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CAMPBELL RIVER

FIVE-YEAR STRATEGIC BUSINESS PLAN

Appendix 1.2: 2022-2027 Municipal and
Regional District Tax Renewal Application
Prepared June 2021

CAMPBELL
RIVER 

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Section 1: Five-Year Strategic Overview

Purpose of this strategy

This strategic business plan is how Destination Campbell River will work towards achieving our vision as outlined in the 5-year rolling strategy. It serves as a guide for the upcoming five years, 2022-2026 and the Destination Marketing Organization (DMO) will refer to it when evaluating investments and priorities. In tandem, stakeholders can use it to make informed business decisions.

Each year, an annual plan will be created to move everyone collectively closer to the long-term vision for tourism in Campbell River. Short-term factors, such as the economy or business performance, may influence how conservative or ambitious the aims of a given year's plan will be.

This strategy aligns with Campbell River's DNA and will support continued collaboration across the community to sustainably move tourism forward in a way that benefits everyone in Campbell River. This is why the five-year strategy is shaped by Campbell River's core identity and place brand.

How this strategy was created

Destination Campbell River (DCR) and Destination Think created this strategy using robust research and an inclusive process to ensure support from the local community. Tourism strategies require community-wide participation, and the DMO followed a robust, inclusive process to create this plan.

Timing of the strategy and how COVID-19 affected the process

The basis of this 2022-2026 Strategic Business Plan builds on the five-year rolling tourism strategy process undertaken by DCR in late 2019. The rolling tourism strategy was to be in effect from 2021-2026. This strategic process was completed before the onset of COVID-19, and the results were re-evaluated in preparation for this plan to begin in 2022.

Following strategy workshops in 2019, key themes emerged, and shared interests were identified. Thankfully, the timing of this engagement was unimpeded by what was to come in 2020, so in an effort to reimagine the future of tourism in Campbell River, it remains relevant and appropriate to continue on the path of a rolling strategy, with the same aspirations and intent the industry supported pre-pandemic.

Led by Chief Strategist William Bakker, supported by Marketing Managers and Client Strategists, Destination Think initiated the process by researching the broader context from the global tourism trends to the situation locally and gathering learnings from the past three years. For a tourism strategy to be effective, it must draw from the wisdom and experience of everyone who will use it. As such, the development of this strategy followed a robust process that engaged both direct (e.g. accommodation, F&B, tour operators, cultural facilities) and indirect (e.g. retailers, BIAs, city bylaw) stakeholders.

An online survey was sent to all tourism stakeholders in Campbell River to get input on the local tourism industry's vision, performance, competitiveness, and priorities. The survey was designed to understand the current state of tourism from each stakeholder's perspective and determine common concerns and priorities. There was a strong consensus that the industry needs to remain focused on building Campbell River's reputation, off-season visitation, business-to-business collaboration, and enhancing experiences for visitors. Known and acknowledged challenges were reflected in the data of the survey, including opportunities to beautify and animate the downtown core of Campbell River and provide more enticing shopping and dining experiences.

The information generated from surveys, interviews, and workshops represents a broad spectrum of perspectives, and maintained momentum throughout meeting restrictions by virtual townhalls and individual stakeholder feedback. Importantly, these methods were intentionally selected to provide room for personal stories, collaboration, and healthy debate. Following the workshops, key themes emerged and shared interests were identified. Industry and TAC feedback steps added context and ensured the statutory planning and

reporting requirements under the MRDT program were met. At the same time, council approval provides validation that the tourism strategy aligns with community leadership.

Throughout the strategy process, regular industry and Tourism Advisory Committee feedback was necessary in ensuring strategies were prioritized based on the will of the local tourism industry participants and community partners. 12 sector-specific virtual meetings were held April - June 2020 to understand industry needs and supports, and ensure widespread inclusion and perspectives, and again in February 2021 to review research and strategic priorities. Bi-weekly Tourism Townhalls kept industry connected and informed of changing market conditions and business supports throughout 2020. At the same time, Tourism Advisory Committee reviews and Council approval of annual plans and regular DMO performance reports provide validation that the tourism strategy aligns with community leadership and sustainable development goals.

The team at Destination Campbell River supported by Destination Think, have reviewed and validated much of what still remains to be true to move out of pandemic mitigation phase, to one of recovery and reimagining what tourism in Campbell River and the Strathcona region can look like over this next five-year cycle.

In December 2020, an online survey was sent to all tourism stakeholders in Campbell River to get input on the local tourism industry's vision, performance, competitiveness, and priorities in the wake of COVID-19 impacts and recovery forecasts. The survey was designed to understand the current state of tourism from each stakeholder's perspective and determine common concerns and priorities. In addition to short-term priorities necessary to mitigate further impacts on the visitor economy, there was a strong consensus. The Campbell River tourism industry feels the need to **remain focused on building Campbell River's reputation, shoulder season visitation, business collaboration, and develop transformative experiences for visitors**. Known and acknowledged challenges were reflected in the data of the survey, including opportunities to beautify the downtown core of Campbell River and provide more enticing shopping and dining experiences.

DCR continues to validate the strategy by staying connected with stakeholders and by studying trends.

Destination Campbell River is constantly monitoring global trends and leveraging local data and third party market research to support insights to industry about how these broader global and national learnings affect visitors and operators at a local/regional level, so we continue to engage with industry through Tourism Town Halls, sector-specific meetings, one-on-one interviews, surveys and feedback forms to understand what industry partners are seeing first hand and what different sector themes will emerge. It is these learnings that have informed how we will strategically deploy actions that leverage our opportunities with a holistic destination approach.

The timeline will adjust based on recovery from COVID-19

When the health situation is under control, as indicated by government regulations, public health orders, and industry/social triggers, Destination Campbell River and our partners can restart the visitor economy in Campbell River using this strategy as a roadmap for how to deliver safe, valuable, and desirable experiences to new and recovering markets.

Campbell River's vision doesn't change, but the timeline to realize this vision might. These details will always be reflected in each annual plan. Where there were expectations to prioritize the off-season, efforts may now need to go into protecting the summer season. Where there were intentions to grow and mature experiences and supporting services, it will be necessary to ensure these services exist at all. Campbell River has lived through tough times before, it is part of the tenacious and resourceful attitude evidenced in our people. This is a place that knows how to rebuild and reinvent. When tourism in Campbell River rebounds, tourism leaders in Campbell River are confident in the city, its people, and the tourism industry to move the mission, vision and priorities forward in partnership with a broad network of industry advocates.

Vision and Mission

VISION: We are proud our city delivers life-changing, positive-impact tourism experiences through practical stewardship

Our vision is significant. We recognize that it might take time to realize it. And we know we are succeeding when:

- the number of tourism businesses grow year round
- residents maintain a positive attitude towards the tourism industry
- visitors rate Campbell River experiences high
- the tourism industry's environmental footprint is reduced
- the DMO is recognized as effective and efficient

MISSION: Destination Campbell River will reflect and deliver on the ambitions of Campbell River's tourism industry through:

1. **Collaboration.** We will work together with our industry and the community to prioritize a future where tourism remains a key economic driver, and in which we live in harmony with the natural environment. We will demonstrate this by making sustainable choices in procurement of goods & services, increasing visitor and resident education on responsible tourism practices, and participating in events and activities that contribute to carbon reduction, waste reduction and enhancements to the natural environment.
2. **Research.** We will work with community partners to share and communicate through data-driven evidence what draws visitors to Campbell River, and to enable the industry to focus on attracting the right kind of visitor – one who shares our values and will treat our home with respect.
3. **Industry Alignment.** We will be a supportive partner to all tourism industry stakeholders in the region to increase destination awareness, reputation, brand alignment, and cohesive messaging across all platforms.
4. **Respect and Inclusion.** Ensuring that our work helps Campbell River become a more equitable destination, so all who travel here can enjoy their journey and feel welcome. We commit to being an equal opportunity employer, and consider BIPOC representation in strategic and creative inputs and outputs, and work to highlight inclusive, safe, accessible tourism experiences in Campbell River for all intersections of ages, ethnicities, socio-economic status, sexual orientation, gender expression and diverse abilities.

Strategic Context

The previous 5 year Strategic Business Plan was developed in 2016 to guide the establishment of a new model for destination marketing services, and set up the initial framework to collect the MRDT, which came into effect in March, 2017. The three defined strategies focused on Destination Marketing, Visitor Servicing and Destination Development. Once Destination Campbell River was formally established, staff hired and Tourism Advisory Committee bylaws and mandate identified, annual plans were implemented to define the scope of work within the requirements of the strategic plan.

Upon the start of our work in Campbell River we quickly learned that the foundation for success wasn't there. The Visitor Centre wasn't operating, industry wasn't united and was disappointed by the state of destination marketing. From a reputation perspective, Campbell River was missing the awareness amongst potential visitors and under-represented by the provincial tourism ecosystem.

That didn't mean there wasn't potential. Campbell River has assets most places can only dream of. It's situated

in one of the most beautiful places in the world, offers numerous tourism world-class experiences, in an authentic way by locally owned operators who care about their product, experience and place.

Meeting the requirements of the strategy meant undertaking significant foundational work necessary to set up the City of Campbell River for long-term success, prioritizing industry consultation, visitor needs, and adopting a more modern approach to destination marketing.

The foundation is now rock solid. With a modern brand, experienced staff, professionally executed activities and strong relationships with our local industry and the recognition by the tourism ecosystem that Campbell River is a place to put on the map, we can look forward to reaping the rewards.

Highlights of the work done to date to achieve the goals set out in the inaugural plan include:

Destination Marketing:

- **PROMOTIONAL CAMPAIGNS:** Ran promotional campaigns to build reputation amongst target audiences and promote off-season experiences and visitation.
- **BRAND EVOLUTION:** Launched a new brand identity, messaging toolkit and developed a robust content and asset bank aligned with the Destination BC brand and reflective of Campbell River's unique selling proposition. The new brand is modern, professional, and rooted in Campbell River's Place DNA®. New brand standards guidelines help to support industry partners.
- **CONTENT CREATION & ASSET MGMT:** Elevated social media content planning and delivery, added channels, and maintain 365-day social listening, personal engagement; Implemented CrowdRiff Asset management platform; acquired and produced licensed Video and Photography Assets - UGC, stock image purchases and directed shoots
- **WEBSITE REFRESH:** Updated the website with new content and functionality to meet the needs in the customer journey.
- **COOP MARKETING:** Offered industry opportunities into our promotional activities in almost all of our main campaigns.

Destination Development:

- **INDUSTRY ENGAGEMENT:** Initial transition to the new DMO started out volatile, there was some uncertainty and mistrust from industry stakeholders. As of spring 2021, the DMO has an approval rating of 85%+ according to the most recent stakeholder survey. All destination marketing decisions are informed through numerous industry engagement sessions that are mostly well attended.
- **INDUSTRY ALIGNMENT:** Through our Xcellerator program, we started the process to align experience and promotions across the city with our Place DNA® and brand, while increasing the digital marketing sophistication amongst 20 participating stakeholders.
- **CRISIS COMMUNICATIONS:** Provided provincial and national updates related to the pandemic. Shared learning and best practices from around the world through well-attended town halls and workshops.

Visitor Services:

- **VISITOR CENTRE:** Modernized operations by turning the existing visitor centre into a welcome centre that now represents the Campbell River brand.
- **TOASTY:** Our beloved Campbell River branded truck that serves as both a mobile destination animation tool, as well as a way to bring visitor services to where our visitors are.

In keeping with the goals and intent laid out in this initial 5 year strategy, it became apparent through market research, declining visitor interactions at the information centre, and increased digital sophistication of visitors that technology and consumer behaviours were changing more quickly than the original strategy outlined. This resulted in the need to take the new learnings to date and revisit the strategic plan.

Using the existing plan and KPIs as a basis for evaluating the performance of the DMO against the strategy remained important, but a need to develop an industry-led, focused strategy with defined themes that all

community partners could align with was critical. This resulted in the development of the Campbell River Rolling Tourism Strategy 2021-2026, which was completed before COVID-19 impacted the world and remains a valuable guiding document informed by industry. It was re-assessed for relevance, forming the basis of this new plan. It will remain important to revisit the 5 year plan in preparation of each annual tactical planning process, and the rolling strategy at a mid-way point in this MRDT collection cycle.

THE IMPACT OF COVID-19

The opportunity of creating a new Five-Year strategic business plan means there is also an opportunity to reimagine, address challenges, and leverage opportunities from a fresh perspective. The longer-term impacts of the pandemic won't be known for some time, with many industry experts forecasting a recovery timeline to 2019 levels between 2023-2025. What is clear is that there has been significant damage to the tourism industry; some businesses might not survive the challenges of the pandemic. Tourism in Campbell River, and virtually every other place in BC and the rest of the world, will look different. Visitors might be different as well. A continued lack of air access could negatively affect the number of long-haul visitors, and prolonged border closures and restrictions may have lasting negative impacts on the reputation of our nation and province.

When the crisis is over and the tourism industry in Campbell River has a full understanding of COVID-19's impact on the city and industry, it will be crucial to reassess this strategy again, through regular evaluation of the strategy and how it will continue to apply to annual tactical plans, and regional cooperative partnership marketing programs.

OUR STRATEGIC APPROACH TO MANAGING THE PANDEMIC

Destination Think's approach to planning a post-COVID-19 future relies heavily on the deep and thorough research undertaken throughout the crises, that is predicted to unfold in three phases:

Mitigate

During the writing of this document, the industry remains in this phase. With travel restrictions extended through May 25, 2021, Destination Campbell River and its partners are doing everything they can to minimize the impact of the crisis in the hopes a domestic summer season may still be salvaged in 2021. Examples include sector-specific meetings, virtual tourism townhalls, bi-weekly bulletins, regular communications with Economic Development, Chamber of Commerce, Business Improvement Associations and media, as well as the amplification of partner content through social channels and travel trade supports.

Restart

When the health situation is under control, as indicated by government regulations, public health orders, and industry/social triggers, Destination Campbell River and their partners can restart the visitor economy in Campbell River using this rolling tourism strategy as a roadmap for how to deliver safe, valuable, and desirable experiences to new and recovering markets.

Reimagine

Restarting something means there is also an opportunity to reimagine, address challenges, and leverage opportunities. Campbell River's brand is linked to its identity. Its identity and values won't change. Campbell River's link to the natural environment and strong community ties could make this destination more attractive than before. And where other places might be forced to return to "business as usual", Campbell River's stage of development allows the destination to align with the new world. This process has already started by researching what high-potential niche markets are the 'low hanging fruit' for Campbell River, and values-based research has been completed for what three of these passion-targeted opportunities look like.

Strategic success can only be achieved when a destination delivers on its vision and values by offering remarkable, compelling, and quality tourism experiences. These factors combined lead to a strong destination that provides visitors with a unique destination experience. In the modern digital marketing-driven world, word of mouth is paramount. The pervasiveness of mobile phones and social media means that everyone and anyone can create content on-the-fly and tell stories about a destination. Strategically harnessing and influencing storytelling involves a solid understanding of communication methods, channels, and audiences, but is ultimately about delivering immersive, unforgettable experiences to people who will be compelled enough to become advocates for the destination.

CURRENT STATE OF TOURISM

Globally, tourism has gone through a decade of growth. The United Nations World Tourism Organization (UNWTO) estimates that tourist arrivals (overnight visitors) worldwide grew by 4% in 2019 to reach a staggering 1.5 billion. Prior to 2020, the UNWTO believed that its prediction that global tourism revenues would double between 2014 and 2030 was on track. We now know this has changed in unimaginable ways due to the global health crisis. We will continue to monitor new research and global trends during quarterly planning reviews that we can leverage and action as global travel restrictions and sentiment ebb and flow.

Global impacts of COVID-19¹

- *Before COVID-19, the tourism sector directly contributed 4.4% of GDP, 6.9% of employment, and 21.5% of service exports in OECD Countries.²*
- *International arrivals fell by 72% in the first 10 months of 2020, totalling 900 million fewer international tourists between January and October (compared with the same time period in 2019).*
- *Loss of \$935 billion US in export revenues from international tourism, more than 10x the loss in 2009 during the global economic crisis.*
- *International tourism dropped to the levels of 30 years ago.*
- *Destinations that rely heavily on international, business and events tourism are particularly struggling, with many coastal, regional and rural areas faring better than cities.*
- *UNWTO scenarios for 2021-2024 indicate a rebound in international tourism in the second half of 2021, however they estimate it will take 2.5–4 years for international arrival numbers to match 2019 rates.*

Global insights³

- *Closer:* Domestic tourism has shown positive signs in many markets since people tend to travel closer. Travellers go for 'staycations' or vacations close to home
- *New concerns:* Health & Safety measures and cancellation policies are consumers' main concerns.
- *Get away:* Nature, Rural Tourism and Road Trips have emerged as popular travel choices due to travel limitations and the quest for open-air experiences.
- *Last minute:* Last-minute bookings have increased due to volatility of pandemic-related events and the travel restrictions.
- *Younger travellers most resilient:* Change in demographics: travel recovery has been stronger among younger segments. 'Mature' travellers and retirees will be the most impacted segments.
- *More responsible:* Sustainability, authenticity and local hood: Travellers have been giving more importance to creating a positive impact on local communities, increasingly looking for authenticity.

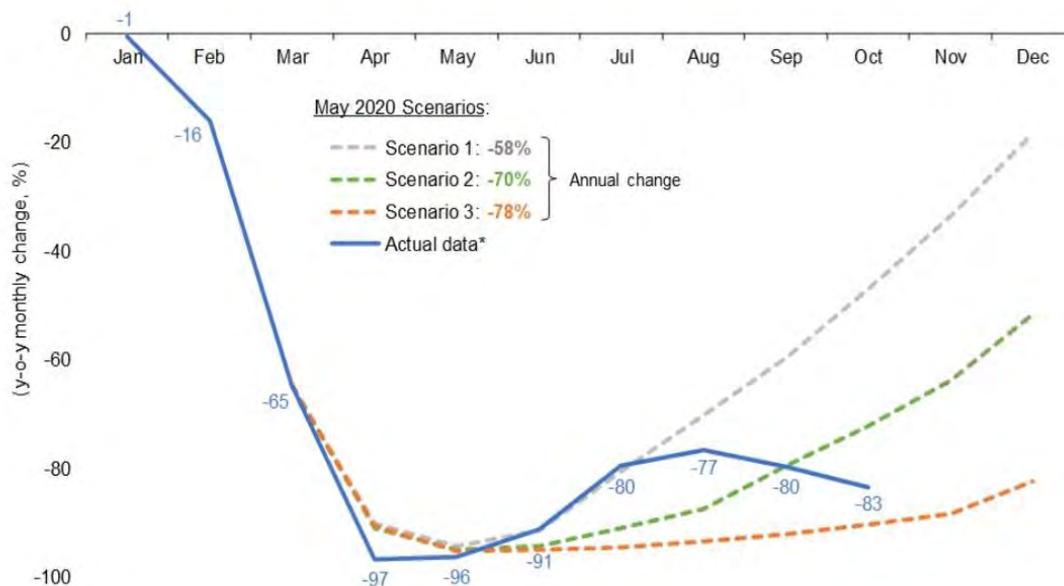
¹UNWTO <https://www.unwto.org/covid-19-and-tourism-2020>

²OECD (2020), "Mitigating the impact of COVID-19 on tourism and supporting recovery", *OECD Tourism Papers*, No. 2020/03, OECD Publishing, Paris

³UNWTO <https://www.unwto.org/covid-19-and-tourism-2020>

Forward-looking scenarios 2020

International tourist arrivals in 2020: YTD results and scenarios (y-o-y monthly change, %)



Source: World Tourism Organization (UNWTO)

(Data collected December 2020)

* Actual data through October includes estimates for countries which have not yet reported monthly results.

National forecasts and trends

Canada's tourism sector was the hardest hit by border closures, air access and travel restrictions. Its contraction in the second quarter of 2020 was 6 times larger than the economy as a whole.⁴ In Q3 2020, domestic tourism accounted for 98.6% of total tourism spending. This was slightly higher than the 98.3% recorded in Q2. Pre-2020, the average domestic tourism share was 79.1%.⁵

Three models have been proposed for tourism recovery in Canada at the time of the writing of this document. Negating the January 2021 and April 2021 border reopening scenarios, we can focus on October 2021, at which time **recovery to 2019 levels are not expected until 2026.**

Outbound conversion to domestic travel is expected to add a total of \$14 B between 2021 and 2025. **Canadians travelling domestically instead of abroad will be key to offset losses.**

Domestic demand is expected to recover faster than international demand. Based on the assumption of a gradual reversal of the pandemic, the roll out of the COVID-19 vaccine, testing at airports and lifting of travel restrictions, significant improvement in traveller confidence is anticipated for the middle of 2021.

⁴The Daily — National tourism indicators, third quarter 2020
Up in the Air: Travel Markets Tourism Outlook—December 2020

⁵ COVID-19 Research Roundup
Destination Canada's Visitor Demand Forecast Update – November 2020

Forecasted Demand:⁶

Destination Canada published results of a national survey undertaken in August 2020 to measure inter- and intra-province tourism demand, resident sentiment and Net Promoter Score. **BC and Vancouver Island performed better in comparison to other provinces in Canada for both aided consideration (travel within the next year) and active planning.**

Provincial trends⁷

Based on the Destination BC 2019 Value of Tourism report, there were nearly 20,000 tourism-related businesses in operation in the province in 2019, a 2.2% increase over 2018, and the industry employed nearly 150,000 people, a 1.8% year-over-year increase.

In 2019, GDP for the provincial economy as a whole grew 2.5% over 2018. The tourism industry contributed 3.4% or \$8.7 billion of value added to the BC economy, as measured through GDP (in 2012 constant dollars). This represents 3.4% growth over 2018, and 41.8% growth since 2009. In 2019, tourism contributed more to GDP than any other primary resource industry (Forestry \$1.6b, Agriculture & Fishing \$3.3b, Oil & Gas \$4.9b, Mining \$5.1b).

BC travel behaviours:

- In Q4 2020, 25% of BC residents took one or more trips within the province. Only 5% of residents have reported trips to other provinces. This number is down from summer in 2020, where 44% of residents had travelled in BC.
- 86% of BC residents intend to travel to nearby communities in BC in the next 12 months, 74% intend to travel elsewhere in BC in the next 12 months. Both these statistics are up from the previous research period.

2021 BC Sentiment toward visitors:⁸

- British Columbians remain hesitant toward welcoming most visitors.
- In Destination Canada's Wave 28 (May 11, 2021) report, 77% of British Columbians said they would welcome visitors travelling to their community from nearby communities, with 58% being welcoming of visitors from other parts of the province. Only 29% of BC residents would welcome visitors from other parts of Canada. All these numbers are slowly trending upward.
- When asked what protocols would make them more comfortable, BC residents said:
 - Local businesses following all protocols/requirements (84%)
 - International & Canadian visitors vaccinated (83%)

⁶2020 Global Tourism Watch COVID Special Survey

⁷2019 Value of Tourism

⁸Response Signals & Sentiment Dashboard

Campbell River economic and tourism conditions

Campbell River Visitor Trends

Destination Campbell River contracted Mobilescapes to analyze our visitor profiles in 2019, based on mobile devices, resulting in the following profile:

Category	BC Visitors - 2019
Estimated Visitor Volume and %	<ul style="list-style-type: none"> 62,200 or 85% were from BC
Top Visitor Origin Locations	<ul style="list-style-type: none"> Courtenay Nanaimo Saanich Comox Vancouver Victoria West Bay Surrey Burnaby Richmond Powell River Port Alberni Squamish Parksville
Top PRIZM Segments	<ul style="list-style-type: none"> Scenic Retirement Country & Western Boomer Bliss Indigenous Families Down to Earth Suburban Sports Slow Lane Suburbs Just Getting By Suburban Recliners Savvy Seniors
Top EQ Types	<ul style="list-style-type: none"> Rejuvenators Gentle Explorers Authentic Experiencers

BC Visitor Profile Summary Highlights

- British Columbia was the primary origin of Campbell River Area Visitors, making up 95% of visitation in shoulder seasons (January-May/October-December 2019), and 88% in June-September 2019 and 93% in 2020
- (When Campbell River was removed from the analysis BC made up 85% of visitation in 2019)
- Courtenay, Nanaimo and Saanich were the top three visitor origin markets in 2019 (all periods) and 2020. Comox, Saanich, Victoria and Vancouver were also key markets during all time periods
- The top three PRIZM Segments visiting the Campbell River Area in January-May/October-December 2019 were: Scenic Retirement, Country & Western and Boomer Bliss. The top three for June-September 2019 were: Scenic Retirement, Boomer Bliss and Suburban Sports. The top three for 2020 were: Scenic Retirement, Suburban Sports and Boomer Bliss.
- Scenic Retirement are typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography, Canoeing and Kayaking
- Suburban Recliners are typically suburban, downscale singles and couples (many are retired Empty Nesters) who enjoy community theatre, national/provincial parks and casinos
- Boomer Bliss are typically middle-aged couples and families with children (ages 10+ at home), who enjoy

cycling, restaurants and eco-friendly products

- Suburban Sports are typically middle-aged couples and families, who enjoy outdoor activities, such as Camping, Fishing/Hunting, Cross Country Skiing/Snowshoeing
- Country & Western are typically middle aged, below average income travellers who enjoy: Snowmobiling, Hiking, Camping, Boating
- The top three EQ Types visiting the Campbell River Area in January-May/October-December 2019 were: Rejuvenators, Gentle Explorers and No Hassle Travellers. The top three for 2019 (when locals were removed) and 2020 were: Rejuvenators, Gentle Explorers and Authentic Experiencers

AB Visitor Profile SUMMARY HIGHLIGHTS

Alberta was the secondary origin of Campbell River Area Visitors, making up 3% of visitation in January-May/October-December 2019, 7% in June-September 2019 and 5% in 2020

Calgary, Edmonton and Wood Buffalo were the top visitor origin markets in 2019. Calgary, Edmonton and Grande Prairie were the top visitor origin markets in 2020.

The top three PRIZM Segments visiting the Campbell River Area in January-May/October-December 2019 were: Agri-Biz, New Country and Modern Suburbia. The top three for June-September 2019 were: All-Terrain Families, Modern Suburbia and Family Mode.

The top three for 2020 were: Suburban Sports, Savvy Seniors and All- Terrain Families:

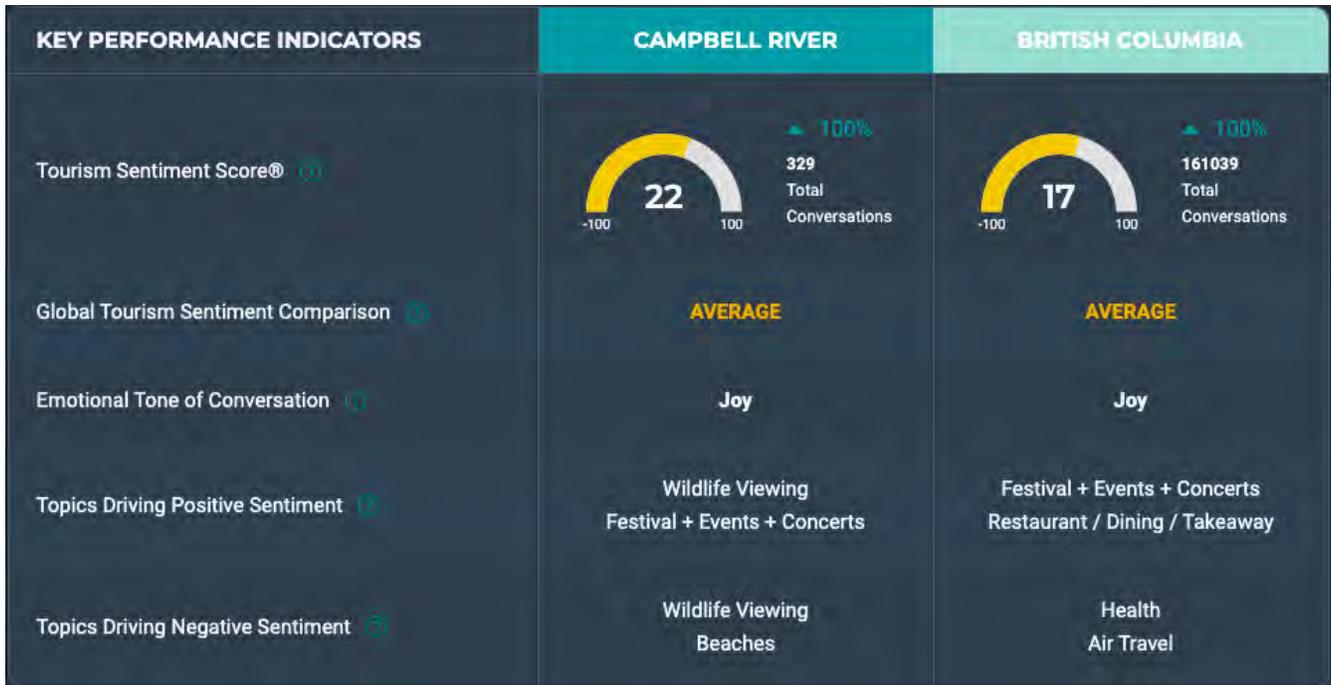
- Suburban Sports are typically middle-aged couples and families (with children of all ages at home). They value community involvement and companies that treat their employees fairly
- Family Mode are typically Middle-aged couples and families with children (ages 10+) at home. They value outdoor adventure and interacting with people from different cultures
- Savvy Seniors are typically Upper-Middle-income Seniors in Urban Apartments. Nearly 40% of maintainers are over 65, who enjoy golf, camping, hiking and visiting parks/gardens
- All-Terrain Families are typically Younger and Middle-Aged couples and families with children under the age of 15, who value hard work, and the thrill of purchasing, and are often impulse shoppers
- Modern Suburbia are typically Younger and Middle-Aged, diverse families with younger children who value trying new and exciting products and Pilates/yoga
- Agri-Biz are typically Middle- income farmers and blue-collar workers, who enjoy fishing/hunting, boating and camping
- New Country are one of the wealthiest rural segments in Canada, typically between the ages of 45-64 years old who value Community involvement and purchasing from small businesses
- The top three EQ Types visiting the Campbell River Area in January-May/October-December 2019 were: Rejuvenators, Free Spirits and No Hassle Travellers
- The top three for June-September 2019 were: Free Spirits, No Hassle Travellers and Rejuvenators
- The top three for 2020 were: Gentle Explorers, Authentic Experiencers and Rejuvenators

Tourism Sentiment Index (TSI)

The Tourism Sentiment Score™ measures attitudes toward the tourism offering of a destination. Tracking this score over time against a competitive destination set will provide insight into the ability of Campbell River to build on its positive reputation and minimize challenges. It also indicates where we Over and Under-index on products and experiences based on the volume and promoters/detractors talking about Campbell River online.

The TSI Live sentiment score compared to BC and top 3/bottom 3 sentiment drivers are as follows:

Benchmark at March 30, 2020:



UPDATE at APRIL 30, 2021



Rate & occupancy

According to Smith Travel Research, Occupancy and rate clearly suffered in 2020. While this was expected to decline from 2019 by at least 50% cumulatively through 2020 when restrictions were first announced in March 2020; since then, actual percentage of occupancy in Campbell River was down from the year prior by 14.8%.

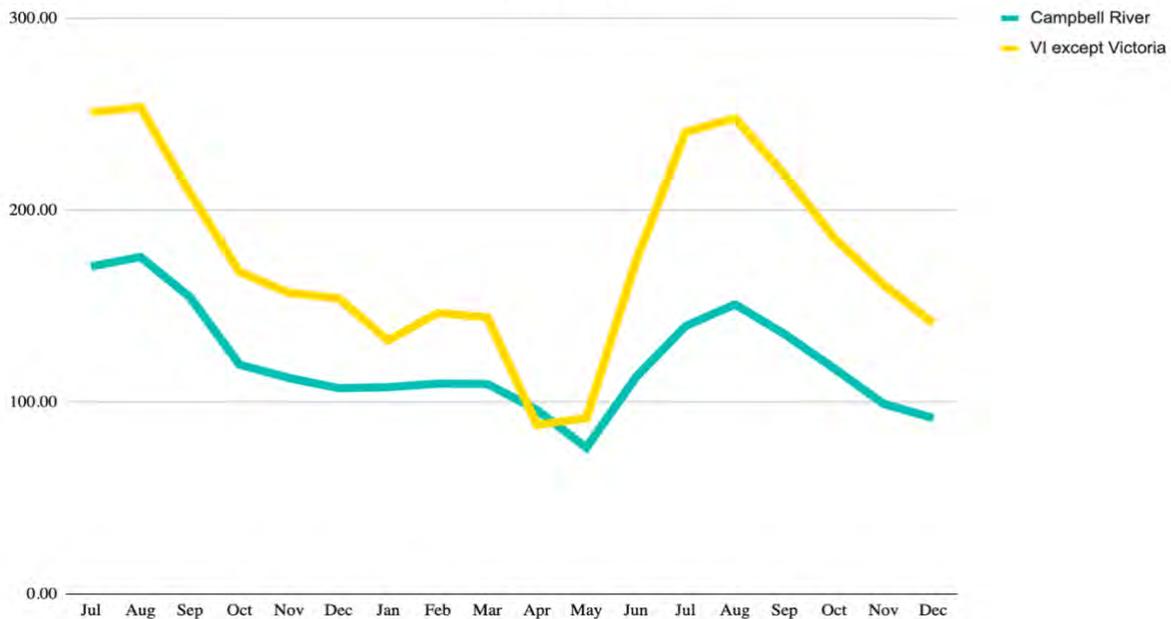
Source: STR Trend report at [December 2020](#)

Occupancy Comparison



Average Daily Rate (ADR) is another indicator of accommodation competitiveness and performance. Campbell River's ADR has remained lower than the Vancouver Island and Provincial averages for the last several years, in part due to the comparisons of high-rate resort experiences in places like Parksville and Campbell River, of which Campbell River does not have the size or scale of properties to generate these revenues. As expected, Campbell River finished off the 2020 year showing an ADR of just \$113, compared to the VI average of \$145.

ADR Comparison



Source: STR Trend report at [December 2020](#)

Campbell River Accommodation Inventory

The room census data provided in Appendix 1.3 demonstrates Campbell River has a total room inventory of 608 rooms at 18 properties in the City of Campbell River at hotels, motels, and inns with more than four rooms.

Using the AirDNA Marketminder platform, - Short-term VR's [Combined report data Aug 2016 - Feb 2021](#) showed

- Studio and one bedroom entire place rentals of which AirDNA believes are the type of listings most likely to compete directly with hotels, aka "Hotel comparable available rooms" grew from 9 listings (Aug 2016) to as high as 35 (March 2020).
- The hotel comparable listings add roughly 25 more rooms to the community room inventory.
- Total available listings for rent in Campbell River reached as high as 95 listings in July and August 2019.

This is important to note as the increase in private short-term vacation rentals competing directly with traditional hotels and motels impacts occupancy and rate indicators for reporting purposes, but it also adds inventory and competition to the destination, and has contributed to the MRDT collection in the City of Campbell River since October 2018. This acknowledged, there is a proportionately low volume of eligible OTA dollars generated in the City of Campbell River, so as per consultation with the Tourism Advisory committee and endorsed by Council, the DMO will continue to dedicate all efforts to destination marketing, management and visitor experience programs, and is not considering exploring affordable housing projects with MRDT dollars at this time

Shifting visitor trends

The Organisation for Economic Co-operation and Development (OECD) identifies the following long-term tourism policy implications relevant to Campbell River

- Sustainability (driven by natural areas & regions).
- Domestic Tourism (as we inch to recovery, and for those with lower funds due to the recession).
- Safety and hygiene: people are likely to prefer private solutions when travelling.
- Digitalisation in tourism services (including automation, contactless payments, virtual experiences). Real-time information will be very important.
- Flexibility: tourism providers will need to be more agile (eg. flexible bookings).

Close to home travel

A recent report from the European Commission Joint Research Centre (JRC) on tourism behaviours similarly showed new preferences for low tourist density destinations and outdoor activities away from big cities and in regions with a safer image in terms of COVID-19 circulation.

Nature experiences

- Year-round nature experiences align with the desire for time outdoors and promotes longer stays (including mid-week, a strategic priority outlined by Destination Canada). These types of trips provide opportunities to visitors to understand their home better.
- Booking.com study: "46% of travellers will take the time to appreciate the natural beauty of their home country. Whether travellers decide to stay local or not, half of those asked intend to travel somewhere they've already been."

Travel like a local

- Staycations, workations and road trips:
 - 61% of BC Residents feel comfortable travelling to nearby communities (January, 2021)
- Booking.com: “These travellers are mostly looking for accommodations that have home office facilities, fast Wi-Fi, and, most importantly, a beautiful view or cozy area to make the work day fly by.”
- Booking.com: “47% of people still plan to travel within their own countries over the medium term (the next 7–12 months), with 38% planning to do so in the longer term (over a year).”
- Opting for home-like accommodation, over hotels. (Looking for a home away from home)

Digital applications

- Continued use of the Campbell River App, reflective of real-time information, and updated with topical and seasonally appropriate information.

Transportation and Access:

From Vancouver via BC Ferries connectivity through Victoria and Nanaimo, short-haul, drive market:

- Tsawwassen - Duke Point via Nanaimo
- Horseshoe Bay - Departure Bay
- Seaplane to Victoria or Nanaimo: reduced flight offerings, increased safety measures in place.
- Steep decline in ferry commuters after new travel restrictions in BC in November.

The rest of Canada

- Pacific Coastal Airlines remains operational, with connectivity to YBL-Campbell River, via the YVR-Vancouver South Terminal with increased safety measures in place. Coast Mountain Air has yet to resume operations to Vancouver Island since the pandemic temporarily closed the Campbell River Airport in March - June 2020, and has expressed they have no plans to return to Campbell River at this time.
- YQQ-Comox Valley Regional Airport, remains focused on securing new direct access routes with Westjet via Calgary and Edmonton, and has secured a Comox-Toronto direct flight for 2021.
- Air Canada has not resumed flights via YQQ in favour of routing most flights via the Nanaimo Airport.

From the USA

- Latest forecasted predictions indicate the Canadian/US border will remain closed until at least October 2021.
- After BC (66%), Campbell River's second largest market is Washington, accounting for 6% of visitation (2016).
- All ferry options from Washington State are temporarily paused due to border closure:
 - Blackball Ferry/MV Coho Car and passenger
 - Victoria Clipper passenger ferry

Stakeholder Priorities

Key needs stakeholders expressed in the December 2020 survey:

Promotional Priorities - still relevant since 2019/20

- Protect and grow our core summer leisure business (all sectors)
- Grow the off-season short-term through events
- Grow the off-season long-term through niche market segments
- Position Campbell River as a must-stop destination for international visitors (with the focus on Europe)

Development Priorities

- Build our brand around “connectedness”
- Establish a friendship agreement with the local Indigenous nations
- Support industry in reducing their footprint
- Support the development of off-season demand drivers (e.g. events)
- Support the growth and maturation of experiences and supporting services

SWOT Analysis

Strengths

- Pristine and quintessential British Columbian location
- High quality and quantity of nature-based experiences
- Stand-out experiences, not offered in many places
- Easily accessible for its location and experiences
- City amenities and services
- Authentic ‘working town’ feel
- A tourism industry that genuinely cares about their business, place and the environment it operates
- Plenty of capacity for increased visitation
- A growing reputation and high rates of repeat visitation

Weaknesses

- Lack of vibrancy in the city and limited year-round supporting amenities and services
- Parts of the city look and feel dated and feel unsafe at night; illegal overnight camping waste/litter
- Sustainability practices are falling behind competitive destinations
- Low off-season visitation is a key obstacle to reach destination maturity
- Still relatively low awareness and reputation for Campbell River as a tourism destination in near-in markets
- Indigenous and BIPOC community members and partners under represented

Opportunities

- Visitors are looking for the type of “real” destination experience Campbell River offers (short and long-

term)

- Iconic parts of Vancouver Island suffer from visitor congestion, leading to the need for dispersion to places like Campbell River and Strathcona region
- Nature-based travellers are lower-impact travellers who spend more, stay longer and visit in the off-season
- New residents moving to Campbell River can accelerate the development and viability of services and amenities

Threats

- The environmental footprint of our industry (and city) is too high in relationship to increasing visitor expectations
- Shifts in visitor behaviour and trends in relation to long-haul travel (carbon emissions of flights)
- Unforeseen natural disasters like the COVID-19 pandemic
- Loss of resident support when growth is poorly managed
- Limited housing supply impacts seasonal and year-round staff availability

Overall Goals, Objectives and Targets

The 5-year rolling strategy (Attached as Appendix 1.2.2 identified three core goals:

1. Grow destination awareness and reputation
2. Deliver outstanding tourism experiences aligned with the brand
3. Run an efficient and effective DMO

These goals don't all have specific measures or Key Performance Indicators, but will be achieved when our objectives are met.

A challenge for many Destination Marketing Organizations is the ability to measure their objectives. That's why the collection of these specific and measurable objectives will provide us with the ability to understand if we are succeeding in our mission to achieving our vision in these next 5 years.

Our objectives are nuanced. We want to grow our visitor economy, but in the right way, without compromising the quality of the tourism experience, resident quality of life, and reducing environmental impacts. That's why we haven't set objectives or targets for overall visitation or annual revenues for instance. Growth of annual revenues for example, will be measured as an outcome, but isn't an objective unto itself.

Note: Some benchmarks and targets haven't yet been established because of the COVID-19 pandemic. They will be established before this strategy goes into effect.

Economic Objectives

- Increase the number of available inventory of beds in accommodations (currently 608; target is 800)
- Increase hotel average daily rate (ADR) (2019: \$125; 2020: \$113) target is \$150
- Maintain year-round hotel occupancy over 70% (74.9% in 2019; 57.0% in 2020)
- Increase shoulder and low-season occupancy (targets under development)
- Increase the number of year-round, locally owned businesses (benchmark needed)
- Extend opening hours for restaurants & retailers (benchmark needed)

Reputation Objective

- Increase Campbell River's reputation as a tourism destination in target markets and segments as measured by:
 - Increasing Tourism Sentiment Index score year-over-year
 - Increase the volume of online conversation >50,000 (38,000 in 2019)

Quality Objectives

- Grow Tourism Sentiment Score to measure quality (benchmark needed)
- Increase Tripadvisor reviews and ratings (benchmark needed)

Environmental Objectives

- Participate in reducing greenhouse gas emissions by the tourism industry (benchmark needed)
- Support the reduction of waste in the tourism industry (benchmark needed)

Collaboration Objectives

- Develop a Friendship Agreement with local Indigenous nations
- Participation rate of >80% of tourism businesses as registered stakeholders for Destination Campbell River
- Conduct an annual survey amongst residents to measure support levels for tourism (benchmark based on 2021 Resident Satisfaction Survey - no data yet available at submission)

Governance Objectives

- Meet obligations related to the governance model and City contract
- Maintain a 5% operating reserve to ensure fiscal responsibility with regards to seasonal cash flow and MRDT recovery uncertainty
- Leverage grant funds and sponsorships at a minimum of \$100k over the budgeted MRDT annually
- Keep administrative costs <20% annually

Strategies

One of the key challenges of destination marketing is a lack of focus. Too many stakeholders, pulling DMOs into every direction, leads to watered down activities, aimed to please everybody all the time, can result in generic promotions and a lack of progress.

The 5-year rolling strategy is the guideline for focus in meeting our objectives. The plan has identified the following 9 strategic actions that provide our current focus:

DESTINATION EXPERIENCES

In keeping with the vision and values previously stated in this document, a key objective over the next five years is to mature the Campbell River tourism economy in close alignment with nature focused travellers. The following points can guide action towards achieving alignment with this objective, and are detailed in the Project Plan section below.

1. Deliver experiences based on the principle of interconnectedness
2. Establish a Friendship Agreement with local Indigenous nations to ensure that tourism objectives include, value, and benefit Indigenous communities in Campbell River
3. Reduce, offset, and drawdown CO2 emissions while eliminating waste and other environmentally harmful business practices

4. Build an annual capacity and demand plan and develop experiences to fill seasonal gaps
5. Grow and mature experiences and supporting services

DESTINATION REPUTATION

1. Align all Campbell River storytellers with the brand and the brand themes
2. Ensure Campbell River maintains and protects core summer business
3. Ensure Campbell River is part of long-haul visitor itineraries, especially in Western Europe
4. Stimulate a four-season reputation through niche promotions

Meeting our objectives by delivering on these key actions is outlined in the Five Year Rolling Strategy document attached

Conclusions

Based on the data and information collected, and summarized above, these three core conclusions emerge for our strategic direction over the next 5-years.

1) There is room to grow

Prior to the pandemic, tourism in Campbell River had grown year-over-year consistently, but hasn't reached maturity. Unlike other places on Vancouver Island, there is capacity for further growth in visitor numbers, particularly in the off-season. The desire to develop Campbell River into a stable year-round destination would help achieve the goals of using tourism to diversify the local economy. The Campbell River region is in the process of building the tourism infrastructure to connect visitors to transformative and compelling experiences all 12 months of the year. And even though the COVID-19 crisis might be a significant setback, the destination is gifted with the opportunity to be pragmatic, and focus on creating a sustainable and viable destination. Just like the City of Campbell River investing in Economic Development initiatives to attract new residents, entrepreneurs, tech innovation and small businesses, the city is well-positioned to become the next wave of tourism expansion on Vancouver Island.

2) Quality of life

Tourism contributes to improving local quality of life for Campbell River residents. It can bring more high-quality, year-round jobs, leading to income stability and career opportunities. Funding models and revenue from tourism help to further revitalize the downtown core, bring more vibrancy to the city with events and attractions, and beautify the city with more green spaces. While these steps make the destination more attractive for visitors, they also benefit locals and increase pride of place. For example, boat launches, bike lanes, the seawalk, trail systems and parklets are all shared amenities that are used and enjoyed year-round by locals. Additionally, tourism can be a catalyst to expand arts and community spaces, support Indigenous cultural revitalization, and develop education

3) Environmental considerations

Any economic growth from tourism in Campbell River needs to prioritize sustainability simply because the natural environment is the destination's key asset. This is the moment to take a stand with environmental leadership and make careful development decisions. There is a strong history of conservation in Campbell River, and tourism stakeholders and community members alike are increasingly calling on the tourism industry to lead environmental preservation and protection movements. This can occur within the community, through the collective stewardship of environmental assets and inspiring action by leading sustainability practices. Outside the community, Campbell River's long standing conservation ethos can set an example for practical stewardship amidst the growing concerns about the global impact of tourism in the age of the climate crisis.

Section 2: Five-Year Strategic Overview

Strategies - Key Actions

Destination & Product Experience Management

Key Actions:

Year One

- Maintain industry memberships with TIABC, TIAC, BCDMOA
- Attend tourism industry and advocacy events
- Establish Festival & Events Services support criteria
- Align creative assets and resources with the Island North Film Commission, tournament, festival and event organizers
- Continue to advocate, and research options, to expand transportation options to/within Campbell River
- Support/encourage tourism business to utilize Campbell River-specific toolkits, and distribute Tourism VI, DBC and Destination Canada alignment opportunities to registered stakeholders
- Establish working groups and development of plans for Fishing 2.0, Cold Water Diving and Nature-based traveller market segments
- Collaborate with industry to develop an annual capacity and demand dashboard
- Develop a set of criteria to assess off-peak events and experiences for promotional activities (festivals, events, sports, film, meetings)
- Benchmark Campbell River's tourism industry' environmental footprint
- Benchmark the number of Campbell River's year-round, locally owned businesses and create a benchmark inventory of opening hours for bars and restaurants

Year Two (2023)

- Invest in the support of off-season events to make them visitor ready where identified
- Collaborate with relevant industry and non-industry stakeholders to implement niche market segment plans
- Identify further niche market segments to move forward with in the development of the off-season
- Conduct a detailed assessment of key categories to identify development obstacles to reach destination maturity and present this assessment to stakeholders
- Collaborate with industry to set environmental footprint targets and develop a plan to reach these targets

Years Three-Five (2024-26)

- Maintain industry memberships and attend meetings and events
- Establish Festival & Events Services support model and criteria
- Provide Festival & Event coaching and assistance to support visitor-facing events proven to support incremental tourism benefits
- Continue to advocate, and research options, to expand transportation options to/within Campbell River

- Support/encourage Chamber to promote tourism business development support materials to members
- Participate in Economic Development strategic discussions to ensure Tourism's needs and opportunities remain relevant in Economic Development Strategic Plan and priorities
- Collaborate with stakeholders in finding support, funding and development of plans to reach destination maturity
- Establish working groups for additional market segments and create niche marketing plans and implement plans
- Support industry in their effort to lower our collective environmental impact by finding financial support and access to knowledge and resources

Governance & Corporate Responsibility

Key Actions:

Year One (2022)

- Ensure effective governance, conduct annual review, update strategic planning, complete required grant, MRDT and CoOp reporting
- Engage in Destination BC cooperative program opportunities
- Enhance professional development and skills training
- Review and update staff roles and responsibilities, reallocate duties and resources as required
- Continue to dedicate all MRDT dollars to destination marketing, management and visitor experience programs; DMO is not considering affordable housing projects with limited OTA dollars at this time

Year Two (2023)

- Ensure effective governance, conduct annual review, update strategic planning, complete required grant, MRDT and CoOp reporting
- Engage in Destination BC cooperative program opportunities
- Establish succession plan for staff, Tourism Advisory Committee
- Enhance professional development and skills training

Years Three-Five (2024-26)

- Ensure effective governance, conduct quarterly and annual reviews, update rolling strategy, complete required reporting
- Explore additional non-MRDT funding sources (WED, ICET, etc.)
- Establish role in Community Crisis Communications Plan
- Grow Film, Sport, Event opportunities

Marketing/Promotional Activities

Key Actions:

Year One (2022)

- Conduct a lightweight digital strategy and develop new website
- Maintain social media channels
- Maintain and enhance media relations activities
- Support consumer shows through branded promotional tools; distributed through niche partnerships and stakeholder attendance, prioritizing European markets
- Produce undated print materials for distribution
- Continue data-driven digital programmatic advertising

- Limited print and broadcast advertising in key markets
- Grow the Campbell River Ambassador Program to create and inspire authentic community content
- Deliver an in-market stunt advertising/guerilla marketing campaign
- Support and invest in BC & National recovery campaigns
- Continue to grow the Strathcona regional always-on initiatives to ensure inclusion and dispersion across the Region
- Support Tourism VI and stakeholder travel trade opportunities: e.g. Rendezvous Canada, Canada's West Marketplace
- Provide in-kind Festival & Event marketing assistance to a minimum of two events proven to support incremental overnight visitation
- Establish a "European market advisory group" to identify tactics to reach the European market effectively within our budget constraints
- Establish working groups and development of plans for Fishing 2.0, Cold Water Diving and Nature-based traveller market segments

Year 2 (2023)

- Invest in promotional activities related to niche market segment plans
- Re-evaluate promotional timing based on the capacity and demand calendar, including methods to measure accurate occupancy rates
- Execute European market tactics, identified by the advisory group

Years Three-Five

- Maintain and enhance website
- Maintain social media channels
- Media relations support, story starters, editorial fact checking, asset provision, travel journalist outreach and inbound hosting
- Consumer shows: branded materials distributed through niche partnerships and stakeholders/consortiums attending
- Design and content updates, printing, distribution of print materials
- Paid search marketing
- Programmatic digital advertising
- Engage in travel trade opportunities as they become available
- Monitor and pursue meeting and incentive travel markets as opportunities arise
- Maintain Campbell River brand standards guidelines; distribute to partners
- Provide in-kind Festival & Event marketing assistance to integrate shoulder season, visitor-facing events proven to drive overnight visitation and support incremental tourism benefits
- Invest in promotional activities related to niche market segment plans
- Re-evaluate promotional timing based on the capacity and demand calendar
- Execute European market tactics, identified by the advisory group

Collaboration & Strategic Partnerships (Industry & Stakeholder Support)

Key Actions:

Year One (2022)

- Engage directly with stakeholders to increase partner participation in subsidized programs
- Collaboration with Wei Wai Kai, We Wai Kum, Homalco, Klahoose and other First Nations on establishing shared understanding for communication and protocols, destination development vision, and marketing partnerships
- Increase communications with Campbell River airport (YBL)
- Maintain communications and marketing partnership with Comox Airport (YQQ)
- Conduct semi-annual program reviews with registered industry stakeholders, Tourism Advisory Committee and City of Campbell River Council
- Maintain Campbell River Ambassador relationships and @humansofcampbellriver storytelling collaboration
- Maintain two-way stakeholder communications/ presentations/ marketing and media opportunities and general industry information sharing through regular outreach, e-newsletters, Stakeholder Facebook Group, and Stakeholder Portal
- Establish a “European market advisory group” to identify tactics to reach the European market effectively within our budget constraints

Year Two (2023)

- Engage directly with stakeholders to increase partner participation in subsidized programs
- Collaboration with Wei Wai Kai, We Wai Kum, Homalco, Klahoose and other First Nations on establishing shared understanding for communication and protocols, destination development vision, and marketing partnerships
- Start the process of developing a Friendship Agreement (or equivalent) based on a process led by our First Nations
- Maintain two-way stakeholder communications/ presentations/ marketing and media opportunities and general industry information sharing through regular outreach, e-newsletters, Stakeholder Facebook Group, and Stakeholder Portal

Three-Five (2024-26)

- Engage directly with stakeholders to increase member participation in programs
- Produce and distribute value of tourism materials to stakeholders and residents
- Maintain collaborative relationships with regional partners, Chambers of Commerce and DMOs
- Participate in all Tourism Advisory Committee meetings
- Conduct semi-annual meetings with City of Campbell River
- Membership communications/presentations/information sharing

Visitor Experience Program

Key Actions:

Year One (2022)

- Oversee/develop visitor services delivery in main Shopper’s Row location, and align seasonal mobile community activation program “Toasty” with brand standards and Campbell River Collection objectives
- Maintain existing visitor centre, programming and staff; there are no capital or infrastructure costs included in the visitor centre budget
- Grow retail sales program
- Support delivery of Campbell River Collection themed itineraries and mobile app point rewards system
- Distribute (undated) Discovery Guide, tri-fold brochures, and stakeholder collateral through digital, mail, and physical locations

Years Two-Five (2023-26)

- Evaluate existing visitor centre, programming and staff for efficiencies and ongoing value to the community
- Enhance retail sales program
- Support delivery of Campbell River Collection themed itineraries and mobile app point rewards system
- Incorporate new technology and innovations to enhance interactive visitor services information delivery
- Examine partnership opportunities with BC Parks, Chamber of Commerce, business community and brands to enhance viability and relevancy of visitor centre model

Market Research

Key Actions:

Year One (2022)

- Conduct stakeholder satisfaction survey
- Monitor and subscribe to Tourism Sentiment Index Live dashboard (in lieu of Net Promoter Score)
- Monitor and invest in Smith Travel Research & AirDNA occupancy and rate indicators
- Consult with Tourism VI and Destination BC to leverage Campbell River inclusion in broader planned research projects

Year Two (2023)

- Conduct Stakeholder Survey
- Monitor and subscribe to Tourism Sentiment Index Live dashboard (in lieu of Net Promoter Score)
- Conduct awareness and desirability study in BC/AB
- Explore tourism economic impact assessment (budget dependant)
- Conduct Passionography for newly identified market segments

Years Three to Five (2024-26)

- Conduct Stakeholder Survey
- Monitor and subscribe to Tourism Sentiment Index Live dashboard (in lieu of Net Promoter Score)
- Conduct Festival & Event impact assessments
- Evaluate and monitor new and return visitation; conduct awareness and desirability study in BC/AB

Brand Positioning

CAMPBELL RIVER'S PLACE DNA®

Place DNA® is a city's identity. It is the truth of a place; it's who that place really is. A city that ignores its Place DNA® risks losing brand authenticity and credibility. It is likely to build experiences that are disconnected from its identity, while its city marketing makes promises it cannot fulfill. Destination Think has worked closely with the Campbell River tourism industry to identify a competitive positioning for Campbell River based on the city's Place DNA®.

By aligning Campbell River experiences with its Place DNA®, the tourism industry can benefit from the unique, compelling, and honest position that sets Campbell River tourism businesses and the community as a whole apart from others.

Place DNA® is not a choice; it's the essence of a place. However, a brand is a choice. It's how we want to deliver our experiences and what we build our reputation around. By rooting Campbell River's brand in its Place DNA®, we ensure that we stay true to who we are and ground our marketing in truth. Campbell River is defined by its natural environment and the impact it has on our people, culture, traditions, and economy.

Campbell River offers authentic wild nature. But unlike other places on Vancouver Island, we offer it in an accessible city, with people who are genuine and friendly. On top of that, we have an incredible First Nations living culture. This combination is hard to compete with in British Columbia or even Canada and the world.

BRAND THEMES

The principle of interconnectedness shapes the environment, community, and tourism industry in Campbell River. Here, people are deeply attuned to changing tides and weather patterns. It makes sense that they'd also be attuned to the possibilities of working with one another and with the environment they find themselves in every day. Three key themes came to light during the collaboration process that can be used to guide and elevate storytelling about Campbell River as we look towards the future. The themes capture what makes Campbell River unique and why potential travellers may be motivated to visit. They further deepen the way our Place DNA® should be represented in the way we deliver tourism experiences and promote our destination.

Towards a Natural Harmony – As its name suggests, Campbell River as a community and society has long been linked to its natural environment.

In tandem with the rapidly changing modern world, the future of Campbell River will shift again. Campbell River will become a place where everyone who lives, works, and plays here will be responsible. It will be a place where there is a natural balance between what the people of Campbell River need and what is needed to protect the region's treasured lands and waters for those who call it home. No one person can do this alone, but it is a future that can be created together. In this honouring of the past, reckoning with the present, and journeying into the future, there is a natural harmony.

Where the Wild and Life Collide – Arriving in Campbell River is like being dropped into the wild – a patch of wilderness with a city in the middle, or a city with a gigantic wilderness backyard.

Eagles soar above. Snow-capped mountains shine brilliantly when the clouds lift. Towering trees and vibrant green forests provide indescribable calm. The life cycle of salmon is on display. Waterfalls put on spectacular displays of the force of nature. The ocean teems with marine life and the air smells of saltwater. Discovery Passage is frequented by boats and whales alike. No scene is ever the same, as the weather and tides change and swirl. One can quite literally gaze upon the water and watch the world go by. Everything in Campbell River has the best of both worlds, and it's this rare collision of the beauty of the wild and modern life that makes this place so remarkable. While locals pinch themselves at the natural beauty of their home, these sights are especially astonishing for big-city dwellers and international visitors.

Slightly Out of the Comfort Zone: The Campbell River experience is authentic. That word can be overused, but in Campbell River it is entirely accurate. What you see is what you get, and the locals embrace this mentality. The people are real. The environment is real. The place is real. And post-pandemic, we're here to make real life feel really good again.

People can kick back and enjoy the comforts of the city or challenge themselves to truly epic wilderness experiences. It's up to each person; it's a choose-your-own-adventure sort of place. There's no wrong way to do it. Campbell River is a place that invigorates people, brings them past the ordinary, and nudges them ever so slightly out of their comfort zone.

For many European visitors, driving through 200 kilometers of remote wilderness is the stuff of dreams. No gas stations for hours? No traffic jams? Endless trees and atmospheric skies? Noses will be pressed against car windows. Pictures will be taken. The experience will be felt and remembered long after people return home – particularly if they happen to see a bear!

For others, going a step further out of the ordinary may mean working up to a longer hike in Strathcona Park. It may not be the steepest and longest, but it's something different than they've ever done, and it's worth every minute. Whatever ways people choose to step outside of their comfort zone in Campbell River, there are always more adventures, sights, and experiences waiting in the wings.

Target Markets

Recovery Phase (2022/23)

- Short Haul, BC drive market, visiting friends and family
- Flights from AB through YQQ
- Domestic, BC, AB, (WA)
- Winter long-stay RV/drive market
- 25-69
- PRIZM type
 - Boomer Bliss (typically middle-aged couples and families with children (ages 10+ at home), who enjoy cycling, restaurants and eco-friendly products)
 - Suburban Sports (typically middle-aged couples and families, who enjoy outdoor activities, such as Camping, Fishing/Hunting, Cross Country Skiing/ Snowshoeing)
- EQ type = Rejuvenators, Gentle Explorers, Authentic Experiencers
- Top 5 BC return markets, based on City of origin:
 - Nanaimo, Courtenay/Comox, Vancouver, Saanich, Victoria
 - Vancouver, Surrey, Burnaby, Richmond, Powell River, Squamish
- Fishing 2.0, cold water divers, nature-based travellers

Restart Phase: (2023-2024)

- Short Haul, BC, AB, WA drive market
- Flights from AB and Toronto through YQQ
- Flights from BC - YBL
- International (Europe)
- FIT/travel trade in all available source markets
- 25-69
- PRIZM type =
 - Scenic Retirement (typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography, Canoeing and Kayaking)
 - Country & Western (typically middle aged, below average income travellers who enjoy: Snowmobiling, Hiking, Camping, Boating)
- EQ type = Rejuvenators, Gentle Explorers, No Hassle Travellers
- Top 5 BC & AB return markets, based on non-VI City of origin:
 - Vancouver, Surrey, Burnaby, Richmond, Powell River and Squamish
 - Calgary, Edmonton, Grande Prairie, St. Albert, Wood Buffalo
- Fishing 2.0, cold water divers, nature-based travellers

Reimagine Phase (2024-27)

- Longer Haul, domestic and international (Europe)
- Flights from AB,ON to YQQ & YBL
- FIT/travel trade in all available source markets
- 35-69
- PRIZM type:
 - Scenic Retirement (typically older and more mature, middle-income suburbanites, who enjoy: Visiting Parks/City Gardens, Photography, Canoeing and Kayaking)
 - Boomer Bliss (typically middle-aged couples and families with children (ages 10+ at home), who enjoy cycling, restaurants and eco-friendly products)
- EQ type = Rejuvenators, Authentic Experiencers, No Hassle Travellers
- Fishing 2.0, divers, nature-based travellers and additional niche market segments
- Top 5 return markets, based on City of origin - To be updated from 2023 Visitor Profile indicators

Source: Environics Mobilescapes: Campbell River Mobile Movement Visitor Insights - March 2021 Local & Non-local analysis

Management, Governance, and Administration

Destination Campbell River will continue to run an efficient and effective Destination Marketing Organization using Destination Think's modern destination marketing approach and leveraging the professional support of the agency to ensure strategies, plans, reports, financial controls and human resources remain less than 20% of total budget. Due to the proportionately low volume of eligible online travel agency (OTA) dollars generated in the City of Campbell River, the DMO will continue to dedicate all investments to destination marketing, management and visitor experience programs, and is not considering affordable housing investments at this time.

Depending on the annual plan, informed by current priorities and most effective tactics, the DMO will use judgement to distribute its resources. As such, Destination Campbell River will lead some initiatives, take a supporting role in others, and participate where needed. The DMO will always work towards an aligned and successful industry by using industry-leading destination marketing and social media tactics; and expanding its relationship network (and funding) beyond tourism through non-traditional partnerships.

In order to make as big an impact as possible, we want to make sure that we don't leave any money or support from potential partners off the table. This is particularly important when it comes to non-traditional partnerships. Campbell River's environmental and stewardship ambitions may allow the community to leverage new opportunities, such as government grants or exciting entrepreneurial avenues.

Destination marketing is a collective effort. That's why this strategy wasn't created exclusively by Destination Campbell River, but by many industry stakeholders. This strategy intentionally leaves a lot of room for our collective imagination because we will need everyone to execute it. This will start with the development of specific industry advisory groups to provide input and insights into bringing the strategy to life. For everyone, and by everyone.

City staff and Council are active stakeholders in the development of the strategic plan as are key community stakeholders and businesses. The plan includes commitments for monitoring and evaluation that includes regular reporting to the Tourism Advisory Committee, Council, industry and the community.

DMO ROLE	ACTIVITIES	EXAMPLES
DMO leads and funds	Activities of strategic priorities that align with the role of the DMO.	Fall promotion campaign
DMO leads but doesn't fund	Activities that require skill sets the DMO possess but might not align with the role of the DMO, fall outside MRDT rules, or require funds the DMO doesn't possess.	Promotion of a one-time large scale event
DMO initiates	Activities of strategic priority that fall outside the role or jurisdiction of the DMO.	Wayfinding and signage
DMO supports	Activities that are strategically important or relevant to the tourism industry.	Modern Entrepreneur series
DMO participates	Activities important enough for the DMOs voice to be heard as a representative for the tourism industry.	Certain city planning activities

Sources of Funding

In addition to MRDT, Destination Campbell River secures funding from other sources to:

- increase the competitiveness of the budget,
- diversify the risk of something catastrophic, like a sustained travel advisory due to a pandemic, or a natural disaster, making the DMO financially vulnerable,
- demonstrate commitment to sourcing new and incremental sources of investment,
- leverage non-tax revenues to support the visitor economy in Campbell River and region.

Other sources of funding include:

- The City of Campbell River base funding - \$250k annually
- Destination BC Cooperative Marketing Partnership Program open-pool funds - \$50-\$65k annually
- Government of Canada Summer Youth Jobs grant \$0-8k annually, by application
- Retail sales from merchandise - \$5-\$20k annually
- Registered Stakeholder Program investments \$0-\$10k+
- Regional District Community partnership investments (Municipalities and Rural Areas in the Strathcona Regional District) ~\$3k
- Applicable COVID-recovery and business development grants, destination development grants - varies



CAMPBELL RIVER

ROLLING TOURISM STRATEGY

2022-2027

Revised June 2021

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BACKGROUND

Tourism has been present in Campbell River since the settlement of the region in the late 19th century. Indigenous peoples have called the area home for many thousands of years and shared their expertise of the lands and waterways with newcomers.

Destination Campbell River and everyone who works, lives, and plays in this beautiful city gathers on the traditional territories of the Laichwiltach, Klahoose, and K'omoks First Nations. We honour our relationship with these First Nations, the Homalco First Nations and all other First Nations, Métis and Inuit peoples who reside in these territories.

Campbell River has long been a gathering place for people with a shared appreciation of coastal wilderness and a pragmatic approach to life. Its first business (The Willows Hotel, 1904) welcomed sport fishers. B.C.'s first provincial park (Strathcona, 1911) was established nearby, and by 1924 the famous Tyee Club had implemented salmon fishing regulations for the increasing number of visitors. The Tyee Club is the second-oldest trophy fishing club in North America and was instrumental in building a reputation for extraordinary salmon fishing experiences that drew international and celebrity guests to Campbell River throughout the 20th century. Fishing, logging, aquaculture, mining and hydro industries have shaped the economic development of the city as it has grown and evolved throughout the past century.

The city continues to evolve. New residents and young families are drawn to a balanced quality of life. More and more people recognize the importance of caring for the natural environment that is so central to Campbell River. To quote a workshop participant, "We used to build our city facing away from the water; now we are building it facing towards it." Locals are reflecting on what it means to live here, welcome others to visit, and ensure that the beauty of this region remains for generations to come.

In 2017, a new destination marketing organization (DMO) was put in place to implement a new tourism strategy. A lot of progress has been made in a short amount of time. The dynamic team at Destination Campbell River has used modern destination marketing tactics to make the new brand shine.

The future is bright for Campbell River. The city is perfectly positioned to leverage the benefits of the visitor economy, make businesses successful, improve residents' quality of life, and protect the natural environment.



PURPOSE OF THE STRATEGY



The image above illustrates a strategy for tourism in Campbell River*. This strategy will serve as a guide for the upcoming five years, and Destination Campbell River will refer to it for investments and priorities. In tandem, stakeholders can use it to make informed business decisions.

Each year, an annual plan will be created to move everyone collectively closer to the long-term vision for tourism in Campbell River. Short-term factors, such as the economy or business performance, may influence how conservative or ambitious the aims of a given year's plan will be.

To sustainably move tourism forward in a way that benefits everyone in Campbell River, the strategy must align with the community's DNA. This is why the five-year strategy is shaped by Campbell River's core identity and place brand.

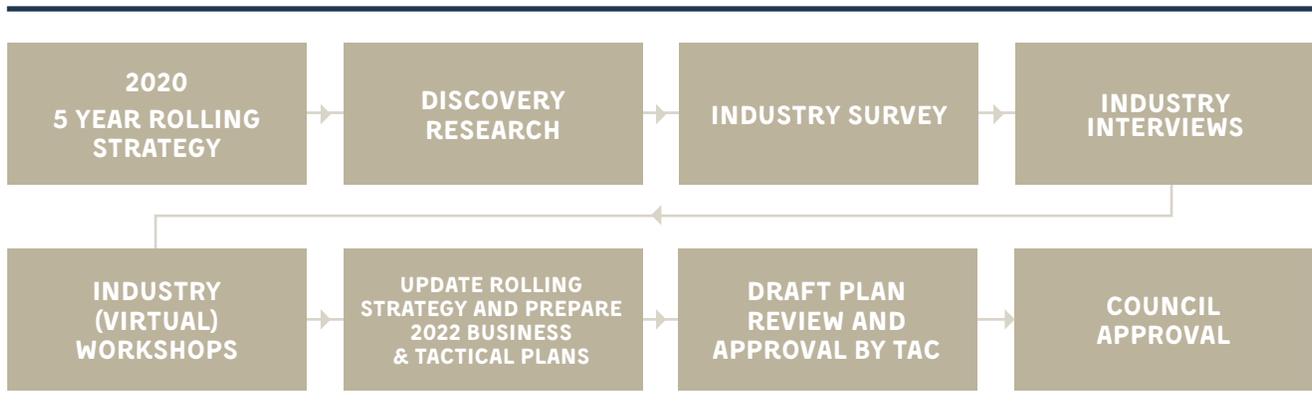
*** WHILE DESTINATION CAMPBELL RIVER HAS AN IMPORTANT ROLE TO PLAY, THIS IS NOT A STRATEGY FOR THE DMO ITSELF. THIS IS A STRATEGY FOR ALL TOURISM IN CAMPBELL RIVER AND INVOLVES EVERYONE IN CAMPBELL RIVER PARTICIPATING IN THE TOURISM ECONOMY.**

DESTINATION CAMPBELL RIVER

Destination Think was hired to develop this tourism strategy for Campbell River. The company is a strategic consultancy and marketing agency with over 10 years of experience working with innovative tourism destinations around the world. Its team of industry-leading professionals has their fingers on the pulse of global tourism trends, regularly working with organizations and residents across North America, Europe, and the Pacific to implement modern destination marketing strategy and tactics.

Destination Think has close ties to Campbell River – from the past three years running the Destination Campbell River DMO, to holding a formative company retreat with its international team here, to memorable personal holidays in the region. A passion for learning local context, a wealth of experience both in the B.C. and Canadian tourism sectors, and a forward-thinking international lens provide the perfect balance for the team to guide this strategic vision. Destination Think has ongoing engagement with the tourism industry in Campbell River, both formally and informally. It has conducted several research reports to bolster these working relationships, including the Tourism Sentiment Index (TSI), a visitor study, and a reputation study.

PROCESS



For a tourism strategy to be effective, it must draw from the wisdom and experience of everyone who will use it. As such, the development of this strategy followed a robust process that engaged both direct and indirect stakeholders. The information generated from surveys, interviews, and workshops represents a broad spectrum of perspectives. Importantly, these methods were intentionally selected to provide room for personal stories, collaboration, and healthy debate.

This strategy is the next iteration of our 5 year rolling strategy. This strategy was completed in 2020 after a robust process that involved background research, an industry survey, two town hall meetings and consultation with the Tourism Advisory Committee. The new strategy was received enthusiastically by industry in February 2020.

The intent for this strategy was to use this strategy as the foundation for this 5 year business plan. The events related to the pandemic forced us to go through a more robust process to ensure our strategy still reflects the ambition and priorities to work towards achieving our vision.

Led by our team in Campbell River, supported by Chief Strategist William Bakker, Destination Think initiated the process by researching pandemic impacts and projections for duration and our competitive positioning related to recovery. Subsequently, an industry survey, interviews and virtual town halls were conducted to gain insights, perspectives and priorities from industry.

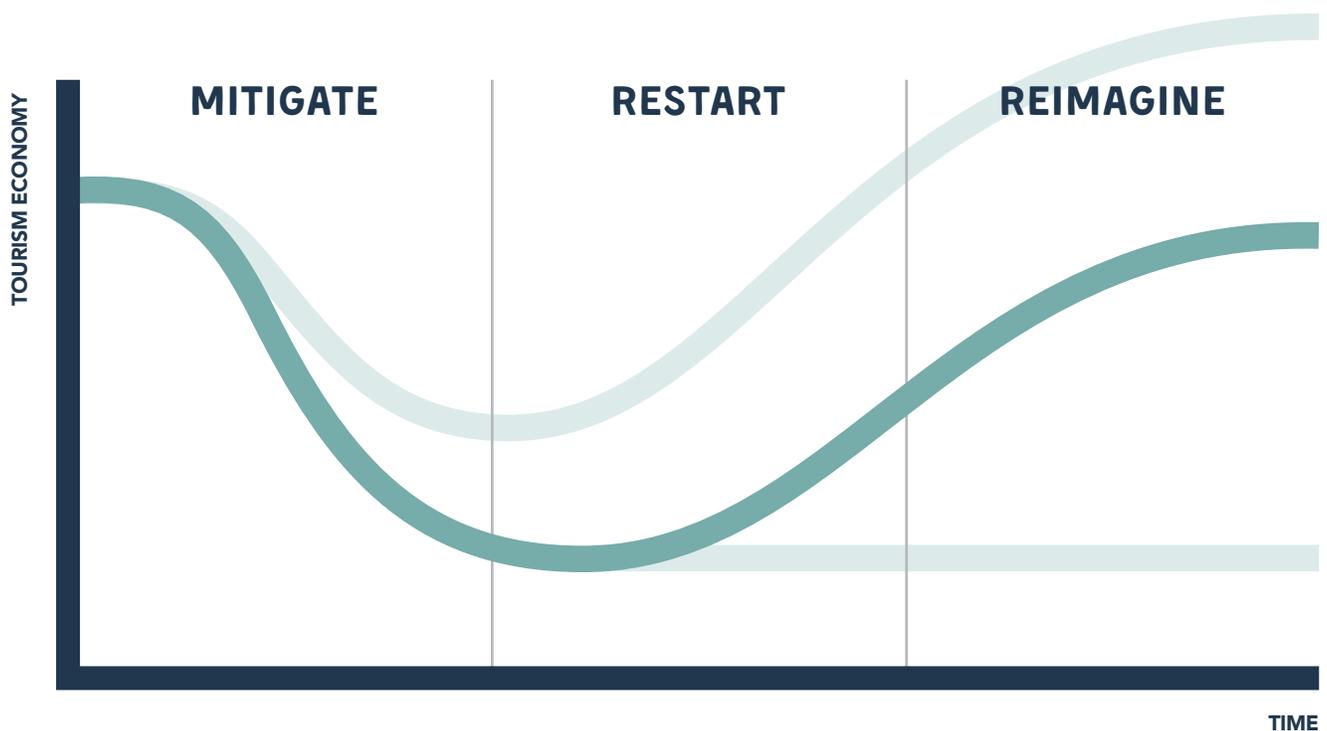
The conclusion of our process is that even though our tourism industry has suffered significantly, and still is at the time of this writing, the strategy is still relevant. Our priorities might shift slightly with the focus on a fast restart. This will be reflected in our annual plans more so this our foundational strategy.

“ WE NEED TO WORK ON YEAR-ROUND OPTIONS FOR CAMPBELL RIVER AND CREATE A ‘HOOK’ TO GET GUESTS TO VISIT US IN THE ‘OFF-SEASON.’ TOFINO HAS ‘STORM-WATCHING.’ WHISTLER HAS WINE AND FOOD FESTIVALS. WE NEED TO FIND SOMETHING WE CAN USE TO GET MORE VISITORS TO THIS PART OF THE ISLAND.”

- Survey participant

THE IMPACT OF COVID-19

This strategy is the next iteration of the 5 year rolling strategy 2022-2027, completed in early 2020, just before the start of the pandemic. This strategy has been validated and updated based on the findings of research and industry engagement in early 2021.



Destination Think's approach to planning a post-COVID-19 future can be described in the chart above. The crisis will unfold in three phases.

MITIGATE

During the writing of this document, the industry is in this phase. With travel restrictions in place, Destination Campbell River and its partners are doing everything they can to minimize the impact of the crisis. Examples include sector-specific meetings, virtual tourism town halls, weekly bulletins, regular communications with Economic Development, Chamber of Commerce, and media, as well as the amplification of partner content through social channels.

RESTART

When the health situation is under control, as indicated by government regulations, public health orders, and industry/social triggers, Destination Campbell River and their partners can restart the visitor economy in Campbell River using this rolling tourism strategy as a roadmap for how to deliver safe, valuable, and desirable experiences to new and recovering markets.

REIMAGINE

Restarting something means there is also an opportunity to reimagine, address challenges, and leverage opportunities.

As of this writing, the total impact of the crisis isn't fully known yet. Our research has concluded there will be significant damage to the tourism industry. There is genuine concern that some businesses might not be able to start back up after the crisis is over. Tourism in Campbell River, and virtually every other place in BC and the rest of the world, will look different. There is a lot of confidence and optimism in the industry that Campbell River will recover faster than other places.

Visitors might be different as well. A lack of air access could negatively affect the number of long-haul visitors. Additionally, visitors might have different needs and expectations from tourism businesses.

However, upon reviewing this document through the lens of the COVID-19 crisis, we are confident that this five-year tourism strategy is still relevant. In fact, it might be more relevant than before. In many ways, the 'Reimagining' stage has been part of this process. However, when the crisis is over and the tourism industry in Campbell River has a full understanding of COVID-19's impact on the city and industry, it will be crucial to reassess the strategy again.

Campbell River's brand is linked to its identity. Its identity and values won't change. Campbell River's link to the natural environment and strong community ties could make this destination more attractive than before. And where other places might be forced to return to "business as usual", Campbell River's stage of development allows the destination to align with the new world. This process has already started by researching what "Fishing 2.0" looks like.

Campbell River's vision doesn't change, but the timeline to realize this vision might. More ambitious ideas might need to wait a bit longer. These details will always be reflected in each annual plan. Fortunately, the outlook for the post-pandemic strength of our key experiences allows us to be more ambitious than previously assumed and therefore our core strategic objectives remain the same.

When tourism in Campbell River restarts, **this strategy forms the basis for the restart plan**. Tourism leaders in Campbell River are confident in the city, its people, and the tourism industry. Campbell River has lived through tough times before. This is a place that knows how to rebuild and reinvent. Let us do it again.

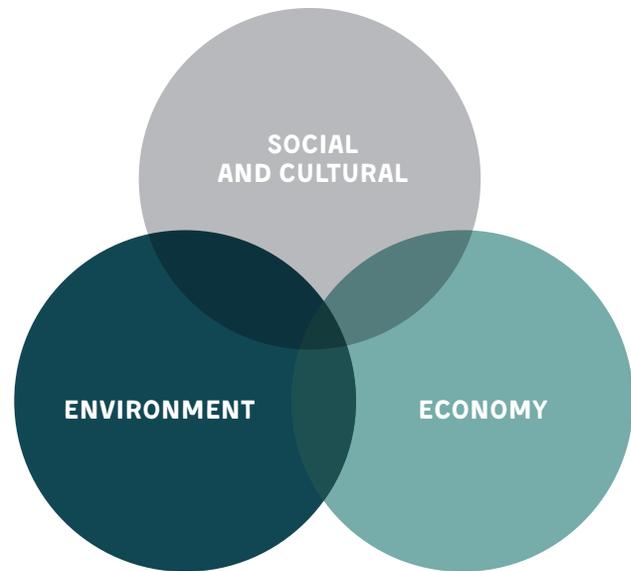
KEY LEARNING

Globally, tourism has gone through a decade of growth. The United Nations World Tourism Organization (UNWTO) estimates that tourist arrivals (overnight visitors) worldwide grew by 4% in 2019 to reach a staggering 1.5 billion¹. Prior to 2020, the UNWTO believed that its prediction that global tourism revenues would double between 2014 and 2030 was on track. Closer to home, B.C.'s tourism industry was valued at \$18.4 billion (B) in 2017, an impressive 8.4% year-over-year growth. For perspective, provincial tourism is larger (\$18.4B) than mining (\$4.9B), oil and gas (\$3.7B), forestry (\$1.8B), and agriculture and fishing (\$1.5B) combined². The B.C. government plans to grow tourism revenue to \$30-39B by 2030, an annual growth of 6%³. Municipal and Regional District Tax (MRDT) revenues in Campbell River grew by 15% in 2018 and 2% in 2019⁴. While this doesn't measure tourism growth holistically in a given destination, it does provide some evidence tourism has grown.

The COVID-19 health crisis will significantly impact tourism performance in 2020-2021. It could take years before Campbell River tourism returns to 2019 revenues. The economic impact of the crisis reaches beyond tourism. Moving forward it is important to keep in mind that the significance of tourism to economic recovery in a community is enticing and undeniable.

The impact of tourism on a place can be substantial. When this impact is positive, it means economic gains in the form of more job opportunities, income for families and local businesses, and revenue to reinvest in community infrastructure and cultural revitalization. It can also mean locals have increased pride in their home and visitors have transformative experiences that turn them into compelling advocates for a place they will never forget.

When the impact is negative, it may be because one factor is prioritized (for example, exponential economic growth) at the expense of the others (such as environmental protections or respect for cultural diversity). Additionally, in recent years the risks of over-tourism have made headlines across the globe.



While over-tourism may be easy to dismiss for destinations not overwhelmed by visitor numbers (Campbell River is not Venice or Barcelona!), it's crucial to take the core lessons of over-tourism into account.

Unmanaged tourism growth can have social and political consequences on a community if locals' quality of life is changed to an extent that they no longer support tourism. This can occur if tourism infrastructure struggles to handle a change in visitor numbers or visitors aren't properly educated about the place they're visiting (for example, parking issues for popular trailheads, newcomers ignoring boating or fishing regulations, or camping spots filling up). In order to ensure that tourism in Campbell River develops and grows in a way that consistently benefits the community, it is of utmost importance to take a holistic strategic view and seek alignment between economic, social, and environmental objectives.

The COVID-19 health crisis can bring a new perspective on tourism. More than before, Campbell River needs to make sure it is in-tune with residents' comfort level to be hosts to visitors. Collectively, the tourism industry is facing a great deal of uncertainty. Safety measures that impact operators and residents alike could become permanent as a new world is still unfolding.

¹ <https://www.unwto.org/world-tourism-barometer-n18-january-2020>

² https://www.destinationbc.ca/content/uploads/2019/10/2017-Value-of-Tourism_FINAL.pdf

³ https://www2.gov.bc.ca/assets/gov/tourism-and-immigration/tourism-industry-resources/our-tourism-strategy/welcoming_visitors_benefiting_locals_working_together_-_final.pdf

⁴ 2017/2018 based on March-December revenues. 2018/2019 based on January - November revenues

STRATEGIC CONTEXT

THERE IS ROOM TO GROW

Tourism in Campbell River has grown year over year but hasn't reached maturity. Unlike other places on Vancouver Island, there is capacity for further growth in visitor numbers, particularly in the off-season. The desire to develop Campbell River into a stable year-round destination would help achieve the goals of using tourism to diversify the local economy. The Campbell River region is in the process of building the tourism infrastructure to connect visitors to transformative and compelling experiences all 12 months of the year. And even though the COVID-19 crisis might be a significant setback, the destination is gifted with the opportunity to be pragmatic, and focus on creating a sustainable and viable destination. Just like Campbell River investing in Smart City initiatives to attract new residents, entrepreneurs, and businesses, the city is well-positioned to become the next wave of tourism expansion on Vancouver Island.

“...SUSTAINABILITY NEEDS A LOT OF WORK. IT IS VALUED WORLDWIDE, BUT CAMPBELL RIVER NEEDS TO CATCH UP. THIS STARTS WITH CITY HALL POINTING THE LEADERSHIP ARROW WITH A DESIRE AND WILL TO BECOME A TRULY GREEN CITY.”

- Survey participant

QUALITY OF LIFE

Tourism contributes to improving local quality of life for Campbell River residents. It can bring more high-quality, year-round jobs, leading to income stability and career opportunities. Funding models and revenue from tourism help to further revitalize the downtown core, bring more vibrancy to the city with events and attractions, and beautify the city with more green spaces. While these steps make the destination more attractive for visitors, they also benefit locals and increase local pride of place. For example, boat launches, bike lanes, seawalks, and parklets are all shared amenities that are used and enjoyed year-round by locals. Additionally, tourism can be a catalyst to expand arts and community spaces, support Indigenous cultural revitalization, and develop education programs.

ENVIRONMENTAL CONSIDERATIONS

Any economic growth from tourism in Campbell River needs to prioritize sustainability simply because the natural environment is the destination's key asset. This is the moment to take a stand with environmental leadership and make smart development decisions. There is a strong history of conservation in Campbell River, and tourism stakeholders and community members alike are increasingly calling on the tourism industry to lead environmental preservation and protection movements. This can occur within the community, through the collective stewardship of environmental assets and inspiring action by leading sustainability practices. Outside the community, Campbell River's environmental leadership could set an example for local stewardship best practices amidst the growing concerns about the global impact of tourism in the age of the climate crisis.

VISION

**WE ARE PROUD OUR CITY DELIVERS
LIFE-CHANGING, POSITIVE IMPACT
TOURISM EXPERIENCES THROUGH
PRACTICAL STEWARDSHIP**

VISION

The vision statement for tourism in Campbell River was recently updated to reflect the city's pride and dedication in delivering life-changing, positive-impact tourism experiences through practical stewardship.

The new vision statement is a reflection of the ambitions of Campbell River's tourism industry. We will work together to lead the industry and, in turn, the community, to prioritize a future where we live in harmony with the natural environment. Additionally, the statement clarifies what draws visitors to Campbell River (a life-changing, zero-impact tourism experience). This enables the industry to focus on attracting the right kind of visitor – one who shares our values and will treat our home with respect.

STRATEGIC APPROACH

Strategic success can only be achieved when a destination delivers on its vision and values by offering remarkable, compelling, and quality tourism experiences.

These factors combined lead to a strong destination that provides visitors with a unique destination experience. In the modern digital marketing-driven world, word-of-mouth is paramount. The pervasiveness of mobile phones and social media means that everyone and anyone can create content on the fly and tell stories about a destination. Strategically harnessing and influencing storytelling involves a solid understanding of communication methods, channels, and audiences, but is ultimately about delivering immersive, unforgettable experiences to people who will be compelled enough to become advocates for the destination.



CAMPBELL RIVER'S PLACE DNA®

Place DNA® is a city's identity. It is the truth of a place; it's who that place really is.

A city that ignores its Place DNA® risks losing brand authenticity and credibility. It is likely to build experiences that are disconnected from its identity, while its city marketing makes promises it cannot fulfill.

Destination Think has worked closely with the Campbell River tourism industry to identify a competitive positioning for Campbell River based on the city's Place DNA®.

By aligning Campbell River experiences with its Place DNA®, the tourism industry can benefit from the unique, compelling, and honest position that sets Campbell River tourism businesses and the community as a whole apart from others. Together, we will deliver the authentic experiences that people seek.

As more people seek transformative travel that aligns with their personal values, Campbell River is well on its way to attracting eco-minded travellers who want a positive connection to natural spaces. The demand for environmentally responsible destinations exists, but there are gaps in the tourism industry being inconsistent on effectively communicating sustainable travel options to consumers. There continues to be a gap worldwide on effectively acting on sustainable tourism intentions and communicating sustainable travel options to consumers. Post-COVID-19 there may be an even stronger desire from travellers to seek out travel options that are less harmful to the environment, but there will also be more challenges to bridge the gap between intentions and actions.



“ OVER HALF (55%) OF GLOBAL TRAVELLERS REPORT BEING MORE DETERMINED TO MAKE SUSTAINABLE TRAVEL CHOICES THAN THEY WERE A YEAR AGO, BUT BARRIERS INCLUDE A LACK OF KNOWLEDGE AND AVAILABLE OR APPEALING OPTIONS WHEN TRYING TO PUT THIS INTO PRACTICE.”

- Booking.com, 2019⁵

73%+

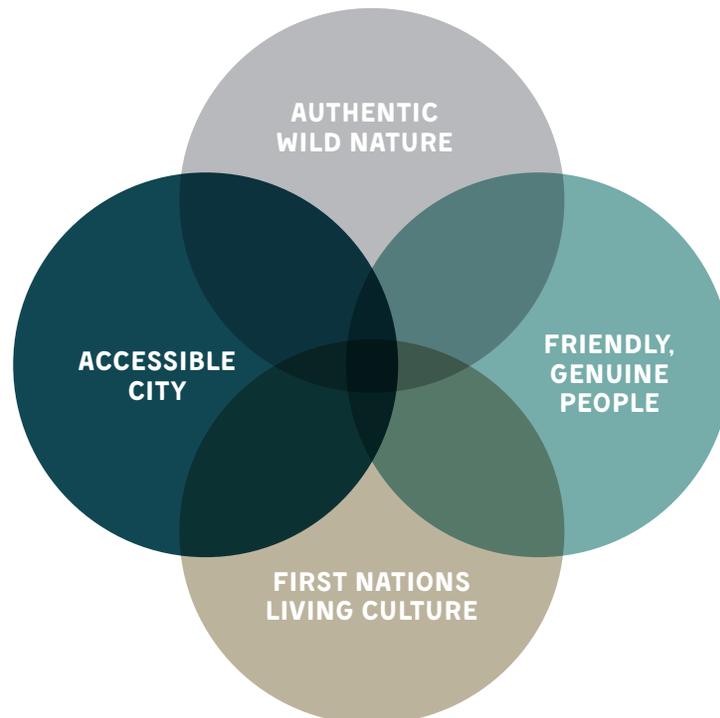
INCREASE IN SEARCHES FOR 'ECO-FRIENDLY TRAVEL' ON PINTEREST IN 2019.

5 <https://globalnews.booking.com/bookingcom-reveals-key-findings-from-its-2019-sustainable-travel-report/>

CAMPBELL RIVER'S BRAND

Place DNA® is not a choice; it's the essence of a place. However, a brand is a choice. It's how we want to deliver our experiences and what we build our reputation around. By rooting Campbell River's brand in its Place DNA®, we ensure that we stay true to who we are and ground our marketing in truth.

Campbell River is defined by its natural environment and the impact it has on our people, culture, traditions, and economy. Campbell River offers authentic wild nature. But unlike other places on Vancouver Island, we offer it in an accessible city, with people who are genuine and friendly. On top of that, we have an incredible First Nations living culture. This combination is hard to compete with in British Columbia or even Canada and the world.



THEMES

The principle of interconnectedness shapes the environment, community, and tourism industry in Campbell River. Here, people are deeply attuned to changing tides and weather patterns. It makes sense that they'd also be attuned to the possibilities of working with one another and with the environment they find themselves in every day. Three key themes came to light during the collaboration process that can be used to guide and elevate storytelling about Campbell River as we look towards the future. The themes capture what makes Campbell River unique and why potential travellers may be motivated to visit. They further deepen the way our Place DNA[®] should be represented in the way we deliver tourism experiences and promote our destination.

**“IF YOU WANT TO GO FAST, GO ALONE.
IF YOU WANT TO GO FAR, GO TOGETHER.”**

- African proverb

THEME ONE



TOWARDS A NATURAL HARMONY

As its name suggests, Campbell River as a community and society has long been linked to its natural environment.

As the original stewards of the lands and waters, local Indigenous communities have lived in harmony with the environment since time immemorial. Similarly to many locations in Canada, when European settlers arrived relationships to the environment shifted into resource extraction and economic gain for some. In Campbell River, this occurred first through fishing and then forestry.

Now, the forestry industry as it once existed is dwindling and fishing is under pressure. The full impact of the Covid-19 crisis is as of yet unknown. But the lives and economic needs of Campbell Riverites are still reliant on this natural connection. Today, the natural environment is a core driver for the tourism industry and powers hydro and aquaculture projects, and appeals to lifestyle entrepreneurs who can maintain professional careers from a small, connected city.

In tandem with the rapidly changing modern world, the future of Campbell River will shift again. Campbell River will become a place for where everyone who lives, works, and plays there will be responsible. It will be a place where there is a natural balance between what the people of Campbell River need and what is needed to protect the region's beloved lands and waters for those who call it home. No one person can do this alone, but it is a future that can be created together.

In this honouring of the past, reckoning with the present, and journeying into the future, there is a natural harmony.

THEME TWO



WHERE THE WILD AND LIFE COLLIDE

Arriving in Campbell River is like being dropped into the wild – a patch of wilderness with a city in the middle, or a city with a gigantic wilderness backyard.

Eagles soar above. Snow-capped mountains shine brilliantly when the clouds lift. Towering trees and vibrant green forests provide indescribable calm. The life cycle of salmon is on display. Waterfalls put on spectacular displays of the force of nature. The ocean teems with marine life and the air smells of saltwater.

Discovery Passage is frequented by boats and whales alike. No scene is ever the same, as the weather and tides change and swirl. One can quite literally gaze upon the water and watch the world go by.

Everything in Campbell River has the best of both worlds, and it's this rare collision of the beauty of the wild and modern life that makes this place so remarkable. While locals pinch themselves at the natural beauty of their home, these sights are especially astonishing for big-city dwellers and international visitors.

**“OUR ORCA POPULATION IS
PART OF OUR COMMUNITY.”**

- Workshop participant

THEME THREE



SLIGHTLY OUT OF THE COMFORT ZONE

The Campbell River experience is authentic. That word can be overused, but in Campbell River it is entirely accurate. What you see is what you get, and the locals embrace this mentality.

The people are real.
The environment is real.
The place is real.

**“WILD, REMOTE, EXHILARATING,
ACCESSIBLE, SAFELY OUT OF
COMFORT ZONE.”**

- Workshop group describing the outdoor experience in Campbell River.

People can kick back and enjoy the comforts of the city or challenge themselves to truly epic wilderness experiences. It's up to each person; it's a choose-your-own-adventure sort of place. There's no wrong way to do it. Campbell River is a place that invigorates people, brings them past the ordinary, and nudges them ever so slightly out of their comfort zone.

For many European visitors, driving through 200 kilometers of remote wilderness is the stuff of dreams. No gas stations for hours? No traffic jams? Endless trees and atmospheric skies? Noses will be pressed against car windows. Pictures will be taken. The experience will be felt and remembered long after people return home – particularly if they happen to see a bear!

For others, going a step further out of the ordinary may mean working up to a longer hike in Strathcona Park. It may not be the steepest and longest, but it's something different than they've ever done, and it's worth every minute. Whatever ways people choose to step outside of their comfort zone in Campbell River, there are always more adventures, sights, and experiences waiting in the wings.

TARGET MARKETS

MITIGATION PHASE (2021/2022)

PRIMARY:

- Vancouver Island and BC (drive market)
- Visiting friends and family

SECONDARY:

- AB, (WA) (short haul)
- Winter long-stay RV/drive market

PSYCHOGRAPHIC:

- **PRIZM type**
 - Boomer Bliss
 - Suburban Sports
- **EQ type**
 - Rejuvenators
 - Gentle Explorers
 - Authentic Experiencers

WHATEVER WAYS PEOPLE CHOOSE TO STEP OUTSIDE OF THEIR COMFORT ZONE IN CAMPBELL RIVER, THERE ARE ALWAYS MORE ADVENTURES, SIGHTS, AND EXPERIENCES WAITING IN THE WINGS.

RESTART (2022-2023) AND REIMAGINE (2024-2027) PHASES:

PRIMARY:

- BC, AB, WA (drive market)

SECONDARY:

- AB and Toronto (domestic flight)
- Western Europe

PSYCHOGRAPHIC:

- **PRIZM**
 - Scenic Retirement
 - Country & Western
 - Boomer Bliss
- **EQ type**
 - Rejuvenators
 - Gentle Explorers
 - No Hassle Travellers

INTEREST/PASSION-BASED:

- **Year-round**
 - Nature-focused travellers
- **Off-season market segments**
 - Fishing 2.0 (new generation of anglers)
 - Scuba diving
 - Niche market segments (to be identified)

FIVE-YEAR STRATEGIC PRIORITIES

STRATEGY: DELIVER HIGH QUALITY DESTINATION EXPERIENCES

In keeping with the vision and values previously stated in this document, a key objective over the next five years is to mature the Campbell River tourism economy in close alignment with eco-minded travellers. The following points can guide action towards achieving alignment with this objective.

Key Action 1. Deliver experiences based on the principle of interconnectedness

Campbell River is a place where the connections between people, the environment, and the economy are short and visible. These connections have always been there and continue to change over time. Here, visitors have a unique opportunity to see and feel these connections.

Whether it's showing visitors the connections between humans and nature in Campbell River fishing traditions, educating people to 'leave no trace' when they venture out on a hike or attend a beach fire, or marvelling at the circle of life with annual salmon spawning, experiences should showcase how, as one workshop participant wrote, "everything is connected to everything else."

This includes Campbell River residents as well. A destination is also a place where people live. The connection between tourism and daily life should add value to both. Only then can tourism create successful long-term value holistically.

The principle of interconnectedness is already present in Campbell River, but the connections between the city's brand, individual businesses, residents, and the touch points that every visitor encounters need to be strengthened through the experiences we offer.

Key Action 2. Establish a Friendship Agreement with local Indigenous nations to ensure that tourism objectives include, value, and benefit Indigenous communities in Campbell River

Indigenous culture is very present in Campbell River, and is often a draw for visitors to the region. There are Indigenous wildlife guides, world-renowned art and carvings, annual cultural events, and informative museum displays. Over 70% of people surveyed by Destination Think agreed that "Campbell River's Indigenous tourism opportunities are underdeveloped and need to be prioritized (in partnership with Indigenous communities)."

Connecting visitors to local Indigenous, living culture is a big opportunity. But it is crucial that the Campbell River tourism industry establishes how to best work together with local Indigenous communities to understand and support Indigenous tourism objectives in Campbell River. This must be grounded in community values and communication to set the scene for an enduring, collaborative relationship.

70%+

OF PEOPLE SURVEYED BY DESTINATION THINK AGREED THAT "CAMPBELL RIVER'S INDIGENOUS TOURISM OPPORTUNITIES ARE UNDERDEVELOPED AND NEED TO BE PRIORITIZED (in partnership with Indigenous communities).

Steps towards this plan include:

- Strengthening relationships with local Indigenous communities with respect and celebration for cultural differences. Consider long-term working relationships that prioritize communication, visibility, and accountability. To date, Chief Chris Robert has asked Destination Campbell River to work directly with the We Wai Kum owned businesses such as: Thunderbird RV Park, We Wai Kum House of Treasures, Discovery Harbour Marina, and the boat launch.
- Nurturing existing relationships with Indigenous Tourism BC⁶ and the Indigenous Tourism Association of Canada⁷ to align with the burgeoning Indigenous tourism industry's resources, plans, and infrastructure.
- Drawing upon industry-specific examples such as The Musqueam Indian Band - YVR Airport Sustainability & Friendship Agreement or the Thompson Okanagan Tourism Association Seven Affirmations for Seven Generations Pledge as case studies to model.
- Supporting any initiatives resulting from this agreement.

Key Action 3. Reduce, offset, and drawdown CO2 emissions while eliminating waste and other environmentally harmful business practices

Destinations must practice what they preach with environmental and sustainability values to build trust with locals and visitors, as well as build their reputation. Consumers and visitors are increasingly mindful of the environmental impact and seek to spend their money in businesses and places that are transparent in their support for environmental causes. The alignment with existing community values and an ambition to become

industry leaders in Campbell River is encouraging, but it will be important to set specific and measurable goals to demonstrate these values in action and deliver experiences that are true to our Place DNA[®].

- The first step is to evaluate the existing performance of key goals and establish benchmarks. We must know where we are and where we want to go to meaningfully measure and communicate our progress to one another as an industry, and in turn to the outside world as a demonstration of our commitment to change.
- During this process, it will be helpful to remember that we are not alone on this journey. Many businesses, brands, organizations, and tourism destinations are in the process of assessing their environmental impact. We can look outwards for blueprints, case studies, and insights. Additionally, we can draw upon local innovation for inspiration (for example, Campbell River Whale Watching's partnership with Wilderness International).

“ECONOMICALLY, THE SUSTAINABLE APPROACH CAN BE PROFITABLE AS WELL. A 2016 STUDY BY SUSTAINABLE TRAVEL INTERNATIONAL AND MANDALA RESEARCH REVEALED THAT ECO-TOURISTS TEND TO STAY LONGER, SPEND MORE, AND BELIEVE THEY HAVE A RESPONSIBILITY TO RESPECT THE DESTINATION.”

Eco-friendly tourism is becoming a movement, and more vacationers are buying into the concept, CNBC, 2018¹⁰

⁶ <https://www.indigenoustravel.com/>

⁷ <https://indigenoustravel.com/corporate/>

⁸ <https://www.yvr.ca/en/media/news-releases/2017/musqueam-indian-band-and-vancouver-international-airport-sign-momentous-agreement-for-shared-benefit>

⁹ <https://www.thompsonokanagan.com/pledge>

¹⁰ <https://www.cnn.com/2018/04/27/eco-friendly-tourism-is-becoming-a-movement-and-more-vacationers-are-buying-into-the-concept.html>

Key Action 4. Build an annual capacity and demand plan and develop experiences to fill seasonal gaps

While some tourism products are available year-round, others are seasonal or one-off events. Each product drives demand. It is important that the tourism industry in Campbell River understands the opportunities for demand in order to identify where products and experiences need to be further developed, and focus on promotional activities.

- **Short-term (when allowed in context of COVID-19):** festivals, meetings, events, and sports tournaments can increase awareness and demand.
- **Long-term:** permanent experiences can build the destination's reputation and diversify the product mix.

Sixty-five percent of people who participated in Destination Think's stakeholder survey thought 'building the off-season' was important.

65%

OF PEOPLE WHO PARTICIPATED IN DESTINATION THINK'S STAKEHOLDER SURVEY THOUGHT 'BUILDING THE OFF-SEASON' WAS IMPORTANT.

Key Action 5. Grow and mature experiences and supporting services

As Campbell River matures beyond its core experiences to become a year-round destination, the management of tourism in the region will help differentiate the destination. Together, we'll need to make sure that everything needed for a holistic tourism experience matures as well. This can include everything from increasing high-quality entertainment options to lengthening restaurant opening hours.

Destination Campbell River will conduct visitor research and work closely with the tourism industry and other stakeholders to identify gaps in high-priority experiences, understand the common pain points that operators hear from their guests, and fill gaps in supporting services.

Over 70% of Campbell River stakeholders surveyed by Destination Think agreed that 'limited hours of operation by some small businesses do not align with visitor needs.' Seventy percent also agreed that 'Campbell River needs to improve the aesthetics of the city in order to stay competitive.'

70%+

OF CAMPBELL RIVER STAKEHOLDERS SURVEYED BY DESTINATION THINK AGREED THAT 'LIMITED HOURS OF OPERATION BY SOME SMALL BUSINESSES DO NOT ALIGN WITH VISITOR NEEDS.' SEVENTY PERCENT ALSO AGREED THAT 'CAMPBELL RIVER NEEDS TO IMPROVE THE AESTHETICS OF THE CITY IN ORDER TO STAY COMPETITIVE.'

STRATEGY: STRENGTHEN CAMPBELL RIVER'S REPUTATION AS A YEAR-ROUND TOURISM DESTINATION

Campbell River has a strong reputation and place name recognition for fishing. It has a good reputation for wildlife viewing and wilderness experiences, but these tend to be subsumed by a larger association with Vancouver Island. It is now time to build a year-round reputation as a mature, eco-centred tourism destination that celebrates the unique character of Campbell River. To do this, the tourism industry in Campbell River will do the following:



KEY ACTION: Align all Campbell River story tellers

A destination brand is the sum of all the stories it generates. The more aligned the industry and city are in their operators, guided by the destination brand, the stronger the collective voice of tourism in Campbell River will be.

Destination Campbell River will continue to motivate, encourage, curate and amplify the stories of all storytellers including:

- Our own stories, told in our owned, earned and paid media channels (website, social channels, printed guides, advertising, etc.)
- Our residents stories, through their social channels
- Our local tourism businesses
- Our local brand advocates, such as the city, artists and other influencers
- Our broader tourism network, such as Tourism Vancouver Island, Destination British Columbia and Destination Canada
- The tourism industry at large, such as tour operators, event organizers, and travel trade networks
- Travel media and online influencers
- Traditional media
- Event organizers, TV and the film industry
- Non-traditional partnerships as a result of our environmental initiatives
- B.C. Parks, museums, aquariums, attractions, event and performance venues, suppliers and producers
- And of course our visitors, who's voice will always speak the loudest

KEY ACTION: Ensure Campbell River maintains and protects core summer business

A focus on growing off-season visitation cannot come at the expense of summer business. We will continue to support summer experiences through our owned and earned media channels, and partnerships with trade and media. Destination Campbell River will deprioritize paid channels for the summer season and instead focus on delivering a high-quality experience that leads to word-of-mouth recommendations instead.

Should anything change that poses a risk to the summer season, such as the economic climate or a change in USD currency rates, or the aftermath of the COVID-19 crisis, necessary adjustments will be made to protect Campbell River's bread-and-butter business and adjust growth rates for the off-season. One way to do this would be by directing paid media efforts into summer initiatives.

KEY ACTION: Stimulate a four-season reputation through niche promotions

When the summer season is protected, we can direct our efforts to those times of the year where visitation is low. Campbell River has unique off-season experiences such as bear watching. We also have niche opportunities such as cold water diving that could generate additional revenue while building our reputation as a well-rounded tourism destination.

As we work collaboratively to develop these experiences that build the year-round tourism economy, we will prioritize these experiences in our promotional efforts in order to build the destination's overall reputation. We will do this by reviewing niche opportunities, gaining deep insights into these *passionate communities*, and ensuring our promotions align with their wants and needs.

KEY ACTION: Ensure Campbell River is part of long-haul visitor itineraries, especially in Western Europe

The Campbell River experience already aligns with the psychographic profile of visitors who travel around B.C. looking for a quintessential west coast city by nature experience. These people seek to explore and connect with B.C.'s natural beauty. Campbell River's brand aligns perfectly with long-haul travellers, especially from Western Europe, who want to experience B.C. in a real place, not in a "made for tourists" town.

Destination Campbell River has limited financial resources to support international awareness initiatives outside of travel trade and media support. They will work with their tourism partners to leverage and bolster existing efforts while finding new partnerships and activating visitor word-of-mouth, combined with some guerilla tactics to get the message out in a low-cost way.



MISSION: THE ROLE OF DESTINATION CAMPBELL RIVER

Destination Campbell River will continue to run an efficient and effective Destination Marketing Organization using Destination Think's modern destination marketing approach. Destination marketing is a collaborative effort. Depending on the overarching strategy, current priorities, and tactics, the DMO will use judgement to distribute its resources.

DMO ROLE	ACTIVITIES	EXAMPLES
DMO leads and funds	Activities of strategic priorities that align with the role of the DMO.	Fall promotion campaign
DMO leads but doesn't fund	Activities that require skill sets the DMO possess but might not align with the role of the DMO, fall outside MRDT rules, or require funds the DMO doesn't possess.	Promotion of a one-time large scale event
DMO initiates	Activities of strategic priority that fall outside the role or jurisdiction of the DMO.	Wayfinding and signage
DMO supports	Activities that are strategically important or relevant to the tourism industry.	Modern Entrepreneur series
DMO participates	Activities important enough for the DMOs voice to be heard as a representative for the tourism industry.	Certain city planning activities

As such, Destination Campbell River will lead some initiatives, take a supporting role in others, and participate where needed. It will always be responsible for working towards an aligned and successful industry by:

- using industry-leading destination marketing and social media tactics; and
- expanding its relationship network (and funding) beyond tourism through non-traditional partnerships. In order to make as big an impact as possible, we want to make sure that we don't leave any money or support from potential partners off the table. This is particularly important when it comes to non-traditional partnerships. Campbell River's environmental and stewardship ambitions may allow the community to leverage new opportunities, such as government grants or exciting entrepreneurial avenues.

FIRST STEPS

This document is not a project plan for the next five years. It contains the strategies that will guide us through a future that will undoubtedly consist of many twists and turns. The Covid-19 crisis that came in the final stages of the development of this document is an unfortunate example.

Destination marketing is a collective effort. That's why this strategy wasn't created by Destination Campbell River, but by many industry stakeholders. This strategy intentionally leaves a lot of room for our collective imagination because we will again need everyone to execute it.

This will start with the development of specific industry advisory groups to provide input and insights into bringing the strategy to life. For everyone, and by everyone.

MANAGEMENT, GOVERNANCE, AND ADMINISTRATION

The management of activities and funds are delegated to Destination Think (conducting this business as Destination Campbell River).

Governance is conducted through a Tourism Advisory Committee that makes recommendations to Campbell River City Council. The Tourism Advisory Committee meets quarterly to review progress against the plan.

The City of Campbell River is the Eligible Entity of the MRDT, and appoints the Tourism Advisory Committee through an annual application process. Destination Think submits plans and budgets to the City of Campbell River. TAC votes to recommend budgets and plans or otherwise. The City reviews plans and budgets (including the recommendation from TAC) and approves.

SOURCES OF FUNDING

MRDT is incremental to existing sources of funding. The funds from MRDT do not replace existing sources of tourism funding in the community.

Other available sources of funding include:

- The City of Campbell River base funding – \$250,000 annually
- Destination BC Cooperative Marketing Partnership Program open-pool funds – \$50,000-\$65,000 annually
- Government of Canada Summer Youth Jobs grant up to \$8,000 annually, by application
- Retail sales from merchandise – \$5,000-\$20,000k annually
- Registered Stakeholder Program investments est. \$10,000+
- Regional District Community partnership investments (*Municipalities and Rural Areas in the Strathcona Regional District*) ~\$3,000
- Applicable COVID-recovery and business development grants, destination development grants – varies

THIS IS AN INCREDIBLY EXCITING TIME FOR CAMPBELL RIVER

As this document shows, the Campbell River tourism industry demonstrates a great understanding of the factors affecting tourism in the region. It is clear that everyone is dedicated to increasing Campbell River's reputation, growing tourism in a responsible way, and delivering world-class experiences to visitors. It will take time to recover from the COVID-19 health crisis, but the foundations for a thriving visitor economy remain.

There are plenty of opportunities for ongoing collaboration to ensure that tourism benefits local businesses, the city's economy, and the quality of life for community members. The desire to become environmental leaders through stewardship is not a lofty goal. It shows the deep connections between people and the natural world in Campbell River, and takes a pragmatic look at the future with characteristic heart and grit.