

Metro Vancouver Tourism and Hospitality Industry Response and Recovery Task Force

Thank you Nancy and Ingrid for having me at the Metro Vancouver Task Force meeting today. I appreciate the opportunity to share an overview of our marketing performance and a quick look forward to the fall and winter ahead.

Before shifting into the campaign and performance data, I do also want to acknowledge that we know this is just the beginning of what will continue to be some difficult months ahead.

This week we saw more tough news for operators in our region, with the permanent closure of the Trump Hotel and the temporary public closure of the Vancouver Aquarium in this region. We know many of you are working tirelessly to keep your doors open, or to support and promote the businesses in your area, and we will continue to do everything we can to help every step of the way.

Road to Renewal - Marketing

2020 Phase 1 & 2	Phase 3	Phase 4
<p>Response Now to mid June</p> <p>Objectives: Provide information and inspiration to industry, BC residents, and future international travellers. Provide timely information, tools, and learning resources to inform industry decision making.</p> <p>Strategies:</p> <ul style="list-style-type: none"> 1. Protect tourism industry 2. Respond to industry needs 3. Inform with consumer and industry insights <p>Activities:</p> <ul style="list-style-type: none"> - Support public service messaging and support industry with messaging guidelines; - Provide inspiration for future travel (Explore BC Later, Explore BC Local) - Pause marketing, except social, web, email - Support tourism businesses as possible Explore BC Local - Planning for Recovery (campaigns, Partners, CDMOs, Sectors, RDMOs, businesses); - Pre-planning for Resilience (iconics) 	<p>Recovery July to start of Phase 4 (TBD)</p> <p>Objectives: Generate revenue as quickly as possible for BC tourism industry. Support industry in adapting their marketing and product experience to the new visitor.</p> <p>Strategies:</p> <ul style="list-style-type: none"> 1. Restore tourism's social license (in host communities) 2. Rebuild consumer confidence in travel 3. Re-ignite BC's tourism industry revenue 4. Propel BC tourism businesses and destinations forward through shared capabilities <p>Activities:</p> <ul style="list-style-type: none"> - Major Recovery Campaign for domestic (BC, AB, ON) - Focus on key travel motivators, sellable products; - Collaboration with key marketing partners to maximize impact, reach and 'infall' opportunities (e.g. CDMOs, Sectors, RDMOs, BC Ferries, parks, hotels, DC, AB) - Expand shared content, shared data, shared systems as a mechanism to support recovery; - Pre-planning and consultation for Resilience (iconics) - Initiate international programs for winter 20/21, summer 21 - Pre-planning and consultation for Tourism Economic Recovery Strategy (eg iconics) 	<p>Renewal TBD depending on recovery</p> <p>Objectives: Build a lasting, resilient industry with iconics. Strengthen BC industry competitiveness with continued focus on product development and digital capabilities.</p> <p>Strategies:</p> <ul style="list-style-type: none"> 1. Restore traveler confidence in US & Overseas 2. Magnify BC's tourism industry revenues opportunities 3. Secure BC's global competitive advantage through iconic experiences <p>Activities:</p> <ul style="list-style-type: none"> - International marketing for 2021 travel; - In collaboration with partners province wide, build out BC's iconic journeys and places to create global competitive advantage for BC's long term marketing (place branding) and destination product strength (place making) - Expand shared content, shared data, shared systems through industry's Shared Service Data Hub

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For those of you who have attended our biweekly industry calls, you will know our COVID response framework of Response – Recovery – Renewal. We are in the Recovery phase now and focusing on supporting revenue generation among tourism businesses now. We will be in this phase until the borders open and we can once again welcome our international guests.

We know that BC residents will not make up the loss of our US and overseas guests. International visitors make up 26% of visits but over 51% of revenue and they are vital to the success of many tourism businesses – contributing \$12.2B in 2019.

In the absence of international travellers, we have all worked diligently to inspire BC residents to get out and explore their province.

Explore BC – Summer



We have done this through featuring experience collections around BC in the Explore BC campaign.

These came to life through a very broad spectrum of materials – to inspire (via TV, print ads, digital media), to reassure safe travel, and to drive immediate bookings (blog posts, and in particular in July and August, focussed significant funds on featuring bookable experiences and generating leads to businesses.

Explore BC – Summer



5 Languages



\$6M Funding for 9 cities in BC



11.4M Content Engagements



\$750K Value Add



300+ Print Insertions

49+ Communities



REDISCOVER BC THIS SUMMER
RANCHES, RIVERS & RANGES

304M Impressions

Since early July, we have attained 304M impressions, generating 11.4M content engagements, and 300+ insertions in community papers throughout 49 communities in BC, for 40+ partners, we got over \$750K in value add through various media, and our materials appeared in 5 languages in 15 multi-lingual publications including English, Farsi, Punjabi, Filipino.

Explore BC – Supporting Urban



Destination British Columbia
Sponsored

Discover why these 6 getaways are a perfect place to celebrate a special occasion, or yourself.



HELLOBC.COM
Summer getaways
Vancouver hotel experiences

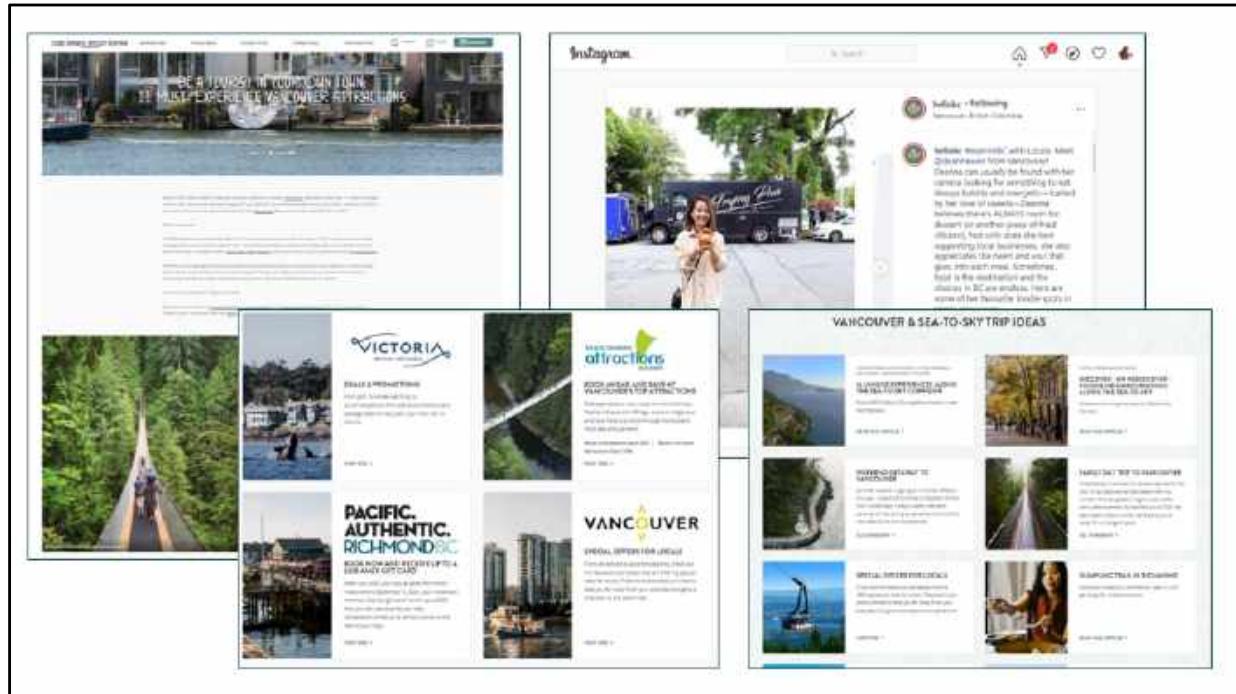
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When we saw that our urban centres including Vancouver, Richmond, Victoria were not seeing the occupancy and growth rates that other areas in BC saw, we pivoted quickly in July, investing over \$100K on top of already planned activities.

We integrated and amplified articles and videos that Vancouver, Richmond and Victoria had created including on our website, in social and through content partnerships.

Created new content such as articles and emails on how to “Be a Tourist in Vancouver” and created 15s videos on deals and places to stay.



We're featuring Ways to Save deals on our websites and driving traffic to this page including the Vancouver Attractions group, and running influencer trips.

INFLUENCER TRIPS WITH EVO, AND THE BC LIONS



And we have a partnership with BCAA (Evo) and with the BC Lions who are travelling in Vancouver and Victoria.

These trips are featuring the Fairmont, Capilano Suspension Bridge, Talaysay Tours, Sandbar Restaurant, Aquabus, Granville Island, Italian Kitchen, ARC Restaurant and Harbour Air and more in Victoria.

And the list goes on.

Marketing Performance

Result	Performance (July to August 30)		
More people see BC travel content	 <p>IMPRESSIONS</p> <p>304M</p>	 <p>COST PER IMPRESSION (CPM)</p> <p>\$6.15</p>	Impressions: Exceeding CPM: On track
We're providing the right content at the right time in the right place	 <p>CONTENT ENGAGEMENTS</p> <p>12M</p>	 <p>CONTENT ENGAGEMENT RATE</p> <p>5.6%</p>	Engagements: On track Engagement rate: Exceeding
BC Industry benefits from our work	 <p>TOTAL REFERRALS</p> <p>2M</p>	 <p>COST PER REFERRAL (CPA)</p> <p>\$0.57</p>	Referrals: Exceeding Cost/Referral: Exceeding

Generally, we're confident with the performance of the campaign to date. We're monitoring our Performance Indicators daily/weekly.

Industry Performance

Destination	Aug 16-22 Occupancy Rate	Week over Week August 16-22, 2020 vs. August 9-15, 2020 Occupancy Point Change	Year over Year August 16-22, 2020 vs. August 18-24, 2019 Occupancy Point Change
British Columbia	53.7%	+1.6	-38.9
Kamloops	63.3%	+2.5	-31.1
Kelowna	82.6%	+1.5	-7.1
Richmond	43.2%	+1.0	-54.3
Whistler	59.4%	+0.5	-31.9
Vancouver (City of)	31.4%	+2.7	-66.9
Victoria	50.6%	+4.9	-43.7



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According to STR, an agency which captures BC hotel performance, we're seeing a continued, steady rise in BC hotel occupancy week after week.

On average, BC's hotel occupancy for the week of August 16-22 was 53.7%. This represents a positive increase of 1.6 points from the previous week and a decrease of -38.9 compared to the previous year (August 18-24 2019).

The occupancy rate of urban centres have increased this week, however, rates remain below 2019 levels, albeit to varying degrees.

We know Vancouver relies heavily on US and international travellers and obviously that is where the shortfall is taking place.

From Environics Mobility data (tracking cell phone locations), in July, we're seeing traffic of British Columbians travelling in BC is down about 20% in AB, in BC down about 30%, and ON down about 70% – and stress the word “about”!

VCM in July was down about 24% for BC and AB about 29% (and 70% for ON) – so a little bit more than BC as a whole, but not that much. So there is a little avoidance of VCM but not a lot. We'll be sharing more performance data on the Industry Call tomorrow.

Explore BC – Fall/Winter/Ski



Objectives:

- Motivate travellers to book weekend getaways for urban exploration
- Promote experiences, weekend getaways & extended trips
- Inspire users to travel again (reassure/responsible travel)

Objectives:

- Motivate travellers to book weekend getaways for urban exploration.
- Increase awareness of winter activities in the Vancouver & Sea-to-Sky and West Coast Culture experiences collections.

Objectives:

- Build consumer confidence in taking a ski vacation
- Long Haul: Encouraging families to book a BC ski trip in Winter/Spring 2021

Even greater focus on generating leads/bookings via bookable experiences

And as a look ahead to fall/winter and ski, we are working passionately on new materials to get BC residents out locally and throughout the province. We know that September is a great time for couples to travel while families will be adjusting to back to school. We'll have an even greater focus on bookable experiences – featuring golf courses, restaurants, hotels, communities – to an even greater extent and are working closely with our key cities and resorts to maximize revenue while encouraging safe and responsible travel.