



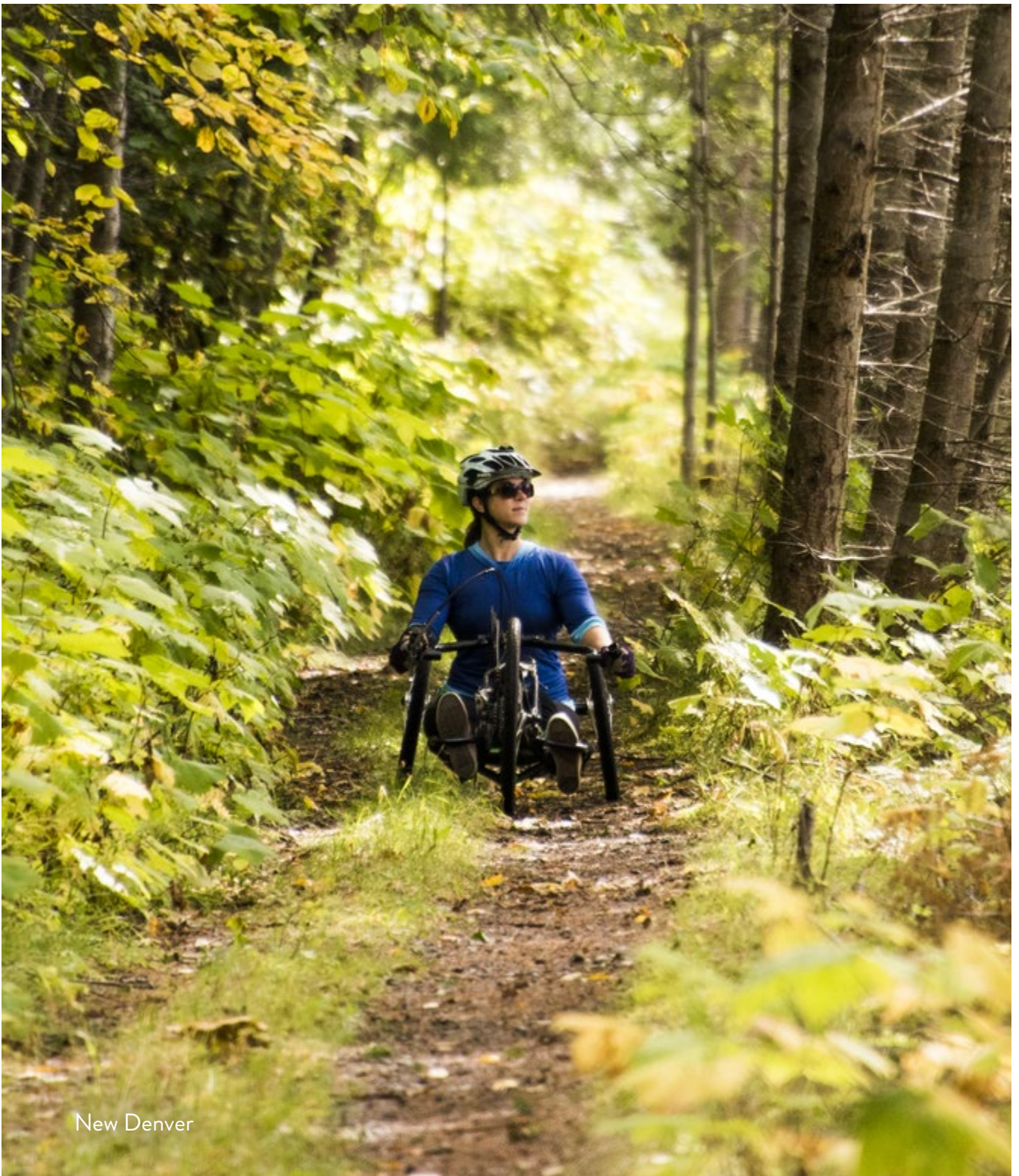
DESTINATION
BRITISH COLUMBIA®

CORPORATE STRATEGY 2020-2023

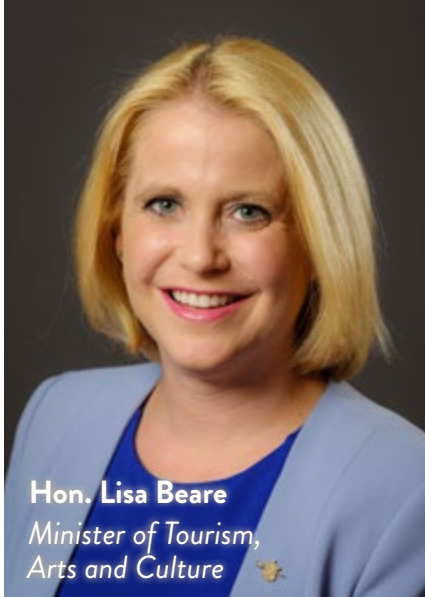


Kamloops

OPENING MESSAGES



New Denver



Hon. Lisa Beare
Minister of Tourism,
Arts and Culture

Message from the Minister of Tourism, Arts and Culture

A flourishing tourism industry is important to every part of our province, and benefits all British Columbians.

Last year, our government developed *Welcoming Visitors—Benefiting Locals—Working Together, A Strategic Framework for Tourism in BC*. It sets out a clear vision for a prosperous industry that is sustainable economically, environmentally, socially and culturally.

Destination BC plays a key role in delivering the strategic framework, providing industry leadership in improving the visitor experience, supporting business and communities, and elevating British Columbia's reputation as a world-class destination.

Destination BC's new corporate strategy supports our government's vision of a prosperous and sustainable tourism sector for all and we will continue to work closely with our partners on realizing this goal.

I am confident that Destination BC, in collaboration with tourism industry partners and all levels of government, will work to inspire travellers from across Canada and around the world to visit all corners of *Super, Natural British Columbia*® for years to come.



Ministry of
Tourism, Arts
and Culture



Dawn Black
Chair



Marsha Walden
President & CEO

Message from the Chair & CEO

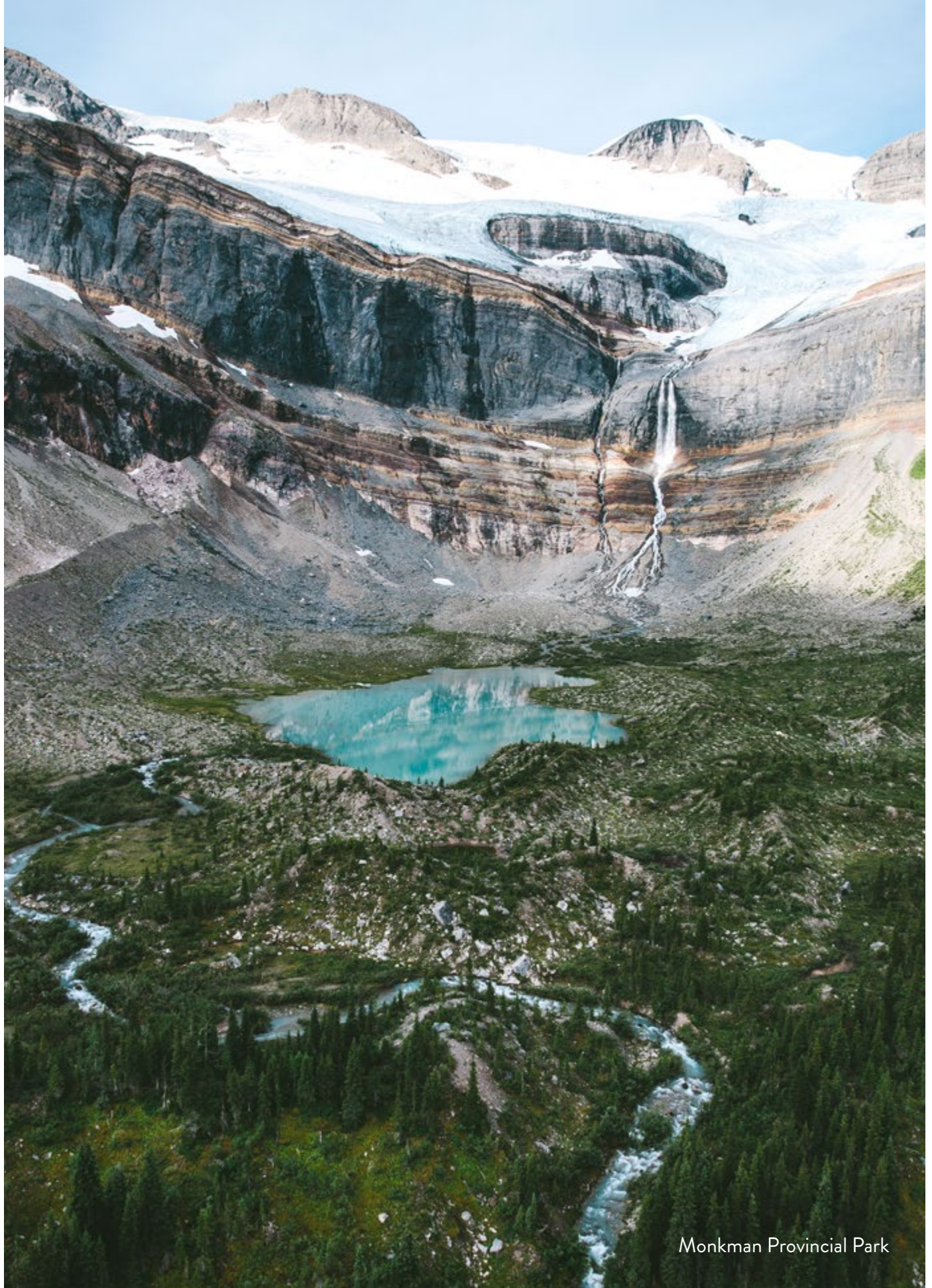
Tourism is one of the largest industries in the world. Here in BC, tourism is a powerhouse and rapidly growing. Despite some significant headwinds in the past year, tourism has a bright future.

We aspire to share the transformative power of BC experiences with the world. Now, in this new decade, we have an ambitious strategy to help our industry be more formidable competitors and achieve our goals while ensuring a sustainable tourism industry that continues to support the quality of life for all British Columbians.

This new strategy, with a focus on working with industry in place making and place branding, is exactly what we need in BC to draw visitors to more places in BC, at more times of the year. We want to show the best of BC to the world.

Working with BC's tourism industry and our strategic partners, we will have the most distinctive and compelling brand proposition in the marketplace, one that can lure the world.

With this new strategy, we can stretch ourselves beyond the 4% growth forecasts in the *Provincial Strategic Framework for Tourism* to reach the target of 6% annual revenue growth. We can increase visitation to more areas in BC, across more seasons. We can be more formidable competitors in the new decade, and beyond! And we can grow sustainable social, cultural, environmental and economic benefits for all British Columbians.



Monkman Provincial Park



ACHIEVEMENTS

Over the three-year horizon of our previous corporate strategy, the BC tourism industry achieved significant success. BC is outpacing Canada in international visitation growth. The visitor economy is outpacing the overall economy in GDP growth. And 161,500 people now work in our industry. We've made progress in improving accessibility of travel, increasing demand for Indigenous tourism, leveraging new technologies that enable us to compete more effectively, managing growth sustainably, and improving collaboration and partnerships, among other successes. Working as a strong industry, we have created a solid foundation of great work that we will continue to build upon.

Hudson Bay
Mountain

Goals Achieved

	Revenue	Net Promoter Score	Stakeholder Survey	Employee Engagement
Goals Set for 2014–2018	Lead Canada in growth of overnight expenditures	Become the most highly recommended destination in North America	Enable a collaborative, digitally-savvy, insight-driven, tourism network	Lead by being a collaborative, insight-driven, results-focused, courageous team
Goals Achieved 2014–2018	Exceeded 5% growth per year. 5-year growth: 41.3% BC vs 21.3% rest of Canada 2014 to 2018	Ranked #1 in 3 of 5 key source markets	Increases in all 6 stakeholder groups	Increased from 3.53 in 2014 to 4.04 in 2018

WATCH WHAT WE'VE ACHIEVED, TOGETHER

Since the launch of our previous corporate strategy, we've hit many milestones and achieved significant gains. Check out this video to see what we've accomplished, together with our tourism partners.

Kootenay National Park

STRATEGY AT A GLANCE

WHAT IS OUR WINNING ASPIRATION?

Share the transformative power of BC experiences with the world.

Grow sustainable social, cultural, environmental, and economic benefits for all British Columbians.

WHERE WILL WE FOCUS?

PATH TO PURCHASE

- Pre-trip
- In-trip

VISITOR DISPERSION

- **Seasonal:** Mature Destinations (Metro Vancouver, Victoria, Whistler, Kelowna, Kamloops, Tofino/Ucluelet)
- **Geographic:** High-Potential Destinations

GEOGRAPHIC MARKETS

- **Invest:** United States, Australia, Alberta, British Columbia
- **Maintain:** Mexico, Germany, United Kingdom, Ontario, China
- **Monitor:** Japan, South Korea, India

KEY PARTNERS

- Tourism businesses, DMOs, Sectors
- Channels (trade, platform, media)
- Destination Canada, provinces
- Governments at all levels



Fort Nelson



HOW WILL WE WIN?

INVEST IN ICONICS

- **Seasonal and Geographic Dispersion**
- **Place Making:** Foster remarkable experiences by improving our destinations, products, services
- **Place Branding:** Amplify through shared brands and marketing

DESTINATION STEWARDSHIP

- Align with CleanBC
- Support UNDRIP, Truth and Reconciliation Calls to Action
- Create accessible experiences and inclusive employment
- Build public support for tourism and preserve our social license
- Support UN Sustainable Development Goals

INTEGRATED INDUSTRY

- Tourism Data Hub
- Integrated Development and Marketing
- Collective people power
- Complementary roles

WHAT CAPABILITIES MUST WE HAVE?

ACTIONABLE INSIGHTS

- Consumer data and analytics
- Industry intelligence

DIGITAL MARKETING EXCELLENCE

- Shareable, scalable marketing
- Industry digital readiness
- Platform partnerships
- Omni-channel personalization

DESTINATION LEADERSHIP

- Destination, product, and experience development and marketing
- Brand storytelling

PARTNER ENGAGEMENT

- Enduring, productive alliances
- Efficient information-sharing

ORGANIZATIONAL AGILITY

- Consumer-centric, empowered decision making
- Adaptable processes, systems, human resourcing
- Growth mindset, test-and-learn culture

WHAT SYSTEMS DO WE NEED?

PEOPLE AND CULTURE

- Performance coaching
- Leadership development
- Cross-functional teams
- Timely recruitment
- Staff-on-demand

DIGITAL WORKPLACE

- Integrated planning and prioritization
- Decentralized access to data and insights
- Real-time business performance dashboards

SHAREABLE, SCALABLE MARKETING PLATFORMS

- Content
- Distribution
- Data and Analytics

PARTNER ENGAGEMENT

- Collaboration technologies, processes
- Alignment programs and forums
- Industry training

CORPORATE STRATEGY 2020-2023

OUR WINNING ASPIRATION

Share the transformative power of BC experiences with the world.

Grow sustainable social, cultural, environmental, and economic benefits for all British Columbians.

Our winning aspiration captures our strategic purpose. It embraces BC's tourism brand, it unifies our focus across all of our marketing and development efforts and, importantly, it motivates us to do our best work, every day.

Goals Set

Industry Goals for 2020–2023

Measures

Revenue

Exceed 4% baseline and achieve target of 6% annual revenue growth in the Provincial Strategic Framework for Tourism

Annual tourism revenue growth rate

Visitors

Become the most highly recommended destination in North America

Net Promoter Score

Residents

Grow sustainable social, cultural, environmental, and economic benefits for all British Columbians

BC resident perceptions of tourism's contribution

Corporate Goals for 2020–2023

Measures

People

(Destination BC Employees)

Lead by being a collaborative, insight-driven, results-focused, courageous team

Employee Engagement

Dispersion

(Seasonal & Geographic)

Increase visitation and tourism revenues in more areas in BC, across more seasons

Room Revenue Growth:

- Seasonal (Mature Destinations)
- Geographic (High-Potential Destinations)

Industry

(Capacity-Building)

Build industry capacity through relevant programs and collaboration

Industry Satisfaction with our programs and services



Mount Robson Provincial Park

REVENUE GROWTH

We have an opportunity to make tourism a greater contributor to the well-being of every part of our province. To do that, we need to improve our competitiveness and capture more share of the global value of tourism. We need two revenue growth strategies:

1. Mature Destinations: Currently, 63% of our tourism industry room revenues are coming from six centres in BC: Metro Vancouver, Victoria, Whistler, Kelowna, Kamloops, and Tofino/Ucluelet. We must continue to grow travel to these mature destinations. Yet, given existing capacity constraints, we must focus on growth during off-peak times and on attracting more high-value international visitors.

2. High-Potential Destinations:

To build a stronger tourism industry beyond mature destinations over the long term, we must work in new ways to lure travellers to visit more areas of the province in all seasons.



Together, we must work both of these dispersion angles—seasonal and geographic—to meet our industry goal of 6%. We must fully integrate our strategies for destination development and marketing.

Where We Will Focus

We can't be all things to all people. We know the best strategy focuses in on those few elements that can make a significant difference.

PATH TO PURCHASE

Destination BC and BC's tourism industry have a collective role in capturing the imagination and interest of high-potential travellers. In the path to purchase, we see our role primarily in the pre-trip and in-trip stages, to build place brands, create emotional interest, and generate referrals to BC's tourism businesses.

We will focus on ensuring that once travellers are in BC, they have remarkable experiences wherever they go; that means we will focus on enhancing our destinations to reflect the uniqueness of their place brands and diversity of what they have to offer our target markets.



Path to Purchase: Pre-trip & In-trip





Kimberley

VISITOR DISPERSION

Visitor dispersion includes both seasonal dispersion and geographic dispersion. For destinations that are already at capacity during high season—our mature destinations—we will focus on shoulder seasons.

We will work with mature community DMOs to increase the effectiveness of marketing and development resources towards shoulder season growth.

To bring greater tourism benefits to high-potential destinations beyond the mature destinations, we will focus on geographic dispersion. This improves the economic diversification and resilience of BC communities. We will invest in new, more effective ways of creating geographic dispersion.



Seasonal Dispersion: Mature Destinations

Geographic Dispersion: High-Potential Destinations



Tofino

GLOBAL MARKETS

To maximize the effectiveness of our marketing dollars, we've made clear choices about the markets with the highest potential for revenue and visitation to British Columbia. Our focus will shift to those markets that can maximize seasonal and geographic dispersion.

Grow



USA



Australia



Alberta



British Columbia

Maintain



Mexico



United Kingdom



Germany



Ontario (Ski)



China

Monitor



Japan



South Korea



India

KEY PARTNERS

The foundation of our strategy requires that we continue to work hand-in-hand with our strategic partners—it's an important part of our collective success. We know we are capable of changing our world when we work together.

- Tourism Businesses, DMOs, sectors
- Channels (digital platforms, travel media, travel trade)
- Destination Canada, cross-Canada provincial partners
- Governments (municipal, provincial, federal, Indigenous)



How We Will Win

Over the last few years, we have completed extensive community engagement and consultation with the tourism industry within BC. This ongoing industry insight helps guide our approach to strategy.

We identified three strategic imperatives that we believe will help us win together in the competitive marketplace:

INVEST IN ICONICS Integrating place making and place branding: building and marketing BC flagships to drive more dispersion. This is a new way of looking at our province—creating iconic, inspirational routes and areas that will strengthen the travel appeal of all parts of our province, in more seasons. It balances the capacity needs and market-readiness of our many destinations—focusing on shoulder-season growth in our cities and mature destinations, while fostering all-season growth in high-potential communities and rural destinations where capacity exists.

DESTINATION STEWARDSHIP Growing tourism sustainably in BC by balancing the social, cultural, environmental, and economic dimensions of our industry to benefit all British Columbians. These values underpin everything we do as an organization and as an industry.

INTEGRATED INDUSTRY Building scale by working more closely together, creating efficiency through complementary roles, and sharing assets across the entire BC tourism ecosystem. We are creating a structural competitive advantage in how we work together and how we manage our destination.



Invest in Iconics

We know we must give travellers compelling reasons to travel to more places in British Columbia in more seasons. Through a strategy of both place making and place branding we are building and marketing flagship routes and areas.

We are at the beginning of a 10-year journey. Together, we will build the Iconics and make them successful. We aim to inspire potential visitors to choose our destinations, and to rally the BC tourism ecosystem to leverage these new shared brands. Through this strategic imperative, we are focused on two key elements:

Place Making

Developing remarkable, compelling experiences through shared destination development and experience development.

- Integrating destination development and marketing strategies to increase visitation to BC's Iconics throughout the province
- Fostering development of remarkable experiences: appealing products, destinations, services, and events

Place Branding

Elevating the appeal of our Iconic places through shared branding and innovative, data-driven marketing.

- Leveraging a shared brand and marketing
- Amplifying marketing investments through Iconics
- Investing in co-operative marketing
- Achieving shared KPI and marketing performance alignment



Victoria



Whistler



Bridge Lake



WHAT IS AN ICONIC?


It's about answering the question: *What do we want to be famous for?*

It's a powerful new way to package and market our province through flagship place brands and place making.

People travel to BC to experience our spectacular settings: monumental mountains, rugged coastlines, abundant wildlife, lush rainforests, and cities surrounded by nature. And they come away with a new sense of well-being, transformed by our province, *Super, Natural British Columbia®*.

Our new strategy creates focal points that can be seen and heard, that can rise above the noise and the vast array of travel choices in the world.

The Iconics approach packages our province in new ways to allow us to strengthen our voice, collectively. To create storylines about our places that ignite the imagination and fuel a desire to experience them. Potential travellers will see our destinations with new eyes. It gives them a simpler path to purchase, to move them from the dreaming stage to the booking stage.



To compete, our destinations and our tourism products need to keep getting better. Other destinations around the world are constantly raising their development game.



CREATION OF OUR ICONICS

We have identified a small number of routes and places that, in total, cover the entire province. With consistent, collective investment in place making and place branding over the next few years, each has the potential to become iconic and compete on a global stage. These are Iconic BC place brand “working concepts”.

This work started several years ago, when we embarked on a major place making planning initiative. The destination development program engaged 1,600 people across the province and resulted in destination development strategies for every corner of our province.

We now have a much clearer sense of how communities see themselves and what the opportunities are. Through this work, the creation of Iconics becomes Destination BC’s provincial destination development plan.

In addition, we researched destinations around the world and the strategies they used to solve their dispersion challenges. We reviewed 10 years’ of research on our key markets, worked with travel trade partners, reviewed current and old travel routes, and conducted preliminary consumer research with people around the world.

Travellers must be our primary filter as we develop BC’s Iconics. If they don’t appeal to the consumer, no amount of marketing and development will entice them to travel.

Destination Stewardship

To build a strong future for all British Columbians, and for generations to come, we want to be excellent stewards of our province—ensuring we thoughtfully develop the economic, social, cultural, and environmental benefits of tourism across British Columbia.

We are doing more to balance all aspects of sustainability, and are working on specific areas that benefit from a provincial leadership role. Through this strategic imperative, we are focused on three key elements:

UNDRIP and Truth and Reconciliation Calls to Action

- Working in partnership with industry, governments, and Indigenous Tourism BC to better support Indigenous communities that want to benefit from tourism
- Working with industry to understand, support, and implement the United Nations Declaration on the Rights of Indigenous Peoples and Reconciliation

Sustainability

- Working with the provincial government and all our industry partners to support the implementation of Clean BC, the provincial strategy to reduce carbon pollution, increase use of clean energy, and reduce waste
- Assessing BC tourism against the United Nations 17 Sustainable Development Goals
- Supporting the development of more accessible and inclusive tourism experiences and employment
- Educating industry, residents, and visitors on sustainable tourism practices
- Managing visitor volume provincially through seasonal and geographic dispersion



Emar Lake Provincial Park

Resident Quality of Life

- Ensuring sustainable tourism growth contributes to the economic well-being and social fabric of BC communities
- Engaging residents in tourism and building public awareness of the benefits that tourism brings to all British Columbians



Tofino

If well managed, the tourism industry provides a great opportunity for strong growth—it can be an even bigger contributor to our economic, social, cultural, and environmental well-being in the future.



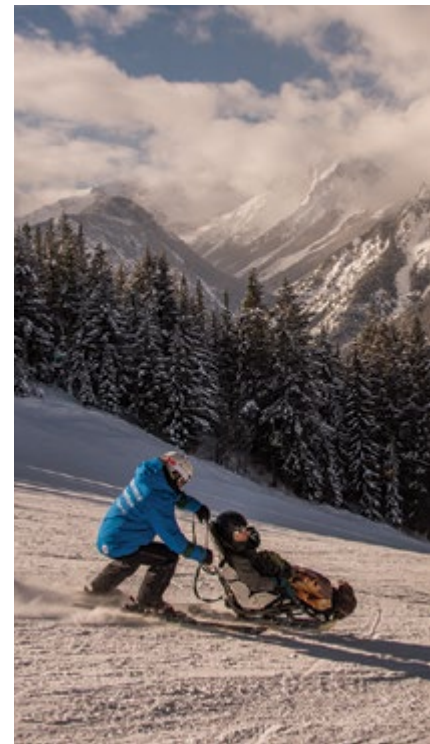
PARTNERS IN INDIGENOUS TOURISM DEVELOPMENT

Our strategy continues to support the growth and development of Indigenous tourism. We have made a new three-year \$4 million partnership funding commitment to Indigenous Tourism BC to grow the benefits of tourism for Indigenous communities. This includes funding for six regional Indigenous specialists. Together, we will increase the number of Indigenous tourism businesses, increase market readiness, and increase the number of visitors who had an Indigenous experience, among other goals.

MAKING TRAVEL MORE INCLUSIVE

Destination BC's Three-Year Accessibility Action Plan ensures residents and visitors of all abilities can experience the transformative power of BC. It makes travel more inclusive in terms of tourism experiences and employment.

Year one focuses primarily on physical and sensory challenges—mobility, vision, and hearing. Years two and three will support cognitive and other inclusion challenges. Our plan also addresses inclusive tourism employment. People with physical, sensory, or cognitive challenges represent an underemployed talent pool. Our industry requires loyal, skilled workers and we have a significant opportunity to tap into this good source of people power in our communities.



RESIDENT SUPPORT FOR TOURISM

We want to ensure our industry continues to have the support of British Columbians. And, right now, we certainly do.

- 94% of BC residents believe that the tourism industry plays an important role in the economic well-being of British Columbia
- Nearly 90% of BC Chamber of Commerce members surveyed say tourism, as a sector, will become even more important over the next decade
- 82% of BC residents agree that tourism supports a greater diversity of amenities in their community than would be feasible without visitors.

Our social license should never be taken for granted. Tourism can enhance the quality of life for all British Columbians through social and cultural amenities such as galleries and restaurants, through environmental stewardship such as wildlife preservation and wilderness trails maintenance, and through economic growth benefitting both cities and rural areas.



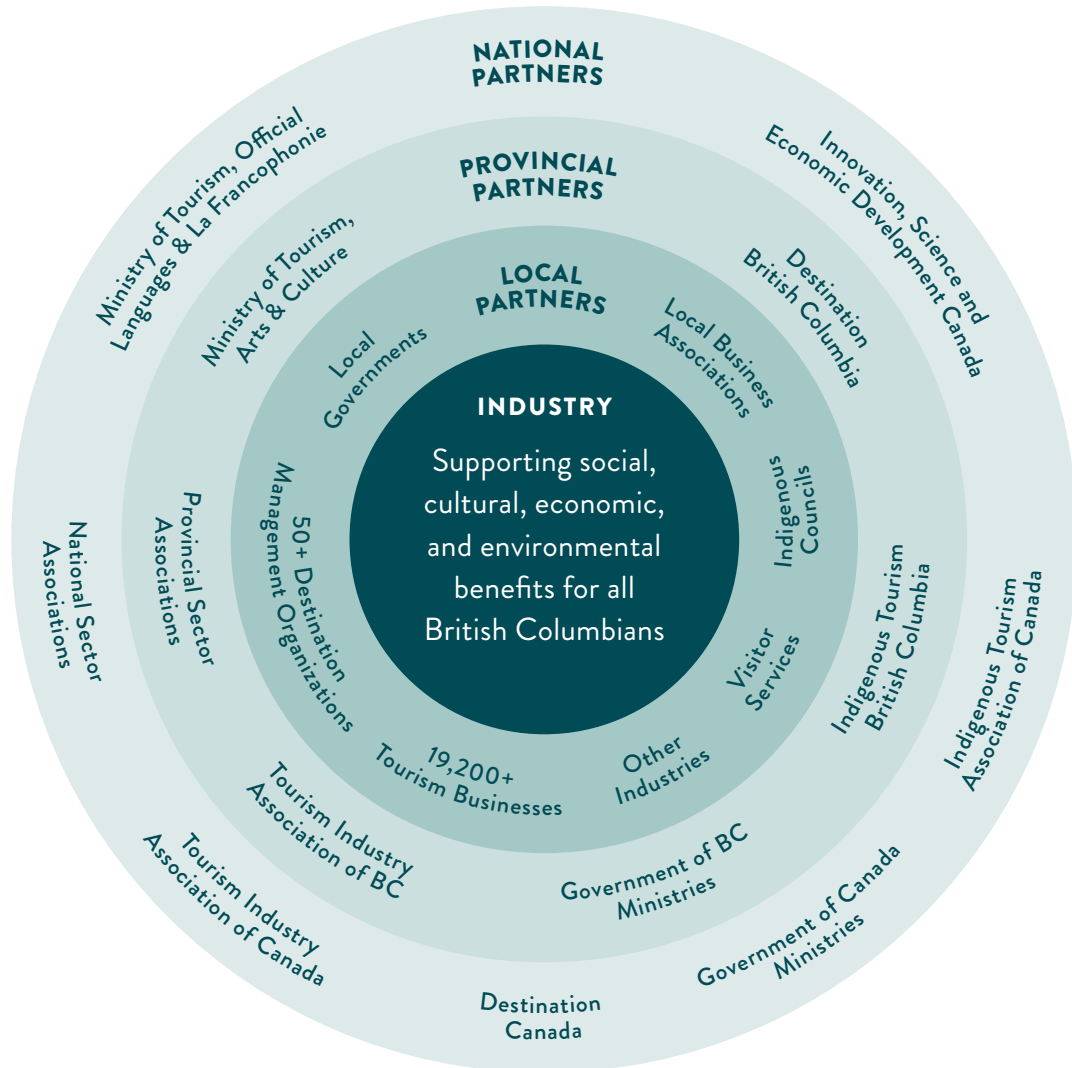
Panorama Mountain Village



Vancouver

Integrated Industry

We can create a competitive advantage through the unique way that we work together. By fully leveraging the ecosystem of partners across our industry, working cohesively to share our intelligence, integrating our go-to-market strategies, and combining our individual resources and expertise, we are more able to meet the demands of our competitive world.



Through this strategic imperative, we are focused on these key elements:

1. Tourism Data Hub

- Continuing to develop new ways for us all to benefit from sharing technology, data, content, expertise, and marketing programs

2. Destination Development and Marketing Integration

- Integrating the work of our marketing and destination development teams and partners
- Supporting the implementation of the shared destination development strategies that were created for every corner of BC through broad consultation with industry, government, and tourism businesses
- Working with Regional DMOs who will lead destination development implementation work on the ground
- Building strategic partner alliances

3. Collective People Power

- Working with industry leaders and partners
- Identifying and recruiting top talent with industry-leading skills and capabilities
- Continuing to invest in and develop our employees
- Engaging in meaningful, trusted partnerships and training

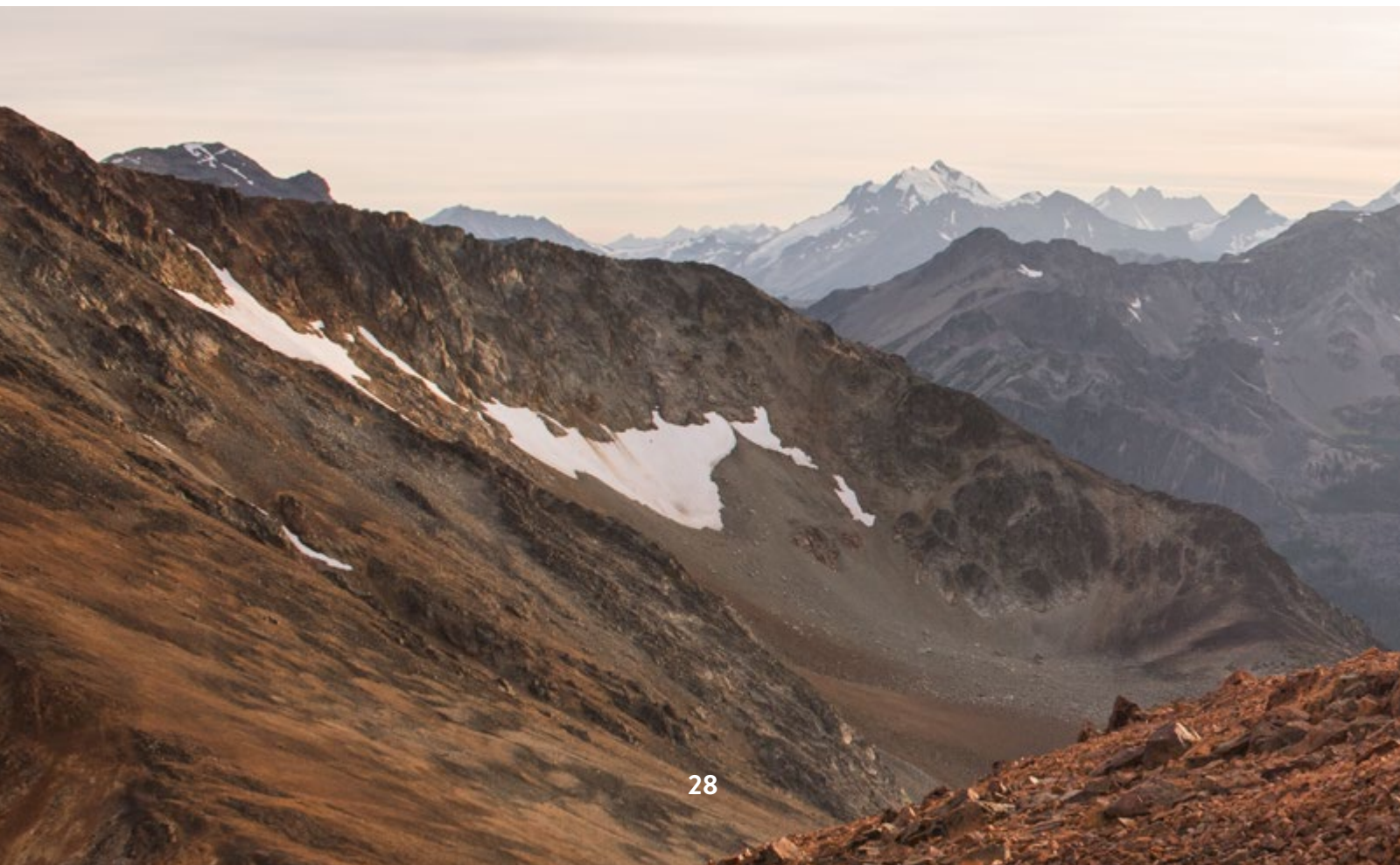
4. Complementary Roles

- Aligning activities across partners to maximize the effectiveness of combined resources
- Seeking complementary, highly-valued, highly-differentiated roles among players in the industry

Capabilities & Management Systems

Capabilities are the activities, skills and expertise that we must have as an organization to deliver on our “where-we-will-focus” and “how-to-win” choices. Given the strategic choices described in the previous two sections, we will continue to develop our capabilities in these areas:

- Actionable Insights
- Digital Marketing Excellence
- Destination Leadership
- Industry Enablement
- Organizational Agility



Management systems are the processes, structures, business rules, and technologies that will build and strengthen the strategic capabilities needed to deliver on our strategic choices and measure and reinforce our performance.

- People & Culture
- Digital Workplace
- Shareable, Scalable Marketing Platforms (Data Hub)
- Partner Engagement





DESTINATION
BRITISH COLUMBIA®

WORK WITH US

We want to work with everyone in our tourism industry. To be truly successful, we need to work collaboratively. Please connect with us to find out more about how we can work together.



Subscribe to our monthly newsletter for updates on tourism news, research, partnerships, marketing campaigns, and more at **DestinationBC.ca/Subscribe**.



Follow us on Twitter **@DestinationBC** and LinkedIn.



Share industry success stories and celebrate the power of tourism by using the hashtag **#BCTourismMatters**.



Support British Columbia's truly remarkable experiences by promoting **#exploreBC** with visitors and residents alike.



Review Destination BC's **Industry resources** and programs at **DestinationBC.ca**.



Explore our online **Industry Learning Centre**. Start at **DestinationBC.ca/learning-centre**.