trend reinforces the early findings of reducing awareness of the region in comparison to the other BC regions.

3.9 Partnerships

The CCCTA is the lead organization for tourism destination management for the entire CCC region. However, there are multiple organizations that implement tourism development and marketing initiatives throughout the region. These are as follows:

Organization	Role in Tourism in the CCC region
Aboriginal Tourism Association of Canada	Develops and markets aboriginal tourism experiences within the province and country.
Aboriginal Tourism Association of BC	Markets aboriginal 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 Collection.
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	Visitor servicing, promotions, collateral material.
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.
Interlakes Economic Association	Economic development, collateral, promotions.
Likely & District Chamber of Commerce	Visitor information kiosks, website, 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.
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	Tourism planning, website, collateral visitor guide, Quality Assurance - Sustainable Tourism Protocol agreements.
Xwisten First Nation	Product development, collateral, promotion.

In addition to the above organizations, there are other not-for-profit organizations or businesses that also are involved in tourism within the area, primarily as owners and marketers of product experiences, e.g., local events. CCC businesses marketing activities include travel trade, media relations, online marketing, social marketing, print advertising, cooperative marketing, direct marketing and campaigns, brochures, visitor servicing, and outdoor advertising.



3.10 Strengths, Weaknesses and Opportunities

Strengths

- Destination BC and Destination Canada marketing efforts create awareness for the CCC.
- Uniqueness & quality of amenities and assets.
- Being a place to relax and unwind, a good getaway and being unique and different.
- Strong product positioning for fishing/hunting, wildlife viewing, guest ranches and ecotours.
- Strong pioneering culture has created a lifestyle & western/frontier spirit unique to this region.
- Prime area to capitalize on with the provincial touring routes.
- Over 60% of visitors stop at visitor centres, providing an opportunity for education about the region and influencing in-trip planning.
- Representation on DBC's Tourism Marketing Committee.
- Regularly scheduled air service throughout the region from Vancouver provided by Pacific Coastal and Central Mountain Air.
- High interest in region by media.
- Desire by stakeholders to be unique, work cooperatively and create synergies.
- Gold Rush Trail creates awareness and desire to travel to/in region.
- Great Bear Rainforest new designation and marketing partnership is growing awareness and desire to visit.
- Chilcotin Ark presents an opportunity for a new designation and products.

Weaknesses

- Relatively lower levels of familiarity (and by extension, favourability) of the Cariboo Chilcotin Coast in comparison to other BC regions for its key markets.
- Perceptions of CCC as a remote area and not being an exciting place to visit. Remote locations can be a disadvantage with no direct access for tourists by road, air or ferry.
- Many operators feel the tourism product offering in the region is dated and not compelling for travellers to visit.
- Weather sensitive product throughout the year.
- Lack of packaged and market ready product in some sectors, such as agritourism, First Nations & mountain biking.
- Limited size of groups that can be accommodated.
- Currently no convention centre within CCC.
- Lack of service from BC's two largest airlines, Air Canada and Westjet, or with loyalty points.
- Fewer tourism businesses and low stakeholder ability to buy-in limits critical mass of marketing dollars for leveraging.
- Significant lower levels of MRDT marketing power within the region and resulting competitive disadvantage in marketing the region compared to other tourism regions with more MRDT funding.
- Access challenges and high costs of access to region.
- Lack of direct service Port Hardy to Bella Coola from BC Ferries.
- Inconsistent level of marketing activation for some operators, e.g., dated website design and content, low quality images, low online presence or marketing, incorrect google mapping, etc.
- Inconsistent delivery of hospitality, welcoming, customer service and visitor servicing.



- Lack of marketing activities to support the tourism operators who focus on the business/commercial travellers.
- Lack of research, performance measurement statistics and market intelligence.

Opportunities

- Consumer demand for experiential travel continues to grow.
- Increase in consumer interest in First Nations heritage.
- Development of new tourism assets and new product experiences to ensure new experiences to market, e.g., national parks, trails.
- Building on existing and creating new events as a tourism draw.
- Awareness building through a non-paid media attention.
- Ability to leverage Destination BC marketing efforts.
- Destination Canada announcements to support US markets through Connecting America program and hunting and fishing, as well as to support the luxury and Canadian youth markets.
- Continue to build stronger relationships with receptives and tour operators to create new and diverse packaged products.
- Educate stakeholders to capitalize on media & travel trade opportunities.
- Social media strategy and training will enable operator's greater reach with same level of investment.
- Collection of MRDT for increasing available marketing funds.
- Revitalizing and envisioning of the Gold Rush Trail Corridor, Great Bear Rainforest and Chilcotin Ark.
- Develop partnerships and marketing opportunities with Pacific Coastal Airlines.
- New direct ferry service to the Great Bear Rainforest in 2018.
- Potential new passenger rail service to the Cariboo.

Threats

- While CCCTA marketing investment dollars remain consistent, competing destinations are spending significantly more marketing and advertising dollars in key markets.
- Economic downturn threatens reduction of investment from all sources, provincial government, community & stakeholders.
- Domestic air access and high costs.
- Aging independent operators are looking to succession planning that is not supported in the current economic conditions.
- Uncertain land use with changing First Nations structures.

3.11 Key Insights from Situation Analysis

1. The Cariboo Chilcotin Coast has low awareness within key markets and therefore low interest, however the region offers the product experiences that meets the needs of the touring and outdoor adventure markets. Opportunities exist to increase awareness, interest and visitation.
2. New tourism assets and product experiences are needed to draw new visitors to the region.
3. Transportation to and around the region is lacking and creates a barrier to visitation and exploration of new product experiences.



4. There is significant rural product that is off the main highways; current signage may be insufficient in identifying the tourism offerings, both in terms of awareness building and wayfinding.
5. CCCTA has significantly less resources than other regional DMOs to market, and as a result is at a competitive disadvantage.
6. Tourism businesses within the region have limited resources to cooperatively market and leverage available funding programs. Additional resources are available if the tourism businesses were able to maximize their spending levels.
7. There exists a strong history of tourism planning throughout the region with written plans in place for many communities as well as the region as a whole.
8. There is a loss of accommodation product; however remaining products are sharing steady volume.
9. There is a need to support individual tourism businesses to enhance their individual marketing and visitor servicing efforts.
10. There is limited information and data tracking throughout the region to enable the measurement of the effectiveness of the tourism industry within the region on a consistent basis.
11. Growth is projected for the provincial tourism industry. In order for the CCCTA to take advantage and the fair share of this growth, significant additional resources are required for tourism promotion.

4 Strategic Priorities

4.1 Vision

The Cariboo Chilcotin Coast Tourism Association will inspire the Cariboo Chilcotin Coast tourism industry to achieve the vision of a four season iconic destination, known for breathtaking scenery and memorable experiences.

4.2 Goals

The goal of the business plan is primarily to ensure the tourism businesses within the Cariboo Chilcotin Coast tourism region are provided with opportunities equal to those within other tourism regions and communities within BC, which will make the overall CCC tourism product and industry stronger.

The goal is to ensure the CCC region will experience:

- Stronger share of voice for the CCC tourism operators when compared to other BC destinations,
- Stronger ability to cooperate and compete with other BC tourism destinations,
- Stronger ability to respond to marketing opportunities and create new ones, and
- Stronger ability to evolve the product experience to meet current and future consumer needs.



4.3 Objectives

The following objectives have been determined with industry input⁴.

- Increase tourism related spending from \$112.8 million (2014 estimate) to \$166.6 million by 2022 (5% annual growth rate).
 - Calculated from baseline number from 2010; source: Cariboo Chilcotin Coast Regional Tourism Profile April 2013, Destination BC
- Increase person-visits from 516,200 (2014 estimate) to 653,900 by 2022 (3% annual growth rate).
 - Calculated from baseline number from 2010; source: Cariboo Chilcotin Coast Regional Tourism Profile April 2013, Destination BC
- Increase accommodation sector revenues from \$55,900,000 (2014 estimate) to \$82,500,000 by 2022 (5% annual growth rate).
 - Calculated from baseline number from 2012; source: Cariboo Chilcotin Coast Regional Tourism Profile April 2013, Destination BC (sourced within document as Tourism Statistics, BC Stats).
- Increase CCC share of provincial overnight visitation and related spending⁵:
 - From 2.8% of provincial overnight visitation (2014 estimate) to 4.0% by 2022 (5% annual growth rate)
 - From 1.4% of related spending (2014 estimate) to 2.0% by 2022 (5% annual growth rate).
 - Calculated from baseline number from 2010; source: Cariboo Chilcotin Coast Regional Tourism Profile April 2013, Destination BC (sourced within document as BC Stats).
- Increase familiarity of CCC within BC market:
 - Barkerville from 39% in Lower Mainland and 50% in Other BC to 45% in Lower Mainland and 55% in Other BC.
 - Williams Lake/Quesnel from 42% in Lower Mainland and 53% in Other BC to 46% in Lower Mainland and 58% in Other BC.
 - Bella Coola Valley from 21% in Lower Mainland and 21% in Other BC to 26% in Lower Mainland and 26% in Other BC.
 - Other areas in CCC from 46% in Lower Mainland and 57% in Other BC to 51% in Lower Mainland and 63% in Other BC.
 - Baseline 2012 In-Market Research Report, Destination BC and NRG Research Group.

⁴ Proxy measurements were used for all objectives to set baselines for 2014 and may be subject to change based on final figures from Destination BC.

⁵ Caveat - measurement of annual share is based on small sample size. Fluctuations are to be expected. Also, source may not be available at regional level over period of plan execution as currently in review.



4.4 Strategies

The following strategies are determined to be important to significantly provide growth within the region. The strategies fall within four pillars: Destination and Industry Development, Marketing, Visitor Servicing and Tourism Management.

Marketing

1. Invest in approved third-party rights usage media, including video b-roll and still images on behalf of all stakeholders, communities and product experiences in the region.
2. Increase regional branded marketing activities to increase awareness, interest and conversion from existing short-haul and International markets.
3. Support the development and promotion of key travel corridors to the region, for example the Gold Rush Trail.
4. Fully use the Destination BC Open Pool funds to extend the reach and impact of marketing activities within existing markets for communities within the region.
5. Deliver targeted marketing campaigns to drive increased room occupancy and rates.

Remarkable Experiences

6. Support a warm welcome and quality experience for visitors, through increased training of frontline and visitor information centre staff.
7. Advocate to improve the transportation system to provide more convenient, affordable travel to and throughout the region including road, rail, air and ferry access.
8. Develop a signage strategy to improve marketing of off-highway routes.

Tourism Management

9. Increase funding to enable an increase in destination development and marketing activities.
10. Secure dedicated resources to assist with executing and evolving the plan and ensuring stakeholder engagement.
11. Ensure stakeholders are engaged in the evolution and execution of the plan.
12. Implement research and performance monitoring and evaluation to guide business decision making.

Destination and Industry Development

13. Support the development of tourism assets and product experiences throughout the region.
14. More fully support and enhance the development of the tourism industry knowledge and business effectiveness throughout the region.



4.5 Brand

The region will continue to market under the Super, Natural British Columbia brand as the Cariboo Chilcotin Coast region. The activities within this plan will align to and support the brand positioning.

Tagline

Land Without Limits

Brand Positioning

Diverse Adventures & Pioneering Spirit

Visitor Experience Statement

The Cariboo Chilcotin Coast offers three distinct experiences: the Cariboo, with its seemingly limitless lakes, vast ranchland and rich pioneering and First Nations history, welcomes cowboy-wannabes and flyfishers by the score; the Chilcotin, with its wide open plains bordered by rugged mountains, is known for its diverse outdoor experiences; and the Great Bear Rainforest, with its pristine environment and rainforest-filled fjords, is ideal for adventure, wildlife and sea experiences. Combined this region offers limitless one-of-a-kind experiences for the adventurer who enjoys the “path less chosen,” for those looking to re-connect with their pioneering spirit, nature, and themselves.

With the completion of the Destination BC brand review and focus on the Wild Within; the CCC brand continues to evolve to ensure alignment to the evolved provincial tourism brand. It has been noted that three product experiences – hunting, First Nations and the Gold Rush Trail corridor – are currently not specifically called-out in the Visitor Experience Statement.

4.6 Target Market

Geographic Markets

Primary Markets

- British Columbia
- Washington State

Secondary

- German speaking Europe
- Alaska
- Europe sector specific: UK, Switzerland, Belgium, the Netherlands
- Alberta
- Australia

Development

- China
- Japan



- South Korea
- Mexico

Product Sector Markets

Primary Markets

- Touring
- Fishing and Hunting
- Outdoor Adventure
- Wildlife Viewing
- Guest Ranches

Emerging

- First Nations
- Cuisine and Agritourism
- Mountain biking
- Hiking
- Photography

4.7 Priority Actions

The following section outlines the priority actions to support the identified strategies. This document is not meant to be an exhaustive list of all activities, but highlight the strategic priorities for the next five years. The execution of the tactics is dependent on industry engagement and funding.

It is important to note here that this plan and the actions described below will evolve as the industry continues to be engaged in reviewing and inputting into this plan with final determination by the MRDT Marketing Committee.

Marketing

1.	Invest in approved third-party rights usage media, including video b-roll and still images on behalf of and for the use of all stakeholders, communities and product experiences in the region.
Description	While the CCCTA had developed a strong, affordable image bank in partnership with tourism businesses, communities, consumers and photographers, there is a gap in <i>on brand</i> imagery that offers third-party rights usage for the use of media, travel trade and other parties. With the focus on social media and online marketing, visual media is critical to enabling effective marketing. Also, updated imagery is required to ensure strong brand execution that defines the image and positioning of CCC as a visitor destination. Imagery will be aligned with the Destination BC branding priorities.
Actions	<ul style="list-style-type: none"> • Develop a visual media plan over a three-year period, ensuring image list and video list capture requirements for regional iconic experiences marketing, travel corridor marketing, communities marketing, product sector marketing, travel trade and media relations requirements, and seasonality.



	<ul style="list-style-type: none"> • Grow partnership of image and media contributors. • Ensure third-party rights usage requirements are understood by all contributors, enabling the image bank to grow in an affordable and accessible manner. • Extend participation of the current CCCTA Digital Asset Management System (DAMS) for access and input by all stakeholders. • Ensure third-party rights usage is included in all photographer and videographer contracts.
Budget	<ul style="list-style-type: none"> • \$30,000 should be allocated in first year with the intent to leverage the funds with Destination BC. • \$20,000 should be allocated in subsequent years. • Efforts should be made to leverage these funds with tourism businesses and other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.

2.	Increase regional branded marketing activities to increase awareness, interest and conversion from existing short-haul and International markets.
Description	Investment in incremental marketing on behalf of the entire region, promoting all tourism experiences and sectors under the Land Without Limits brand.
Actions	<ul style="list-style-type: none"> • Maximize opportunities for the CCCTA to participate in cooperative campaigns with the other Regional DMOs. • Maximize opportunities for the CCCTA to participate fully and leverage Destination BC and/or Destination Canada International marketing efforts. • Maximize opportunities for the CCCTA to participate fully in the new Destination Canada US-based marketing initiatives. • Enhance and extend regional branded marketing activities to increase awareness, interest and conversion from key product sector markets - touring, fishing, hunting, outdoor adventure, wildlife viewing and guest ranches. • Enhance and extend regional branded marketing activities to increase awareness, interest and conversion to emerging product sector markets - First Nations product, cuisine, agritourism, hiking and mountain biking.
Budget	<ul style="list-style-type: none"> • \$60,000 allocated in first year with the intent to leverage the funds with Destination BC and Destination Canada. • \$70,000 allocated in year two and \$90,000 in year three. • Efforts should be made to leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.



3.	Support the growth and promotion of key travel corridors to and throughout the region, for example the Gold Rush Trail.
Description	Increase the awareness and market appeal of existing key corridor routes.
Actions	<ul style="list-style-type: none"> • Work with the Gold Rush Trail Management Committee to identify key actions for developing and promoting the Gold Rush Trail, including activities within the Tourism North - North to Alaska marketing program. • Work with the Highway 20 stakeholders to identify key actions for developing and promoting the Freedom Highway. • Work with the Fishing Highway 24 Tourist Association and Interlakes Economic Development Association to identify key actions for developing and promoting the Fishing Highway and its connections. • Work with Great Bear Rainforest Stakeholders to identify key actions for developing and promoting our marine highway. • Note: funds will not be utilized for capital/infrastructure expenditures.
Budget	<ul style="list-style-type: none"> • \$60,000 allocated annually to Gold Rush Trail Corridor. • \$30,000 allocated annually to Highway 20 Route. • \$30,000 allocated annually to Fishing Highway 24. • \$30,000 allocated annually to Great Bear Rainforest • Efforts should be made to leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA under advisement of the individual advisory committees for the Gold Rush Trail Corridor, Freedom Highway and Fishing Highway and approved by the Board of Directors and MRDT Marketing Committee.

4.	Fully use the Destination BC Open Pool funds to extend the reach and impact of marketing activities within existing markets for communities within the region.
Description	<p>The Destination BC Open Pool program provides marketing opportunities and leveraged funding for community consortia to market via eligible tourism activities.</p> <p>www.destinationbc.ca/Programs/Regions-Communities-and-Sectors/Destination-BC-Co-op-Marketing-Program.aspx</p> <p>A specific fund will be developed with an allocation for each consortium within the region working with CCCTA and collecting MRDT to draw from to apply towards involvement in approved Destination BC Open Pool activities. To be eligible for funding support, Destination BC Open Pool project proposals must contain new or enhanced elements compared to the community's existing activities and a strategy to evaluate the effectiveness of the investment in these incremental activities must be defined.</p>
Actions	<ul style="list-style-type: none"> • Create financial system for capturing community allocation of MRDT/other funding sources and the credit and debit of funds as projects are executed. • Communities to develop annual Destination BC Open Pool applications and provide to CCCTA. • CCCTA to work with DBC to process and approve applications according to program guidelines. • CCCTA and Communities to execute plans and report on execution per program guidelines.



Budget	<ul style="list-style-type: none"> • \$120,000 allocated annually with the intent to leverage funds with Destination BC. • Efforts should be made to further leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA and/or Communities, depending on activity. Open Pool program is governed by Destination BC.

5.	Deliver targeted marketing campaigns to drive increased room occupancy and rates.
Description	To provide marketing opportunities and leveraged funding for businesses. CCCTA will allocate funds that can be available to augment industry buy-in, creating more affordable and greater reaching marketing efforts. Campaigns will be determined and approved by the MRDT Marketing Committee.
Actions	<ul style="list-style-type: none"> • Develop guidelines as to how funds will be allocated. • Develop process for all Accommodation operators to provide input into annual tactical plans. • Create a tactical plan for supporting marketing efforts of tourism businesses focused on reaching the business/commercial traveller market. • CCCTA to execute plans and report on execution.
Budget	<ul style="list-style-type: none"> • \$250,000 allocated annually with the intent to leverage the funds. • Efforts should be made to further leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.

Remarkable Experiences

6.	Support a warm welcome and quality experience for visitors, through increased training of frontline and visitor information centre staff.
Description	An outstanding positive and seamless experience for the visitor compels the visitor to share their experiences with others and return. Efforts are needed throughout the region to ensure the visitor has a warm welcome, provided good service, has the information they need regarding the activities and services that are available.
Actions	<ul style="list-style-type: none"> • Promote visitor servicing enhancements as part of the Destination BC Visitor Services Innovation funding programs. • Work with Destination BC Visitor Servicing team to identify opportunities to enhance the visitor servicing throughout the region. • Work with industry to identifying opportunities to enhance the visitor experience throughout the region. • Work with Welcome to Williams Lake and relevant groups to advocate for WorldHost and FirstHost training to become curriculum in high schools across the region. • Facilitate in-destination research to determine current levels of visitor satisfaction and identify areas for improvement and implement use of Net Promoter Score.



	<ul style="list-style-type: none"> Facilitate ownership of projects to increase overall visitor servicing satisfaction.
Budget	<ul style="list-style-type: none"> Funding will be applied by the project owner, e.g., Tourism businesses, communities, regional districts and other key stakeholders. Leveraged funding opportunities area available via the Destination BC VIC Innovation funds. Efforts should be made to leverage these funds with other funds from municipalities, regional districts and other available grants. No MRDT funds to be allocated.
Management and Governance	<ul style="list-style-type: none"> CCCTA will provide a role in identifying opportunities to enhance the visitor experience and facilitating ownership of projects. Tourism businesses, communities, regional districts and other key stakeholders will provide a role in identifying opportunities, taking ownership of projects, applying for funding, and executing on project. Governance will be provided via the Destination BC VIC Innovation funds governance models for funding applications.

7.	Advocate to improve the transportation system to provide more convenient, affordable travel to and throughout the region including road, rail, air and ferry access.
Description	The transportation of visitors to and around the region remains one of the most significant barriers to growth. Other than from Vancouver, there is limited affordable and convenient air access. Rental cars are not available in all communities and yet most product is not accessible without road transportation. The BC Ferry service is not constant or available pre- or post- the peak summer months.
Actions	<ul style="list-style-type: none"> Continue to advocate for improved airline and passenger rail transportation systems. Continue to advocate for BC Ferries direct routing and improved ferry schedules and costs. Work with communities to identify options for local rental car service. Review the feasibility of peak-season “Adventure” bus service throughout the region, similar to the Whistler bus, Tofino bus or West Coast Trail bus.
Budget	<ul style="list-style-type: none"> Grant application funding should be reviewed to determine start-up funds to support private enterprise in providing new transportation services throughout the region. MRDT funding will not be used for this strategy.
Management and Governance	<ul style="list-style-type: none"> CCCTA to facilitate the education and awareness of the need and work with partners to advocate for better transportation and support new start-ups.

8.	Develop a signage strategy to improve marketing of off-highway routes.
Description	Much of the tourism accommodations, operators and product experiences are off the main highways throughout the region. In particular, there are key routes that could be developed as new product offerings and then marketed provided adequate wayfinding signage was developed and maintained. Signage is not only required to better identify the tourism offerings throughout the region, but also to increase awareness of product



	availability. Unmaintained and unwanted signs need to be cleaned-up.
Actions	<ul style="list-style-type: none"> • Develop prioritized list of key off-highway and backroad routes that meet marketing requirements for supporting key product experiences or providing new marketable travel experiences, enticing new visitation or longer stays within the region. • Work with Ministry of Transportation to create audit of signage required to ensure adequate wayfinding for visitors. • Explore the feasibility of creating signage specific to the region to increase awareness of off-highway tourism products, e.g., Wilderness Resorts. • Engage stakeholders for input into development and approval of signs. • Create process for reviewing signs annually for maintenance of routes and identifying replacement sign requirements. • Secure or allocate funding for new signs. • Ensure marketing of routes once signs are in place.
Budget	<ul style="list-style-type: none"> • \$25,000 should be allocated in year 1 and 2 to implement signage (5 routes per year at \$5,000 per route). • \$5,000 should be allocated annually for sign maintenance and replacement. • Efforts should be made to leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA. • Monitoring and maintenance of signs to be determined. • Sign execution via Ministry of Transportation, municipalities or regional districts.

Tourism Planning and Management

9.	Increase funding to enable an increase in destination development and marketing activities.
Description	<p>Efforts are required to secure new reliable and consistent funding streams. A balanced approach of funding management is required to ensure sustainable funding for ongoing activities as well as one-time or time-bound funding for specific projects.</p> <p>Please see Funding section on page 47 for a more detailed review.</p>
Actions	<ul style="list-style-type: none"> • Identify potential funding sources (see Funding section on page 47). • Continue to apply to Destination BC Open Pool program for matching funds. • Look for specific funds and grants that are available within the region (see Funding section on page 47). • Look for in-kind support from community stakeholders.
Budget	<ul style="list-style-type: none"> • Utilize existing resources to review sources and secure additional funds. • No MRDT funds to be allocated.
Management and Governance	<ul style="list-style-type: none"> • CCCTA to facilitate the procurement of new funds on behalf of all stakeholders within the region.
10.	Secure dedicated resources to assist with executing and evolving the plan and ensuring stakeholder engagement.



Description	It is critical this plan is successful in engaging and integrating with stakeholders within the region as well as with Destination BC and other marketing partners. A dedicated resource is required to manage the execution of the plan as well as stakeholder engagement.
Actions	<ul style="list-style-type: none"> Hire a contractor or employee dedicated to working on behalf of tourism operators, communities, regional districts to assist the CCCTA in managing and executing this plan. A key role would be the communications with key stakeholders on plan evolution, execution and reporting.
Budget	<ul style="list-style-type: none"> \$100,000 should be allocated to hire and pay true-cost administrative expenses e.g., paper, phone, travel, office space, etc. Efforts should be made to leverage these funds with tourism businesses and other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> Oversight will be provided by CCCTA, under governance of the Board of Directors and the MRDT Marketing Committee.

11.	Ensure stakeholders are engaged in the evolution and execution of the plan.
Description	Ongoing efforts need to be continued to ensure all stakeholders within CCC are represented and supporting this plan.
Actions	<ul style="list-style-type: none"> Establish a communications plan that engages and informs the tourism industry and key stakeholders of this plan and solicits input to its evolution. Encourages participation and support for tourism growth, increased marketing efforts, and the actions as identified within this plan. Engage with key partners and stakeholders to evolve this plan into annual tactical plans for execution. Solicit annual input from accommodators to guide MRDT funds execution and budget.
Budget	<ul style="list-style-type: none"> \$5,000 allocated annually to hold meetings throughout the region to solicit input into the plan. Existing resources and communication vehicles should be utilized to communicate plan activities in subsequent years.
Management and Governance	<ul style="list-style-type: none"> Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.

12.	Implement research and performance monitoring and evaluation to guide business decision making.
Description	<p>Business intelligence is a critical aspect to ensuring tourism development and marketing decisions are being made based on sound research. Efforts should be made to gather and distribute information required to provide the information and research needed to monitor and evolve this plan.</p> <p>Establish a tracking and evaluation program that is directly associated with the goals and objectives of the tourism plan. Instill a culture of ongoing performance</p>



	<p>measurement collection and documentation to enable the analysis of trends over time and ensure business decisions are based on solid information, research and analysis.</p> <p>Tourism development programming should be monitored and evaluated so the CCCTA, community stakeholders and other partners can assess plan progress. This will help with managing and allocating resources, assist with partnership development and build a better relationship with the community by communicating expectations, outcomes and benefits.</p>
Actions	<ul style="list-style-type: none"> • Include in future plans to update current visitor study to provide insight on consumer trends. • Implement robust website statistics tracking to enable better collection of visitor information through this critical channel to market. • Create a culture of researching/following other tourism organizations and target markets to generate ideas for CCC. • Ensure tracking and sharing of performance measurements, statistics and other indicators to monitor performance and enable accurate historical data analysis. • Work with Destination BC Research to leverage research projects that can assist in providing better information, research and knowledge for the CCC to execute and evolve this plan.
Budget	<ul style="list-style-type: none"> • \$15,000 allocated annually to ensure robust information is being gathered to guide business decisions that impact the effectiveness of this and subsequent plans. • Efforts should be made to leverage these funds with other funds from Destination BC, municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> • Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.

Destination and Industry Development

13.	Support the development of tourism assets and product experiences throughout the region.
Description	<p>The CCCTA will support communities, regional districts, tourism businesses and other significant stakeholders to enhance the destination experience and entice visitation, encourage longer stays within the community, increase visitor satisfaction and repeat visitation.</p> <p>This program is intended for viable destination and product development projects that align to and support the marketing and visitor servicing efforts but do not fit within the other strategies.</p>
Actions	<ul style="list-style-type: none"> • Develop a regional trails strategy and execution plan. • Develop a regional roads strategy and liaise with FLNRO. • Develop a regional events plan - building on existing and creating new events. • Develop a fund to assist organizations, municipalities and regions with start-up funds for product and experience development initiatives, including community beautification.



	<ul style="list-style-type: none"> ○ Develop criteria for CCCTA to vet proposals, determine alignment to marketing strategies and grant approvals. All criteria will meet the requirements of the MRDT legislation, including ensuring funds are utilized for tourism marketing, programs and projects and not capital/infrastructure expenditures. ○ Develop criteria for reporting back to CCCTA on the completion of projects for funding for governance purposes.
Budget	<ul style="list-style-type: none"> ● \$25,000 should be allocated annually to organizations, municipalities and regions. ● It is expected these funds would be leveraged with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> ● Execution managed by CCCTA, governed by a Board of Directors and MRDT Marketing Committee.

14.	More fully support the development of the tourism industry knowledge and business effectiveness throughout the region.
Description	Establish an industry development program that supports the needs of local tourism business operators and organizations. As CCC continues to develop its tourism opportunities and outreach to new markets, both individual businesses and the collective industry will require development.
Actions	<ul style="list-style-type: none"> ● Provide free seminars in conjunction with the CCCTA Tourism Summit and AGM and develop an ongoing schedule with Destination BC, Small Business BC and go2HR to host workshops, seminars and free online webinars to improve local understanding of tourism destination management, travel trade, media relations, business development, marketing, service excellence, financial and human resource development. ● Provide one-on-one consulting services to tourism businesses to assist with improving business professionalism and performance. ● Ensure individual tourism businesses and communities align marketing messages to support the regional brand and positioning as well as the newly articulated BC destination brand (Super, Natural British Columbia). ● Host workshops focused on providing an exceptional visitor experience, including <i>WorldHost</i>® Customer Service Training and accommodation quality standards. ● Deliver free Tourism Business Essentials workshops to industry stakeholders (see www.destinationbc.ca/Programs/Guides-and-Workshops/Guides/Tourism-Business-Essentials-Guides.aspx). ● Contact other tourism organizations for sharing of best practices and success stories as they relate to industry education for destination marketing.
Budget	<ul style="list-style-type: none"> ● \$10,000 allocated annually. ● Efforts should be made to leverage these funds with other funds from municipalities, regional districts and other available grants.
Management and Governance	<ul style="list-style-type: none"> ● Facilitation provided by CCCTA, governed by a Board of Directors and MRDT Marketing Committee, working with partner organizations.



4.8 Budget

The following budget has been created to exceed the estimated MRDT funding due to the ability for MRDT funds to be leveraged with other funds from municipalities, regional districts and other available grants. Any funding shortfall will adjust the amounts below based on prioritized input from industry or allocated share of available funds.

Major Category	2018-19	2019-20	2020-21	2021-22	2022-23
Marketing	\$535,000	\$610,000	\$610,000	\$630,000	\$630,000
Visitor Servicing	\$25,000	\$25,000	\$25,000	\$5,000	\$5,000
Tourism Management	\$70,000	\$120,000	\$120,000	\$120,000	\$120,000
Destination & Industry Development	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000
Total	\$665,000	\$790,000	\$790,000	\$790,000	\$790,000

PENDING



Priority Actions Summary		2018-19	2019-20	2020-21
Marketing				
1. Invest in approved third-party rights usage media, including video b-roll and still images on behalf of all stakeholders, communities and product experiences in the region.		\$ 30,000	\$ 30,000	\$ 20,000
2. Increase regional branded marketing activities to increase awareness, interest and conversion from existing short-haul and International markets		\$ 55,000	\$ 60,000	\$ 70,000
3. Support the development and promotion of key travel corridors to the region.		\$ 130,000	\$ 150,000	\$ 150,000
4. Fully use the Destination BC Open Pool funds to extend the reach and Impact of marketing activities within existing markets for communities within the region.		\$ 100,000	\$ 120,000	\$ 120,000
5. Deliver targeted marketing campaigns to drive increased room occupancy and rates.		\$ 220,000	\$ 250,000	\$ 250,000
Visitor Servicing				
6. Support a warm welcome and quality experience for visitors.		\$ -	\$ -	\$ -
7. Advocate to improve the transportation system to provide more convenient, affordable travel to and throughout the region.		\$ -	\$ -	\$ -
8. Develop a signage strategy to improve marketing of off-highway routes.		\$ 25,000	\$ 25,000	\$ 25,000
Tourism Management				
9. Increase funding to enable an increase in destination development and marketing activities.		\$ -	\$ -	\$ -
10. Secure dedicated contracted resources to assist with executing and evolving the plan and ensuring stakeholder engagement.		\$ 50,000	\$ 100,000	\$ 100,000
11. Ensure stakeholders are engaged in the evolution and execution of the plan.		\$ 5,000	\$ 5,000	\$ 5,000
12. Implement research and performance monitoring and evaluation to guide business decision making.		\$ 15,000	\$ 15,000	\$ 15,000
Destination and Industry Development				
13. Support the development of tourism assets and product experiences throughout the region.		\$ 25,000	\$ 25,000	\$ 25,000
14. More fully support and enhance the development of the tourism industry knowledge and business effectiveness throughout the region.		\$ 10,000	\$ 10,000	\$ 10,000
TOTAL		\$ 665,000	\$ 790,000	\$ 790,000

5 Management and Administrative Processes

The Cariboo Chilcotin Coast Tourism Association is a non-profit society and Destination Management Organization that works in conjunction with Destination British Columbia and the tourism industry in the Cariboo, Chilcotin and Central Coast region to strategically support and expand the tourism sector.

Governed by an industry-led board of directors since 1962, the organization follows best practices for destination management operations, works with stakeholders in the region and additional partners at the B.C., Canadian and international level. The purposes of the association are to promote and develop tourism in the Cariboo, Chilcotin and Central Coast tourism region of British Columbia, taking into consideration the impact of economic, social and environmental concerns; and to maintain and improve standards of quality in the areas of tourism promotion and service to stakeholders.



The Cariboo Chilcotin Coast Tourism Association's primary source of funding is the historical contract with Destination BC to deliver tourism programs in the region, in addition the Association has other small contracts, sources grant and special project funding, and does some cooperative marketing that generates revenue from stakeholders and partners.

There are no community destination marketing organizations in this region, and thus, no other current funds collectively allocated to tourism marketing.

The Cariboo Chilcotin Coast Tourism Association is managed by a board hired CEO, who is responsible for the daily operations of the organization. The CEO is responsible for hiring staff and resources to implement the contracted programs and deliver the priorities as directed by the board of directors.

In order to execute this business plan the Cariboo Chilcotin Coast Tourism Association will create a separate business unit, including a separate set of books for transparency of recording and reporting activities separate and distinct from CCCTA contracted activities and a MRDT Marketing Committee, consisting of accommodators from across the region.

Cariboo Chilcotin Coast MRDT Marketing Committee

Purpose: The MRDT committee is responsible for monitoring the development and execution of MRDT plans and programs, separate and distinct from the regular CCCTA marketing strategies.

Election Process: The committee will be nominated and elected by the MRDT/DMF participants. Participants will be considered eligible to vote if they are collecting MRDT or DMF and have contributed to the MRDT program within the last twelve (12) months. Committee terms will be three (3) years in length, on a rotating basis with a third of the board/committee changing annually. Committee members may serve a maximum of two consecutive terms and may return after one (1) term absent.

Quorum: A majority of committee members will constitute a quorum.

Composition: The MRDT committee includes the CCCTA CEO, a CCCTA board appointed liaison and one MRDT stakeholder from each the nine (9) MRDT Areas known as 'A' through 'I'.

6 Funding

The following section identifies and recommends funding sources to execute this plan.

6.1 Funding Objectives

- To obtain start up and implementation funding for the management and execution of this Tourism Plan.
- To obtain longer term commitment and funding to support the full execution of this plan and subsequent plans.
- To obtain ongoing local tourism industry support and financial buy into this plan and marketing initiatives.
- To fully leverage Destination BC Open Pool Cooperative Marketing Programs.
- To implement the first regional MRDT program in the province.



6.2 Funding Models and Sources

The following funding models and sources were identified and were analysed in the process of consulting and reviewing viability of the MRDT application:

- MRDT
- Destination Marketing Fee
- Municipal Governments
- Regional Districts
- Destination BC
- Earned Revenues
- Northern Development Initiative Trust
- Coastal Sustainability Trust
- UBCM Funding
- Cariboo-Chilcotin Beetle Action Coalition
- Western Economic Diversification

6.3 Funding Recommendation

New funding resources are required to enable the new activities as outlined within this plan. A review of multiple funding options led to the determination that the best option is to pursue the collection of the MRDT funding throughout the entire region, an option brought forward by tourism accommodators. The recommended level of funding is 3%.

In addition, efforts should be made to secure and leverage funds from municipalities, regional districts and funding grants, e.g., NDI, CCBAC.

It is believed the CCCTA, as an eligible entity, is the best organization to administer and manage the funds on behalf of the operators, municipalities and regional districts within the region. It is believed up to \$700,000 can be collected via the MRDT (less Ministry of Finance administration fees), which can further be leveraged by the CCCTA through the Destination BC partnership marketing programs.

The funding would be collected from the following entities within the CCCTA boundaries. The CCC region encompasses fully 2 regional districts (Cariboo Regional District and Central Coast Regional District) and parts of the following 5 regional districts:

- 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

In terms of municipalities, the CCC region has 5 municipalities that would need to provide their written support of CCCTA as an Eligible Entity for MRDT collection:

- District of Lillooet
- District of Wells
- City of Williams Lake
- District of 100 Mile House
- Village of Clinton

Industry Show of Support should be collected by May 2017 with the application being provided to the Ministry of Finance in June 2017 for an anticipated implementation date March 2018.



PENDING



7 Appendix

7.1 Appendix A: Areas Collecting MRDT *

VANCOUVER, COAST & MOUNTAINS	VANCOUVER ISLAND	THOMPSON OKANAGAN
City of Abbotsford	Mt. Waddington RD (Areas A, B, C, D); Village Port Alice;	Big White Ski Resort
City of Burnaby	Village of Alert Bay	District of Clearwater
City of Chilliwack (3%)	City of Campbell River (3%)	City of Kamloops (3% July 2017)
City and Township of Langley	City of Courtenay	City of Kelowna (3% July 2017)
City and District of North Vancouver	Cowichan Valley Regional District	Town of Osoyoos
City of Richmond (3%)	City of Langford	City of Penticton
City of Surrey (Note: program ceased March 1, 2017)	Mount Washington Resort Association; Comox Valley Regional District Area C	City of Salmon Arm (effective June 1, 2017)
City of Vancouver	City of Nanaimo	Sun Peaks Mountain Resort Municipality (3%)
District of Squamish	Nanaimo Regional District (Area E, F, G & H)	Regional District of Thompson-Nicola; Barriere and Areas O and P
Resort Municipality of Whistler	District of Oak Bay	Regional District of Thompson-Nicola; Area A
Sunshine Coast Regional District	District of Port Hardy (3% July 2017)	Village of Valemount
Village of Harrison Hot Springs (3%)	Town of Port McNeill	City of Vernon
Powell River Regional District	Town of Qualicum Beach	
	District of Saanich	
	District of Tofino (3% June 2017)	
	District of Ucuelet	
	City of Parksville	
	City of Victoria (3%)	



KOOTENAY ROCKIES	NORTHERN BC	CARIBOO CHILCOTIN COAST
City of Castlegar	City of Prince George (3% July 1 2017)	District of Wells
Regional District of Central Kootenay (Areas D E and F)	City of Prince Rupert	
Regional District of Columbia-Shuswap; Town of Golden; Kicking Horse Mountain Resort Area; Columbia-Shuswap Area A, not including Yoho National Park	Town of Smithers (3% July 1 2017)	
Regional District of East Kootenay; City of Fernie, East Kootenay Regional District Area A; District of Invermere; East Kootenay Regional District Area F; Village of Radium Hot Springs; East Kootenay Regional District Area G		
Village of Kaslo		
City of Kimberley		
City of Nelson		
City of Revelstoke		
City of Rossland (3%)		

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