



DESTINATION
BRITISH COLUMBIA®

CORPORATE STRATEGY INDUSTRY MEETINGS 2022

What We Heard | Public Report: November 2022

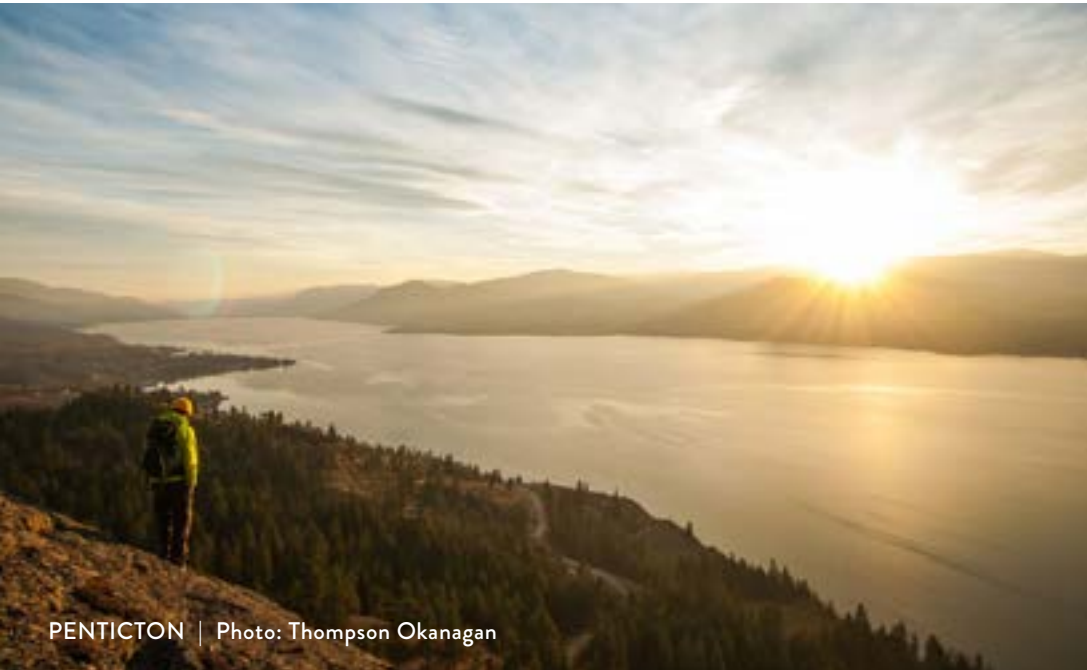


01

BACKGROUND & APPROACH



WHISTLER | Photo: @miraecampbell



BACKGROUND

Destination BC conducted fourteen engagement sessions across the province, each with multiple meetings, for industry to provide input into the development of the corporate strategy 2023–2026.

Purpose of meetings:

Primary

- Share that a future-thinking strategy is being developed.
- Engage the tourism industry in the process.
- Gather input to inform Destination BC's strategic direction.
- Document and share industry perspectives with our Tourism Marketing Committee, Board of Directors, BC's Ministry of Tourism, Arts, Culture and Sport, and our Strategy Development Team and staff.

Secondary

- Renew relationship building between Destination BC staff and BC's tourism industry, in-person, after two years of limited face to face meetings.
- Enable staff to deepen their knowledge of BC's tourism experiences, by visiting communities and businesses, as 'travelers'.

APPROACH

Over the course of each session, Destination BC staff connected with individuals and small groups representing sector organizations, community DMOs, local governments (First Nation, municipal, regional districts), economic development agencies, funding organizations, port authorities, business improvement associations, chambers of commerce, visitor centres, and other community organizations. Staff also familiarized themselves with tourism businesses, suppliers, and communities during their trip.



Fourteen trips, each with multiple meetings, were taken during July, August, and September 2022, covering the following areas of the province:

- South Vancouver Island
- Central Vancouver Island
- North Vancouver Island
- Metro Vancouver
- Fraser Valley, Princeton, Merritt
- Sea to Sky / Sunshine Coast
- Northwest BC
- Northeast BC (two trips)
- West Kootenays
- East Kootenays/Columbia Valley
- South Okanagan
- North Okanagan
- Cariboo North Thompson



Over 180 individuals participated in informal meetings. More than thirty people who could not meet in person participated in online meetings.

Written submissions were provided by those who were unable to attend or had additional sentiments to share.

Feedback has been summarized by themes. Indigenous voices and perspectives have been woven throughout.

Destination BC actively seeks and welcomes input into our strategies and programs. While the supports sought by industry may not necessarily fall within our mandate, the advice we are provided ensures we have a holistic awareness of the ecosystem we are operating in, and supports collaboration with various levels of government, and industry sectors and associations. You can learn more about Destination BC's mandate, here:

<https://www.destinationbc.ca/who-we-are/>

02

THEMES



CHILCOTIN



NOTE: the use of the word “industry” in the following section refers specifically to the individuals and groups mentioned above.

1. Workforce issues are the top barriers for industry and the new reality.

Participants reported a number of factors contributing to staffing shortages, such as the rising cost of living, availability of housing, diminishing pride in working in tourism, diminishing appeal to youth, wages/salaries not keeping up with the cost of living, lifestyle choices (e.g. preference for not working year-round/evenings/weekends), and remote workers moving into smaller communities, who are not joining the local workforce, but driving up the cost of living.



What We Heard

Industry would like Destination BC to consider the realities of labour challenges in the strategy deliverables or creation, and to take a greater role in working with go2HR and government to help change perceptions, find innovative solutions, and resolve short term and long-term workforce challenges.

2. Rethinking what success looks like, taking a Destination Management approach.

Success should no longer be defined or measured by economic value and/or by accommodation sector (“heads in beds”), only. Residents and communities are at the core of destination management best practices. Community well-being, quality of life and resident sentiment are critical, as is community engagement. Communities are looking for the “right amount of tourism” and/or managed growth that is balanced with investment in infrastructure and visitor amenities.



What We Heard

Industry is looking for Destination BC to manage expectations and set realistic growth goals, based on local knowledge, sustainability, environmental resource management, resident sentiment, respectful travel, community growth/changes, visitation levels, availability of infrastructure (ahead of the infrastructure needs of the community/tourism), alongside plans to increase capacity, and attract investment.

3. Indigenous relationship building and reconciliation are priorities.

Participants expressed a need for increased involvement and partnership with Indigenous people, recognizing there is still a great deal of healing that needs to happen, and tourism may not be a priority for some First Nations communities. There is strong support and understanding of why working with First Nations is important (UN Declaration on the Rights of Indigenous Peoples Act, BC's Declaration on the Rights of Indigenous Peoples Act (2019), the Tsilhqot'in Nation v. British Columbia Decision (2014), rights and title, and Indigenous-led self-determination), and many in the tourism industry are asking for assistance on how to move forward. There is a desire for coordination, training, direction, and investment through a more unified approach.



What We Heard

- Industry is seeking Destination BC's help in understanding how to build relationships with First Nations, and develop the knowledge and skills to do so.
- Industry is seeking funding from Destination BC to support Indigenous tourism as a path to reconciliation.

4. Stronger focus on making an impact by promoting the “value of tourism”.

Many participants expressed concerns about a perceived lack of understanding of the value of tourism, that the sector is not fully understood or valued, by various levels of government. There is a perceived disconnect between local municipal governments and community DMOs on the value of tourism to the local economy. Respondents also believed that there is a lack of understanding of, or value placed on tourism as a career, and that residents might not be aware of benefits of tourism for their community. Challenges such as short-term rentals, crowding, and increased costs of travel within BC were noted as impacts on resident sentiment, thereby reducing support and the perceived value of tourism for the community.



What We Heard

- Industry is hoping Destination BC will invest in improving perceptions of the value of tourism with local governments and the BC government.
- Industry would like Destination BC and/or the Province to take the lead on a strong “value of tourism” initiative targeted at BC residents.

5. More detailed data and information to help manage and measure tourism, and promote the benefits of tourism within communities.

There is a desire to capture and share data beyond the current focus on hotels. This would include data on attractions and experiences that are seen as drivers for travel decision making. Also, there is a desire for information at the local level to help present a case for and messaging on the value of tourism, to support destination management, destination development and investment, and to understand visitation levels and resident sentiment. Information is also being requested for niche reports and insights on a variety of topics such as pricing vs competitors, consumer segments, and tracking the marketing efforts of other destinations.



What We Heard

- Industry would like Destination BC to support more holistic tourism measurements, e.g., not just hotel metrics such as ADR or Rev Par.
- Industry would like Destination BC to provide information and indicators at a community, regional and territory level to better support their destination management efforts, understand impacts of tourism, share the value of tourism, build businesses cases, and support investment attraction.
- Industry would like Destination BC to share more information on consumer trends and shifts, competitive reviews, and case studies on specific topics as they arise.

6. Continue focusing on effective marketing but reconsider the market mix.

Overall, there were positive sentiments regarding Destination BC's marketing efforts, with feedback on changing travel behaviors, marketing strategies and tactics (e.g., dispersion, slow travel, staying longer/shorter, exploring further/closer to home, less air travel, conscious travel, complicated travel)

Perspectives were mixed on whether Destination BC should focus internationally or domestically (or both). Many feel that Destination BC should continue to focus on domestic marketing efforts beyond recovery from the pandemic (on par with international efforts). Some feel that Destination BC should refocus on long haul markets, specifically higher spending international travelers, and leave short haul efforts to businesses, communities, and co-op programs.



What We Heard

- Some in industry would like Destination BC to place more emphasis on domestic markets in the future.
- Industry would like Destination BC to continue to focus on geographic and seasonal dispersion.

7. Focus on attracting responsible travelers.

There is a desire for industry to focus on what is being termed as “behavior-aligned” travelers—respectful visitors who appreciate nature, culture and learning, will be responsible while travelling throughout the province (rural, urban, front country and backcountry), will respect the land and acknowledge the territory they are on, adhere to stewardship and safety protocols, follow “know before you go” information, will make repeat visits, and will support local economies.



What We Heard

Industry would like Destination BC to focus on visitor education, and to attract those who will contribute to the holistic wellbeing of communities and their residents.

8. Desire to balance investment in marketing with investment in destination development, including more flexibility in the use of Municipal and Regional District Tax (MRDT) funding.

There is strong desire for more consistent/predictable funding for destination development. There are concerns about funding (amount and access) to ensure availability and maintenance of visitor experiences and amenities both within communities and on public lands that are used by visitors, e.g., rec sites, provincial parks, waste management systems, washrooms, etc. Some expressed a desire for more flexibility to use MRDT funding in ways that most benefit the community, whether that is marketing or other tourism projects, i.e., amenities and infrastructure projects that directly impact the visitor experience.



What We Heard

Industry would like Destination BC to support improvements to current funding programs (MRDT, Resort Municipality, Co-op Marketing Programs) and to create/support new funding programs for destination development and rural economic development.

9. Increased support for rural economic development.

Rural communities feel they do not have the same level of awareness with travelers, or support from the tourism ecosystem as urban areas, and therefore are at a disadvantage compared to larger areas with access to more funds, resources, and opportunities.



What We Heard

Rural areas are looking for support from Destination BC specific to the unique needs of their community, including elevating the appeal and awareness of their destinations in the eyes of travelers, promoting them as an alternative to highly visited locations, and support for rural destination development.



TUMBLER RIDGE | Photo: Jesaja Class

10. Increased sustainability and climate change action needed.

It was felt there is a strong focus, in most parts of the province, on sustainability (environment, social, culture, economic), environmental issues, clean energy, and climate change. Given UN Sustainable Development Goals, nature being a key part of the *Super, Natural British Columbia* brand, and Vancouver having a reputation as “Greenest City”, sustainability is seen as a priority, with a desire for all of industry to be working towards the same goal.



What We Heard

- Industry would like Destination BC and/or the Province to take a strong role/stance on sustainability and climate change, including setting goals, considering the carbon impact of air travel, and lowering the impact of domestic travel.
- Industry would like Destination BC to help tourism operators to adopt sustainable, restorative tourism practices, and support community-based sustainable tourism planning and implementation.
- Industry would like Destination BC to increase awareness of the impact of tourism on climate change.
- Industry would like Destination BC to support increased industry resilience and adaptability, and help businesses address climate change impacts through mitigation and adaptation strategies.

11. Continued industry development, training, and advisory support.

Destination BC's industry development, training and advisory supports have been appreciated and valued, notably within the areas of experience development and digital transformation, and support through emergencies and disasters.

While there is some confusion about who leads industry training, many are looking to Destination BC for help in educating local governments and economic development organizations, who have influence on tourism's success.



What We Heard

- Industry is looking for Destination BC and other organizations providing industry development offerings to consider the best approach and offerings for industry.
- Industry is seeking continued support with business and experience development, destination development and management, digital transformation, marketing tactics, Indigenous reconciliation, industry relations, and what Diversity, Equity, Inclusion and Accessibility efforts.



12. More clarity, coordination, and cooperation across government and within the tourism ecosystem.

There were many comments on the need for continued cooperation and coordination across the tourism ecosystem. Some shared that there is a need to break down silos across the BC government and within the industry, as processes can be hard/frustrating to navigate (especially when it comes to regulations, land use and maintenance, land tenure, getting support on reconciliation, etc.), which can prevent progress on challenges and opportunities. There is some lack of clarity around relative roles and mandates of Destination BC, the Ministry of Tourism, Arts, Culture and Sport, Regional Destination Management Organizations, Indigenous Tourism BC, and others.



What We Heard

- Industry is asking Destination BC to play a stronger role in coordination with government and ministries involved in tourism, and have a larger role within government to enable change.
- Industry would like Destination BC to continue fostering cooperation, collaboration, and information sharing within the tourism ecosystem.
- Industry would like Destination BC to be a conduit to collaboration between Indigenous peoples and non-Indigenous peoples, in partnership with Indigenous Tourism BC.



13. Continued efforts are needed within destination development and experience development.

Feedback in regard to destination development centered around the need for product/experience development (year-round, authentic, Indigenous, guided tours), land management, visitor amenities, support for new business development, more accommodation (quality and diversity), and investments in enhancing existing products and destinations. Many commented on the need for experiences to extend seasonality, such as events and winter products. Transportation improvements are being sought throughout the province, specifically air access and service, ferry service, road and highways, signage, and the general movement of visitors around the province. Destination development improvements should serve both visitors and residents.



What We Heard

- Industry is asking Destination BC to continue investing in destination development and experience development.
- Industry is seeking ‘end to end’ support, not just start-up business development support for new experiences.
- Industry is requesting more government support for parks, recreation, backcountry challenges, visitor amenities, etc.
- Industry is looking for new experience development and infrastructure that will provide a compelling draw for international visitors.



14. Continued efforts on emergency management, coordination, and communications.

Natural disasters cannot be avoided but communications across the ecosystem can be better managed so tourism is not unnecessarily hindered. Many DMOs and tourism businesses are left to fend for themselves and assist with visitors during a crisis, when there is a disconnect with municipal government, emergency response services and the local tourism industry. There is also concern around how media is sharing news stories during a crisis, which can create negative perceptions, confusion, and unnecessary travel cancellations. Industry is seeing shifts in summer travel habits, with visitors choosing parts of the province where there has been less risk of cancellations and disruptions from wildfires, historically.



What We Heard

Industry is seeking Destination BC's ongoing support to help improve emergency management and communications efforts to mitigate the negative impacts to the tourism industry.

15. Destination BC's role in other events and activities



What We Heard

Industry is looking for Destination BC to consider a role in meetings, cruise, events, and air route development.