

SOUTH CENTRAL ISLAND

DESTINATION DEVELOPMENT STRATEGY



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BRITISH COLUMBIA™

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EXECUTIVE SUMMARY

A. DISTINCTIVE DESTINATION

The South Central Island planning area encompasses an exceptionally diverse range of landscapes and ecosystems; from rainforests, meadows, mountains and marshes, to beaches, rivers, lakes, and oceans. Spanning from the west coast of Vancouver Island to the inside passage, the planning area is comprised of three regional districts: Alberni-Clayoquot, Nanaimo and Cowichan, and the Southern Gulf Islands, and 24 First Nations.

The South Central Island is accessible by ferry, airplane, floatplane, and motorcoach.

Home to approximately 275,000 residents, the South Central Island has historically relied on its mining, forestry, and fishing industries, supported by its rich endowment of natural resources. As natural-resource industries have suffered from boom or bust economic cycles, new industries and businesses

have been attracted to the planning area, shifting the economy to a service-based model.

Tourism to the South Central Island accounts for approximately 7% of the area's economic base, with most visitor and industry metrics trending upwards in 2015 and 2016. BC residents account for the majority of visitations, with other key markets including US residents, other Canadians, and overseas visitors.

B. DISTINCTIVE DIRECTION

The motivating experiences that might serve as demand generators include:

- Nature-based adventures
- Indigenous tourism experiences
- The area's rich history of settlement and industry
- The coastal creativity of the arts, crafts and cultural sectors
- The welcoming, relaxed, and safe island-coastal lifestyle
- The marine playground afforded by the wealth of rivers, lakes, oceans, and islands in the planning area

The vision for the South Central Island is aligned with existing community plans and planning frameworks, and tied to the aspirations of tourism partners as to the type of destination they would like it to be in 10 years:

Every visitor will be inspired by our diverse range of remarkable West Coast experiences that highlight the rich cultural heritage of island life and the mystical elements of nature where land and ocean meet.

We will work as an inclusive and well-connected tourism “community” that is highly respected for its contribution to local “quality of life”, our collaborative efforts to ensure the sustainability of the destination and the visitor economy, and the warmth of our welcome.

Three destination development goals have been identified:

1. A go-to destination for EQ targets built on an exceptional combination of natural, built, and cultural experiences.
2. Widespread use of sustainability principles by local government, operators, and community partners.
3. A dynamic planning environment that embraces change through productive partnerships, strategic infrastructure priorities, and effective management practices.

Destination development in the South Central Island will be guided by the following principles:

- Supports and enhances existing community values and aspirations
- Builds on core attributes that make the destination distinctive
- Recognises the concept of sustainability as the underlying core value
- Aligns with provincial strategic priorities that relate to tourism
- Promotes collaboration and inclusivity as the basis of making progress
- Celebrates and respects the role of First Nations

Six themes, containing 18 development objectives, are described within this strategy, along with the priority actions within each objective and the success networks needed to realize implementation.

THEME 1: PLANNING AND COLLABORATION

- A new framework for regional collaboration in the planning and development of tourism
- Strengthened representation of tourism interests within existing statutory planning processes
- Sustainable tourism development

THEME 2: TOURISM INFRASTRUCTURE

- A productive process for identifying and prioritizing tourism infrastructure
- Quality land, air, and water-side transportation and community tourism infrastructure
- Public tourism infrastructure that leverages private sector tourism investments

THEME 3: INTEGRATED MULTI-USE TRAIL SYSTEM

- Coordinated, inter-regional and community trail planning
- Consistent trail standards and branding
- Development of at least one new iconic trail

THEME 4: TECHNOLOGY INNOVATION

- Expanded capacity for connectivity
- A greater integration of technology into the visitor experience
- Increased uptake of technology best practices by tourism partners

THEME 5: HUMAN RESOURCES

- Enhanced labour supply
- Increased uptake of education, training, and accreditation programs
- Retention of existing businesses through succession planning

THEME 6: PRODUCT DEVELOPMENT

- Expanded year-round, market-ready tourism products and services
- Informed, competitive, and innovative tourism operators
- Sustainable experiences integrated into local communities and culture

ACRONYMS

AEST Ministry of Advanced Education, Skills and Training

AGRI Ministry of Agriculture

ITAC Indigenous Tourism Association of Canada

DMO Destination Marketing Organization

DBC Destination British Columbia

DC Destination Canada

DDS Destination Development Strategy

FLNR Ministry of Forests, Lands, Natural Resource Operations and Rural Development

GO2HR The British Columbia Human Resource Organization for Tourism

ITBC Indigenous Tourism Association of British Columbia

JTT Ministry of Jobs, Trade and Technology

IRR Ministry of Indigenous Relations and Reconciliation

LBR Ministry of Labour

MRDT Municipal Regional District Tax (commonly referred to as the “Hotel Tax”)

OCP Official Community Plan

RDMO Regional Destination Management Organization

RV Recreation Vehicle

SA Situation Analysis

SCI South Central Island

SGI Southern Gulf Islands

TAC Ministry of Tourism, Arts and Culture

TIABC Tourism Industry Association of British Columbia

TRAN Ministry of Transportation and Infrastructure

TVI Tourism Vancouver Island

UNESCO United Nations Educational, Scientific and Cultural Organization

VC Visitor Centre

WD Western Diversification

WTA Wilderness Tourism Association

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FOREWORD AND ACKNOWLEDGEMENTS

FOREWORD This Destination Development Strategy is the final report resulting from a one-year, iterative process of gathering, synthesizing, and validating information with stakeholders about the current status and future direction of tourism in the South Central Island tourism area of British Columbia.

As one of 20 destination development strategies produced between 2016 and 2019, this strategy will contribute to the tapestry of long-term regional and provincial planning that supports the

development of British Columbia as a world-class tourism destination offering remarkable, authentic experiences that exceed expectations and align with the provincial brand.

ACKNOWLEDGEMENTS

Destination British Columbia, Tourism Vancouver Island (TVI), and the project facilitation team thank the stakeholders who contributed throughout the process by:

- attending community meetings
- participating in surveys, stakeholder interviews, and follow-up conversations
- forwarding relevant documents that provided the background information for the situation analysis.

The development of the South Central Island Destination Development Strategy includes input from over 261 tourism partners, representing the diversity of communities, organizations, businesses, interests, and passions. The participation of our partners throughout the process was invaluable. However, it is important to note that no endorsement of this strategy or any action listed within was obtained.

We thank the First Nations on whose traditional territories we gathered for our community meetings including: Tofino and Ucluelet — home of the Nuu-chah-nulth, Nanaimo, Saanich, and the Southern Gulf Islands — home of the Coast Salish.

We acknowledge that many significant agreements have been realized in this planning area resulting from successful cooperation between the First Nations and non-indigenous people, the private sector, government, non-for-profit organizations, and passionate volunteers.

Special thanks are offered to members of the working group:

- Pat Deakin, City of Port Alberni
- Joleen Dick, Hupacasath First Nation

- Keith Wyton, Alberni Clayoquot Regional District
- Denise Stys-Norman, Tourism Ucluelet
- Rebecca Herwitz, Clayoquot Sound Biosphere Trust
- Cheryl McLay, Ministry of Forests, Lands, Natural Resource Operations and Rural Development
- Blain Sepos, Parksville Qualicum Beach Tourism Association
- David Mailloux, Nanaimo Port Authority
- Tom Duncan, City of Duncan
- Kristy Grant, Duncan Visitor Centre
- Ed Andrusiak, Experience the Gulf Islands
- Janet Clouston, Salt Spring Island Chamber of Commerce
- Darryl Martin, Salt Spring Island Community Economic Development Commission
- Rod Smith, Ladysmith Maritime Society
- Jill Hatfield, Ministry of Agriculture
- Teresa Ryder, Indigenous Tourism BC
- Paul Drummond, Tigh-Na-Mara Seaside Spa Resort
- Leif Bogwald, Vancouver Island Expeditions

Special thanks are offered to the facilitators of the South Central Island destination development process:

- Jennifer Houillebecq, Tourism Planning Group
- Steve Nicol, Lions Gate Consulting

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INTRODUCING THE STRATEGY

FLORENCIA BAY
Photo: Mike Seehagel

The South Central Island Destination Development Strategy is designed to enhance the competitiveness of the planning area over the next 10 years and beyond. The plan was developed as part of Destination BC's Destination Development Program.

The program is a critical part of Destination BC's corporate strategy and facilitates the collaboration of local, regional and provincial agencies, First Nations, destination marketing

organizations (DMOs), tourism operators, and other community interests to guide the long-term growth of tourism in the planning area.

A. PROGRAM VISION AND GOALS

The provincial vision for the Destination Development Program is as follows:

- BC is a world-class tourism destination that offers remarkable products and experiences that are authentic, driven by visitor demand, exceed expectations, and align with BC's brand

The above vision is supported by three provincial goals:

- Make BC the most highly recommended destination in North America
- Create strategic 10-year plans for tourism development and improve return-on-investment for

government and private sector investments in tourism assets

- Elevate BC's ability to compete as a premium destination while making the province more attractive for investment

Destination development brings together planning, policy, and capacity building efforts to:

- Ensure that a destination is well positioned to make future strategic decisions

- Address impediments to growth and capitalize on opportunities
- Outline key assets of a destination including the main product themes and experiences available
- Outline key priorities for new product, infrastructure, and amenity development
- Identify impediments to development and tourism growth (e.g., potential policy or capacity issues, available funding, access to funding, etc.)

B. PURPOSE OF THE STRATEGY

This strategy is intended to serve as a guide for tourism partners as they proceed with implementation. This document should be reviewed and updated as necessary to reflect changing tourism objectives, priorities, and market conditions.

Also, results should be tracked regularly to ensure learnings can help future implementation activities be even more effective in increasing economic, social, and cultural benefits to the entire area.

This strategy not only provides underlying support for the goals of the provincial Destination Development Program but also:

- Provides strategic direction for the region and guidance for local and regional planning
- Enhances the South Central Island's ability to leverage their resources and programs

- Fosters joint action and inter-community dialogue.

The South Central Island Destination Development Strategy is intended to serve as a guide for tourism partners as they proceed with implementation. This document should be reviewed and updated as necessary to reflect changing tourism objectives, priorities and market conditions.

FIGURE 1:
Tourism Revenue
Drivers



C. A FOCUS ON THE SUPPLY AND EXPERIENCE

Destination development is the mechanism whereby the natural life cycle of tourism (e.g., development, stagnation, decline, and rejuvenation) is managed to ensure a destination evolves to remain desirable for the ever-changing consumer and hence, competitive in its target markets.

Destination development happens when industry and government plan and work together to enhance the quality of the visitors' experiences by ensuring tourism products, services, amenities, and practices meet and exceed visitors' expectations over the long term.

Tourism has two primary revenue drivers — supply and demand. Creative marketing efforts strive to generate short-term demand for a destination and create immediate urgency for people to want to visit. Destination development focuses on the supply side of tourism by creating a compelling visitor experience to attract new visitors and entice repeat visitation. Arguably, in this age of near instantaneous sharing of experiences via social networks (e.g., Facebook, Twitter) and third-party platforms allowing the traveller to review their experience (e.g., TripAdvisor), the quality of the destination and the experiences it offers is now an essential element of the marketing toolbox.

There are multiple dimensions to supply that are considered in destination development planning to enhance the visitor experience:

- the setting in which our experiences take place and how to access them
- policies that establish and maintain opportunities and growth barriers
- the investment enhancement framework
- products and experiences matched to consumer interests, including infrastructure and amenities (which are all often public in nature and used by residents as well as visitors)
- visitor servicing programs that meets and exceeds guest
- capability, skills, and training our industry needs so that we all can excel at what we do

D. METHODOLOGY

The South Central Island Destination Development Strategy was developed based on extensive, collaborative effort during a one year planning process, followed by an extensive review process that culminated in the creation of a situation analysis report and this strategy.

The destination development planning approach was highly iterative, allowing for multiple opportunities for stakeholder input and validation. The process followed a semi-structured strategic approach, created by Destination BC that allowed for flexibility to ensure the distinct considerations of each

planning area were assessed and respected. A volunteer working group contributed their expertise to reviewing and discussing the key findings from the situation analysis, and helped develop the goals, supporting objectives and strategies contained in this strategy.

FIGURE 2:
Five Dimensions
of Supply — the
Visitor Experience



FIGURE 3:
Key Project
Timelines

ACTIVITY	DATES
Pre-project staging and document review; interviews	July–December 2016
Project Kick-off Meeting in two locations: <ul style="list-style-type: none"> • Tofino • Nanaimo 	July 21, 2016
First in-community consultation in three locations: <ul style="list-style-type: none"> • Tofino • Nanaimo • North Saanich (for Southern Gulf Islands) 	October 18–20, 2016
Second in-community consultation in three locations: <ul style="list-style-type: none"> • Gulf Islands (Mayne, Galiano, Salt Spring Island) • Nanaimo • Ucluelet 	December 6–8, 2016
Draft Situation Analysis	August–September 2016
Working group meeting in Nanaimo to draft the strategy and provide recommendations	January 23, 2017
Finalize the Situation Analysis and draft the Destination Development Strategy	February–March 2017
Destination Audit	April–May 2017
Destination Development Strategy Review Process	May–December 2017
Finalize South Central Island Destination Development Strategy	March 2018

The process involved a combination of facilitated, in-person consultations and planning workshops over a 10-month period beginning in July 2016. A total of 10 workshops involving 205 participants were held in Nanaimo, Tofino, Ucluelet, Sidney, Sturdies Bay, Bennet Bay, and Ganges. Key informant interviews were conducted with 18 stakeholders, while an online destination assessment survey was completed by 39 stakeholders.

A working group consisting of regional stakeholders was formed to assist, guide, and review the strategy development process and outputs. Members were identified by Tourism Vancouver Island (TVI) and Destination British Columbia (DBC), with input from facilitators.

E. PROJECT OUTPUTS

The three key outputs from this project include:

1. An asset inventory of accommodation, tourism businesses and attractions, tourism organizations, food and beverage establishments, parks and recreation sites, sports and arts facilities, meeting facilities, transportation, and visitor services.
2. A situation analysis report that provides foundational research related to the South Central Island, access and infrastructure, key tourism assets, key markets, a destination assessment, and priority planning area considerations to inform the development of the Destination Development Strategy.
3. This Destination Development Strategy.

ALIGNMENT

The South Central Island Destination Development Strategy is one of three that has been prepared for Vancouver Island, and one of 20 for the province as a whole.

Figure 4: Transportation Development Areas

The two other planning areas in the Vancouver Island Region are: North Island and Greater Victoria. Over the course of Destination BC's Destination Development Planning Program, each of the province's six tourism regions will integrate their planning area plans into a Regional Destination Development Strategy which, in turn, will be used to inform a Provincial Destination Development Strategy, together with all 20 planning areas strategies.

It is important to recognize that visitors do not make travel decisions based on artificial boundaries created by governments and organizations. As a result, planning areas span multiple jurisdictions thus reinforcing the importance of an integrated approach with a shared vision and prioritized investments.

The destination development strategies themselves will be influenced by, and where appropriate reflect and complement, other planning initiatives.

FIGURE 5:
Levels of Destination
Development Planning





4

SUCCESS NETWORKS

SALT SPRING ISLAND
Photo: Reuben Krabbe

Success networks represent the clusters of businesses and organizations (private sector, government, and not-for-profit) who are encouraged to collaborate and work in harmony to bring the opportunity to fruition.

Successful destination development implementation recognizes that we all have a role to play. The recommendations contained within this strategy form the foundation for additional focused and aligned discussions regarding implementation locally, regionally, and provincially. Organizations identified within each tactical success network will be in a position to review — locally, regionally, and provincially, the potential for growing tourism, by leading, or supporting implementation, and action. It does not imply the organizations have committed or endorsed the tactic. This strategy is intended to inform

conversations that may lead to future investments and actions, or that will contribute to growing this planning area's and the province's visitor economy.

It is important to note that the development opportunities are not mutually exclusive.

The complexity of the tourism opportunity is understood in the South Central Island planning area. Stakeholders demonstrated a desire to work together throughout the community consultations. It is only by working collaboratively that the true potential of the South Central Island can be realized.

This strategy is intended to inform actions for the future, which over time may be embedded in the local, regional, and provincial decision making. The result will be an integrated system of priorities that will achieve better development decisions, drive greater tourism revenues, and realize benefits for businesses and communities in the South Central Island. All this will contribute to a thriving, vibrant, and growing economy.

Joint strategy ownership among all planning area tourism partners is a critical component of this program's success. The planning process identifies a suggested success network of tourism partners to champion and move actions within each objective forward. However, during implementation, leads and involved parties would need to be verified. In many instances,

executing on an initiative may require sharing responsibilities and entities listed will be responsible to lead their own areas.

The regional representative in the Vancouver Island Region has an important role to play as a regional destination development champion. As this planning process is not intended to duplicate ongoing efforts or create new organizational or administrative structures, the implementation of this strategy should first be executed through existing organizations, where possible.

The following partners have been identified as likely playing a role in moving a potential objective or action forward:

FIGURE 6: Key Governmental and Management Organizations

FEDERAL	FIRST NATIONS	PROVINCIAL	REGIONAL	LOCAL
<ul style="list-style-type: none"> • Destination Canada • Indigenous Tourism Association of Canada • Western Economic Diversification • Parks Canada • Canadian Heritage • Public Works and Government Services Canada 	<ul style="list-style-type: none"> • Nuu-chah-nulth Tribal Council • Maa-nulth First Nations • Naut'sa mawt Tribal Council • Hul'qumi'num Tratey Group 	<ul style="list-style-type: none"> • Destination BC (DBC) • Indigenous Tourism BC • Ministries/Agencies: <ul style="list-style-type: none"> -Tourism, Arts & Culture -Indigenous Relations & Reconciliation -Transportation & Infrastructure -Forests, Lands & Natural Resource -Operations, incl. Rec Sites and Trails & Heritage -Environment -BC Parks -Agriculture -go2HR 	<ul style="list-style-type: none"> • Tourism Vancouver Island • Island Coastal Economic Trust • Vancouver Island Economic Alliance • Nuu-chah-nulth Economic Development Corporation • Community Futures of Alberni Clayoquot, Central Island and Cowichan • Vancouver Island University • Vancouver Island Spine Trail Association 	<ul style="list-style-type: none"> • Regional Districts of Alberni-Clayoquot, Nanaimo and Cowichan Valley • Municipalities of Ucluelet, Port Alberni, Tofino, Nanaimo, Parksville, Lantzville, Qualicum Beach, North Cowichan, Ladysmith, Duncan, Lake Cowichan • Community DMOs • Community COCs



5

A DISTINCTIVE DESTINATION

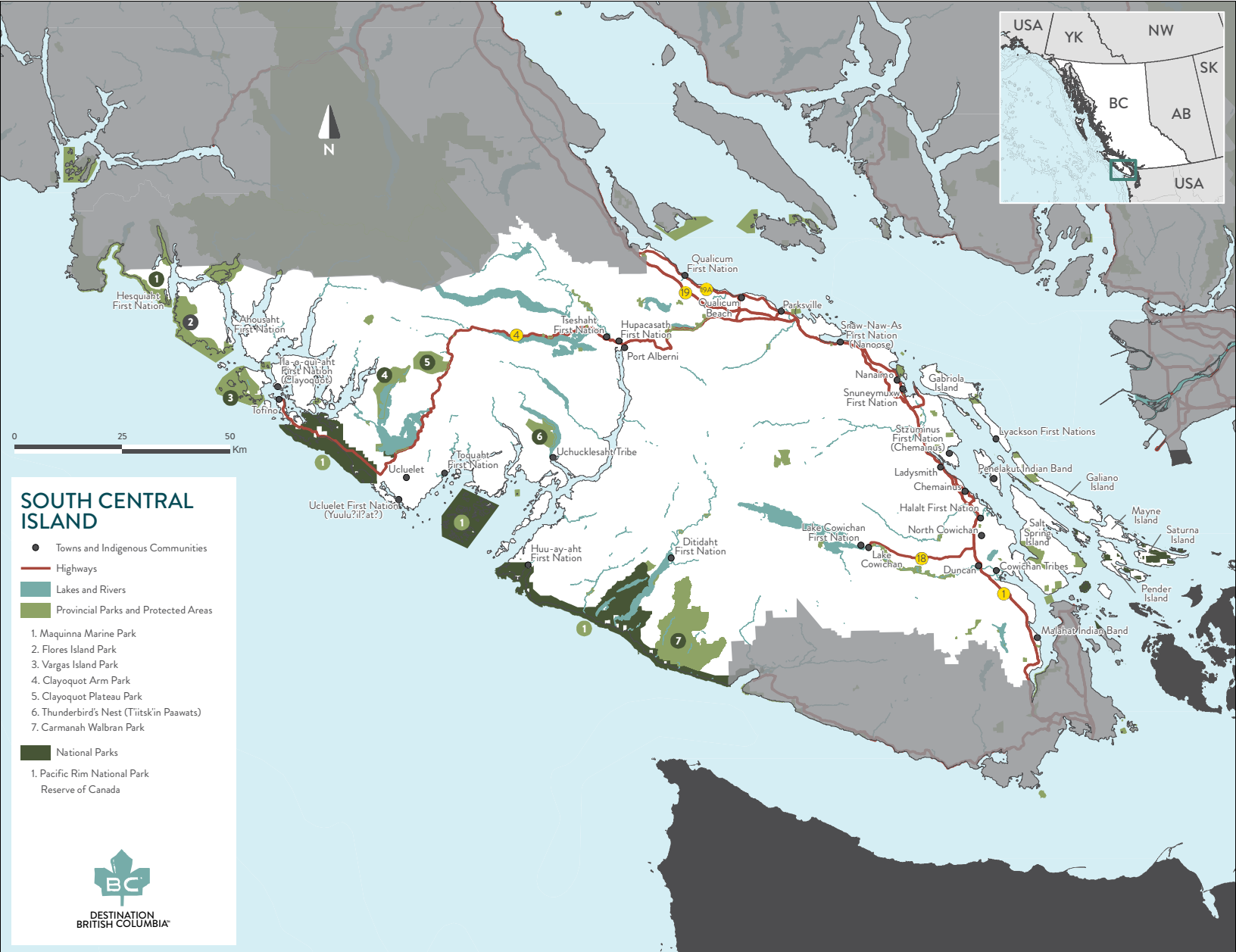
HORNE LAKE CAVES
Photo: Ben Giesbrecht

A. GEOGRAPHIC DESCRIPTION OF THE AREA

The total land area of the South Central Island is approximately 3.4 million hectares. The landscapes and ecosystems are diverse, with rainforests, marshes, meadows, beaches, mountains, oceans, rivers, lakes, and an abundance of terrestrial and marine wildlife spanning the west coast to the inside passage.

Each sub-region has its own set of key attractants. The Pacific Rim sub-region provides a mix of natural, built, and historical features of interest to visitors with iconic draws including the Pacific Rim National Park Reserve, Hot Springs Cove, the Clayoquot Sound/ UNESCO World Biosphere Reserve, McLean Mill National Historic Site, Barkley Sound, and Della Falls. The central sub-region has numerous natural and cultural attractions, including outstanding provincial and city parks (e.g., Carmanah Walbran, Rath Trevor Beach, Englishman River Falls),

Cowichan River and Lake, Horne Lake Caves, the iconic West Coast Trail, a cluster of distinct, small communities, and vibrant wineries and agritourism sector. The Southern Gulf Islands include hundreds of islands and islets that form an ecologically rich and diverse land and marine scape, including being home to the last remaining pockets of Garry oak ecosystems, and having a climate of Mediterranean characteristics. The Gulf Islands National Park Reserve, Salish Sea Marine Trail, and Tours des Iles are complemented by a unique Island lifestyle, and a vibrant arts community.



B. DESCRIPTION OF THE POPULATION BASE, COMMUNITIES INCLUDED, AND FIRST NATIONS

The South Central Island planning area includes the entirety of three regional districts, Alberni-Clayoquot, Nanaimo and Cowichan, as well as the Southern Gulf Islands, which form part of the Capital Regional District. The population is approximately 275,000, distributed among 11 municipalities and unincorporated areas. Recent population growth has been concentrated in the Nanaimo, Parksville, and Qualicum areas. The estimated 2011 population of First Nations in the planning area is 22,500.

BC residents account for 66% of total visitation and 41% of spending on Vancouver Island. Other major markets include US residents, other Canadians and overseas visitors¹. Canadians and BC residents prefer nature-based activities, while US and overseas visitors are more likely to seek out historical and cultural activities. Regional markets in BC, Alberta, and Washington State tend to have a very favourable overall impression of the region as a place to visit (the highest of any BC Tourism region). These markets also have a high likelihood of recommending Vancouver Island as a leisure destination.

¹Destination BC. Vancouver Island Regional Tourism Profile. January 2015.

C. DESCRIPTION OF ECONOMY BASE – HISTORICAL AND CURRENT

The history of Vancouver Island's economy has been strongly tied to its rich endowment of natural resources. The historical reliance on mining, forestry, and fishing has given way in recent decades to a service-based economy. Although resource industries remain important, they have suffered the effects of boom or bust economic cycles. Still, they represent a key segment of the economic base. Many new industries and businesses have been attracted to Vancouver Island and to the Nanaimo area in particular, due to quality of life features. Examples include high-technology firms, recreation, tourism, and small manufacturing.

Tourism in the South Central Island is distinctive, diverse, and growing, but at the same time it is facing a range of challenges. Visitor and industry metrics are relatively healthy, with almost all key indicators (ferry travel, highway travel, room revenues, occupancies, visitor centre, and parks attendances) trending upward in 2015, and again in 2016. The industry is well balanced geographically, and in terms of service offerings. Approximately 1,300 businesses are engaged in providing tourism services, with everything from accommodation and hospitality to guided outdoor recreation, major attractions, and a vibrant agritourism sector. Tourism accounts for approximately 7% of the region's economic base.

D. OVERVIEW OF TOURISM PERFORMANCE

ROOM REVENUES

The room revenue data presented does not represent all room revenues in the planning area, only those collecting and remitting the Municipal and Regional District Tax (MRDT). In addition, the

BC government stopped collecting room revenue data in 2010. Data for the South Central Vancouver Island planning area up until that time is presented in Figure 7.

FIGURE 7:
Room Revenue
2000–2010

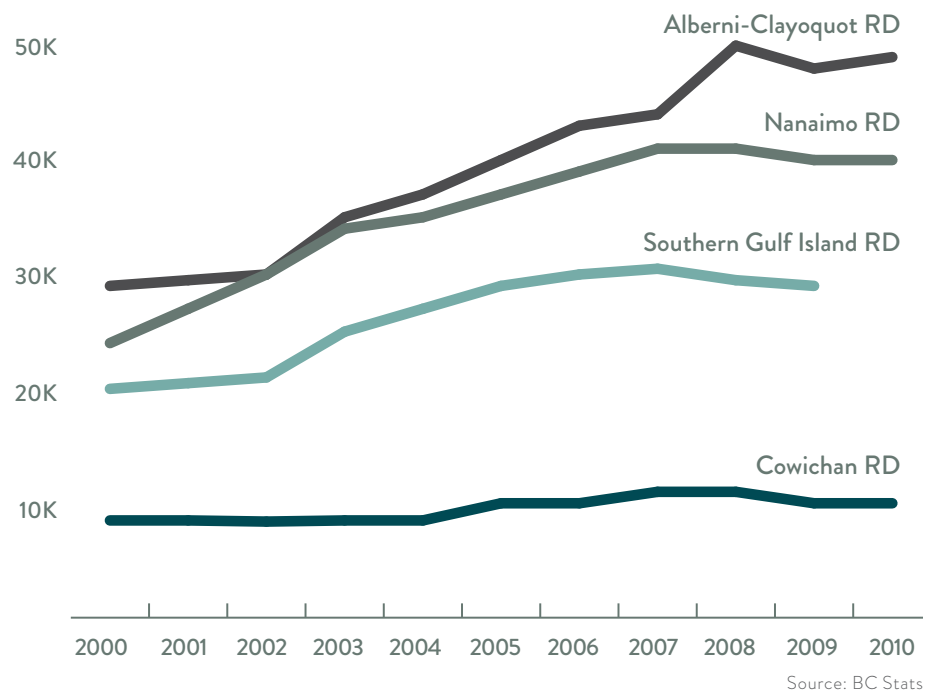


FIGURE 8:
South Central
Vancouver Island
Property and
Room Count
2000-2010

Year over year analysis of room revenue trends between 2000 and 2010 show strong growth attributable to an increasing room inventory, which occurred despite a drop in the number of properties

(Figure 8). Declines were seen in motels, vacation rentals, and fishing lodges, whereas the number of hotels grew modestly.

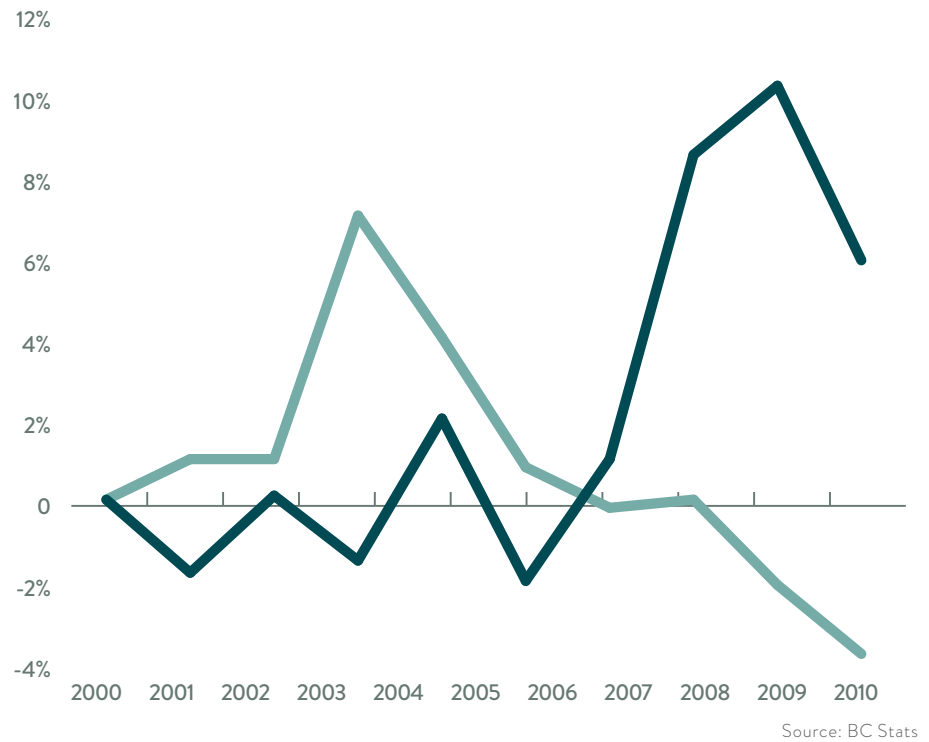
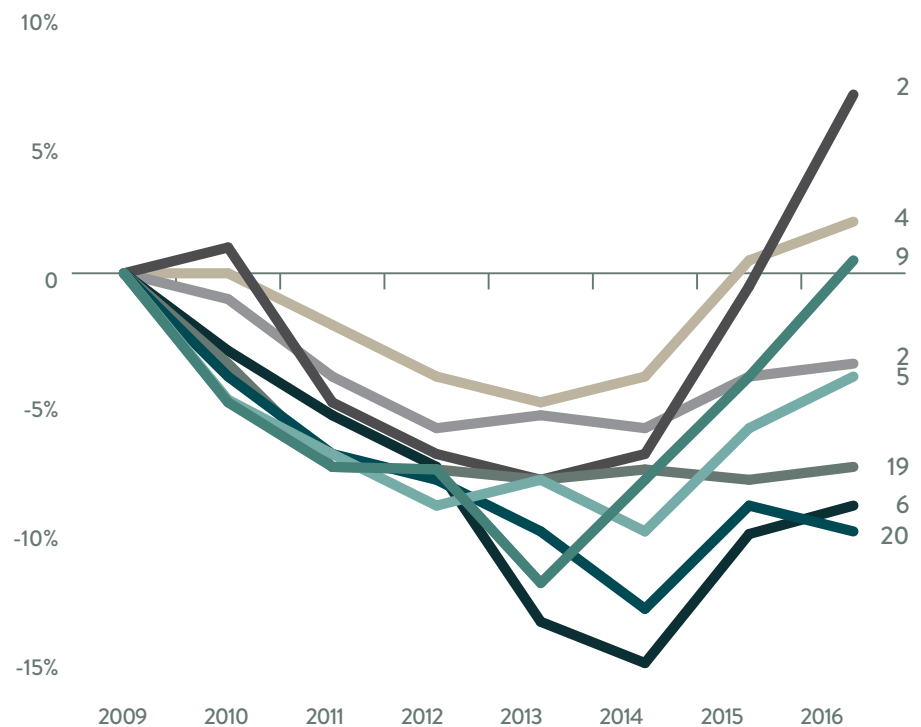


FIGURE 10:
South Central
Vancouver Island BC
Ferry Passengers by
Route Number
2009–2016

BC FERRIES

BC Ferry passenger volumes for the South Central Island routes between 2009 and 2016 are presented in Figure 10. Three of the eight routes generated higher volumes but the other five all declined. Total passenger volumes during this period were down 2%, from 6.7 million to 6.6 million. The greatest increase (7%) was seen in the Tsawwassen

to Duke Point route. Volumes on the Swartz Bay to Fulford Harbour route rose 2%, while Tsawwassen to Gulf Islands was virtually unchanged. Lower volume routes showed the greatest decline, 10% on Chemainus to Thetis and Kuyper islands and 9% on the Crofton to Chemainus service.



Source: BC Ferries

Note: Routes — 2 Departure Bay/Horseshoe Bay, 4 Swartz Bay/Fulford Harbour, 5 Swartz Bay/Gulf Islands, 6 Crofton/Vesuvius, 9 Tsawwassen/Gulf Islands, 19 Nanaimo/Gabriola, 20 Chemainus/Thetis/Kuyper, 30 Tsawwassen/Duke Point



E. KEY VISITOR MARKETS

BC residents account for 66% of total visitation and 41% of spending on Vancouver Island. Other major markets include US residents, other Canadians, and overseas visitors.

The predominant form of accommodation is staying with friends and relatives for all markets, except US visitors, who prefer fixed roof facilities. Camping and RV accommodation is used by BC residents and overseas visitors. Canadians and BC residents prefer nature-based activities while travelling to Vancouver Island, whereas US and overseas visitors are more likely to seek out historical and cultural activities. Regional markets in BC, Alberta, and Washington State tend to have a very favourable overall impression of the region as a place to visit (the highest of any BC tourism

region). These markets also have a high likelihood of recommending Vancouver Island as a leisure destination.

Parks represent a major destination attraction for domestic and international travellers, and in some cases are a key trip motivator. Provincial parks in the planning area hosted 2.6 million visitors in 2015, a 7% increase over 2014. Pacific Rim National Park Reserve performed even better with attendance growth of 15%. The large majority of visitors to the South Central Island planning area arrive and depart by ferry using private motor vehicles.

F. OVERVIEW OF TOURISM ASSETS, INFRASTRUCTURE, AND UNIQUE SELLING PROPOSITIONS

In total, in 2016 the planning area had approximately 574 fixed-roof accommodation properties (7,440 rooms), and 39 campground and RV operations had 3,783 sites available for use.

Approximately 1,300 businesses were either wholly or partially engaged in providing tourism services. A diversity of services were represented from

hospitality, guided tours, and major attractions to vibrant agritourism, and outdoor recreation sectors.



Some of the key tourism assets include:

- Pacific Rim National Park Reserve: The Pacific Rim National Park Reserve of Canada is made up of the Long Beach Unit, the Broken Group Islands Unit, and the West Coast Trail Unit. There are hiking trails through rainforests and extensive, sandy beaches.
- Wild Pacific Trail: The trail carves through old-growth thickets of the temperate coastal rainforest as it hugs the coastline of the Ucluelet Peninsula.
- Horne Lake Caves Provincial Park: This park protects, manages, and provides recreational access to several caves. It is recognized as one of the best natural outdoor sites in BC.
- BC Ale Trail: This trail stretches across the entirety of the province. The Vancouver Island portion of this trail stretches from Victoria to Campbell River with South Central Island destinations in Duncan, Nanaimo, and Tofino.
- Parksville Qualicum area north of Nanaimo is renowned for its beaches and the calm, warm waters of the Salish Sea.
- West Coast Trail: This 75 km long backpacking trail follows the southwestern edge of Vancouver Island between Port Renfrew and Bamfield.
- Carmanah Walbran Provincial Park: This old-growth forest sanctuary is amongst the largest on Vancouver Island. The area is famous for its giant cedar, fir, hemlock, and spruce trees.
- Wineries and Agritourism: The Cowichan Valley is the second largest wine region in BC, with vineyards dating back to 1860. Growers are producing wines with traditional vinifera grapes (Pinot Noir, Pinot Gris, Gewürztraminer, and Ortega), along with other varietals.
- Pacific Marine Circle Route: The recently-paved road between Port Renfrew and the Cowichan Valley allows a coast to coast journey that links Juan de Fuca, Haro, and Georgia straits as well as the Saanich Peninsula.
- Southern Gulf Islands include hundreds of islands and islets that form part of a larger archipelago.
- Nanaimo has a casual small town vibe but has also grown as a sophisticated centre of arts, culture, and education. It is ranked number one in Canada for most clear skies in summer, and is second only to Victoria for the mildest winters in the country. The revitalized downtown core includes a relatively new convention centre, cruise ship terminal, and harbourfront walkway to Departure Bay.

G. SUMMARY OF KEY STRENGTHS, CHALLENGES, AND OPPORTUNITIES

Tourism in the South Central Island planning area is distinctive, diverse, and growing, but at the same time it is facing a range of challenges. Visitor and industry metrics are relatively healthy, with almost all key indicators (ferry travel, highway travel, room revenues, occupancies, visitor centre, and parks attendances) trending upward in 2015 and again in 2016. The industry is well balanced geographically and in terms of

service offerings. Approximately 1,300 businesses are engaged in providing tourism services, with everything from accommodation and hospitality to guided outdoor recreation, major attractions, and a vibrant agritourism sector. Tourism accounts for approximately 7% of the region’s economic base. These key strengths, challenges, and opportunities are summarized below in no particular order.

FIGURE 10: Key Strengths, Challenges, and Opportunities

KEY STRENGTHS	KEY CHALLENGES	KEY OPPORTUNITIES
<ul style="list-style-type: none">• Increasing awareness• Air and sea access• Strong artisan culture• Nature-based and marine-based tourism• Committed volunteers• Accessible activities (for mobility challenges)• Product assets with potential to expand• Growth in agri-tourism• Education markets• Variety of economic development and funding organizations	<ul style="list-style-type: none">• Transportation barriers to, from, and within• Dependency on summer season• Service levels and quality experiences• Lack of meeting and accommodation space• Lack of guided activities• Downtown vibrancy• Year-round staff constraints, including skillsets, housing, transportation• Local support for tourism	<ul style="list-style-type: none">• Enhance transportation experience, including BC Ferries service• Recruiting, retaining and training staff• Develop/enhance product experiences• Indigenous tourism• Strengthen support for tourism development• Enhance quality of service and visitor amenities• Cooperative tourism management



A DISTINCTIVE DIRECTION

UCLUELET
Photo: Boomer Jerritt

THE DIRECTION FOR THE STRATEGY

A. VISION

The following 10-year vision was created and aligned with existing community plans and other planning frameworks, as well as the aspirations of the type of destination tourism partners would like the South Central Island to be in 10 years. The goals, strategies, and actions within this strategy have been

prioritized to achieve the elements identified within this vision.

The vision has been written as a two-part statement. The initial phrase relates to the visitor experience, and the secondary phrase relates to the aspirations for the tourism industry within the planning area.



EVERY VISITOR WILL BE INSPIRED BY
OUR DIVERSE RANGE OF REMARKABLE
WEST COAST EXPERIENCES THAT
HIGHLIGHT THE RICH CULTURAL HERITAGE OF
ISLAND LIFE AND THE MYSTICAL ELEMENTS OF
NATURE WHERE LAND AND OCEAN MEET.

WE WILL WORK AS AN INCLUSIVE AND WELL-
CONNECTED TOURISM “COMMUNITY” THAT IS
HIGHLY RESPECTED FOR ITS CONTRIBUTION TO
LOCAL “QUALITY OF LIFE”, OUR COLLABORATIVE
EFFORTS TO ENSURE THE SUSTAINABILITY OF
THE DESTINATION AND THE VISITOR ECONOMY,
AND THE WARMTH OF OUR WELCOME.

B. GOALS

Three destination development goals have been identified to support the vision for the South Central Island. For each goal, priority focus areas have been identified:

1. A go-to destination for EQ targets built on an exceptional combination of natural, built, and cultural experiences.
2. Widespread use of sustainability principles by local government, operators, and community partners.
3. A dynamic planning environment that embraces change through productive partnerships, strategic infrastructure priorities, and effective management practices.

In addition, the Destination BC Destination Development Program provides two common provincial goals that all 20 planning areas around BC will support:

1. Lead Canada in growth of overnight visitor expenditures
2. Secure the highest Net Promoter Score in North America

C. GUIDING PRINCIPLES FOR DESTINATION DEVELOPMENT

As the journey of destination development continues in the South Central Island, choices will have to be made and priorities set. The following guiding principles were developed by stakeholders to be used as touchstones for this decision-making:

- Supports and enhances existing community values and aspirations
- Builds on core attributes that make the destination distinctive
- Recognises the concept of sustainability as the underlying core value
- Aligns with provincial strategic priorities that relate to tourism
- Promotes collaboration and inclusivity as the basis of making progress
- Celebrates and respects the role of First Nations

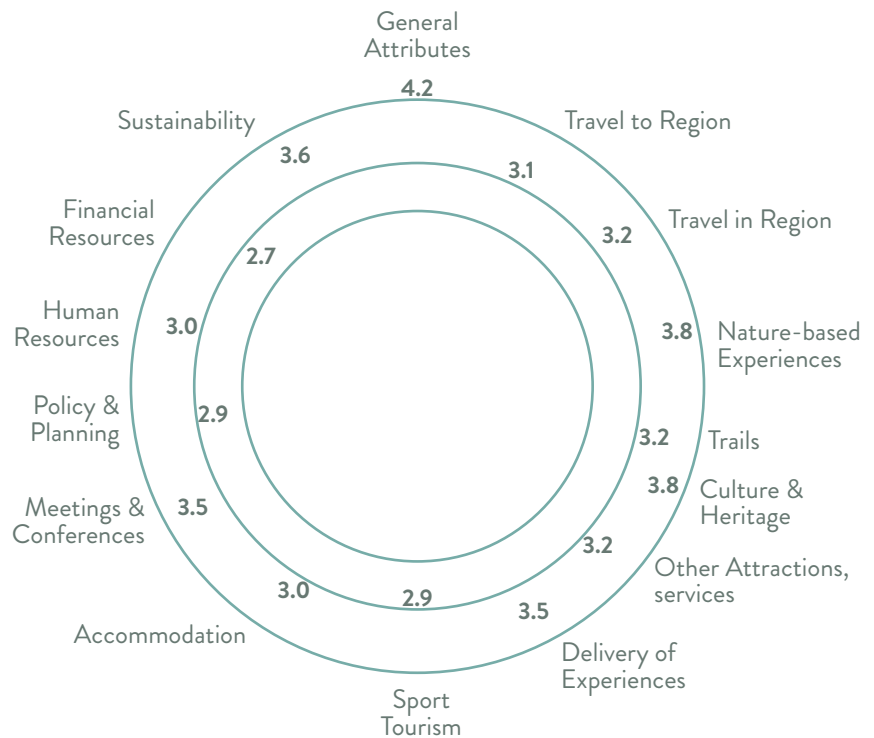
D. DESTINATION ASSESSMENT

The three major Experience Quotient (EQ) types identified for Vancouver Island are the same as those for BC: Authentic Experiencers, Cultural Explorers, and Free Spirits. The natural features of the planning area (beaches, coastline, marine wildlife, parks) are the foundation of its visitor experience, and its distinct competitive advantage. The development and integration of heritage, culture, and culinary experiences needs to be strengthened for visitation and spending levels to rise. There is a clear need for greater infrastructure, and access to both the natural and cultural environments. In some areas, the potentially adverse effects of high tourism levels are a concern. Smaller communities will have to manage limits to acceptable change to preserve both their quality of life and the visitor experience.

Local tourism partners who responded to the Destination Assessment Survey identified general attributes (e.g., crime, safety, natural environment, aesthetics), nature-based experiences, culture and heritage most favourably. Survey respondents found financial resources, the planning and policy environment, and the number of meeting and conference facilities most lacking. Other attributes were ranked somewhere in between.

FIGURE 11:
Destination
Assessment Summary
Main Elements

ASSESSMENT SUMMARY – MAIN ELEMENTS



Note: Score is based on a 1 to 5 scale with 5 being most positive.

To demonstrate how destination elements cumulatively act to draw visitors to the South Central Island planning area, the following set of core experiences were defined.

E. MOTIVATING EXPERIENCES

Six distinct motivating experiences were identified that elevate the core strengths of the destination, and align to the demand generators deemed most relevant to the desired visitor.

The motivating experiences are:

- The marine playground captures the extraordinary range of boating experiences, from the relatively placid waters of the Salish Sea to the wild, untamed open Pacific of the Island's west coast. Islands and archipelagoes are highly conducive to tourism activities, with power boating, sailing, diving, fishing, wildlife viewing, and sightseeing draw visitors from around the world. There are few truly iconic destinations in Canada, and the planning area is one of them, due to its marine environment.
- Nature-based adventures are built around the coastal temperate rainforest, unique biodiversity characteristics, and a complete range of land-based visitor experiences from mountain to

coastal and back country to front country. The national, provincial, and local park system provides a sustainable land base, and are important for drawing visitor interest.

- Indigenous tourism is in an emergent phase in the region, with numerous destination attractions. The rich cultural traditions of the Nuu-chah-nulth and Coastal Salish peoples have exceptional potential for expanding the experiences sought by the key Cultural Explorer market.
- The history of settlement and industry is multi-faceted and ever evolving as the region transitions from the mining, fishing, and forestry foundations of the past to new economic activities. Early explorers and settlement activities have their own set of fascinating stories that have strong appeal for US and overseas markets in particular.
- Coastal creativity refers to the dynamic arts, crafts, and cultural sectors that have attracted thousands of entrepreneurs and independent-minded tourism operators over the years. Whether it be world-class artisans, dynamic farmers markets, growing small-scale food production, innovative restaurants or a vibrant performing arts and festival scene, coastal creativity is a foundational experience for the planning area's visitors.
- Visitors to Vancouver Island and the South Central Island planning area in particular, quickly experience the relaxed, safe and welcoming island-coastal lifestyle. The distinctive small communities have their own charm that resonate with visitors for their genuine authenticity and complement the regional service centre of Nanaimo.

FIGURE 12: Key Attributes and Experience Themes of the South Central Island





F. DEVELOPMENT GOALS AND THEMES

Where should the South Central Island focus its destination development for the next 10 years so that it remains a competitive and sustainable destination?

The following graphic illustrates how the strategy is structured to accomplish just that, with three goals and six development themes.

A. DISTINCTIVE EXPERIENCES:

Currently, the planning area has distinctive experiences that can boast true destination status both domestically and internationally. Even so, the average number of nights per leisure visitor is the lowest of any development region in the province.

GOAL STATEMENT: A go-to destination for our EQ targets built on an exceptional combination of natural, built, and cultural experiences.

B. SUSTAINABLE DEVELOPMENT: The optimal use of environmental resources, respect for socio-cultural authenticity, and the equitable distribution of socio-economic benefits are the three hallmarks of sustainable development.

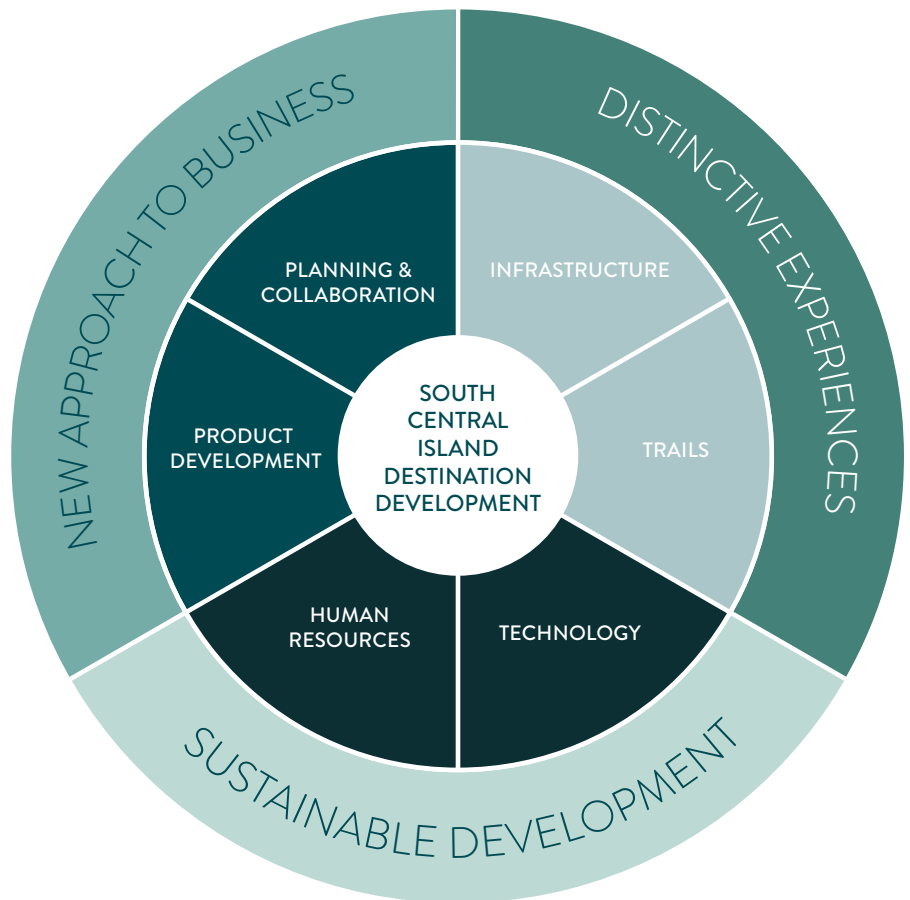
GOAL STATEMENT: Widespread use of sustainability principles by local government, operators, and community partners.

C. NEW APPROACH TO BUSINESS:

Feedback during the destination development process made it clear that the strategy should push strongly for new levels of collaboration that will pave the way for a more competitive tourism destination that embodies change management, adaptation, and innovation.

GOAL STATEMENT: A dynamic planning environment that embraces change through productive partnerships, strategic infrastructure priorities, and effective management practices.

FIGURE 13:
Development and
Destination Themes



G. INTERACTION OF DEVELOPMENT THEMES AND MOTIVATING EXPERIENCES

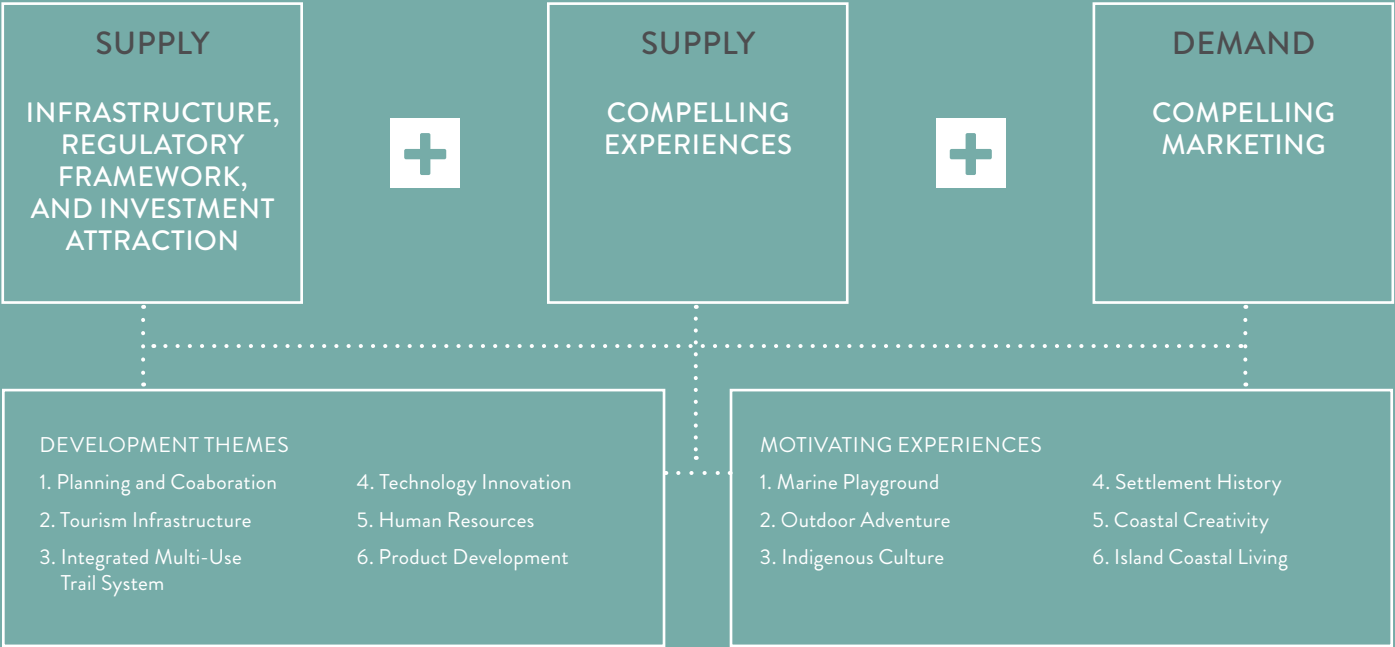
For any destination development strategy to achieve its goals, there must be coordinated interaction with the other components of the tourism development process. As mentioned in section 2, tourism has two primary revenue drivers — supply and demand. Destination development focuses on the supply side of tourism by providing the setting, access, policy framework, investment attraction, experiences, and visitor services to attract new visitors and entice repeat visitation. Demand side marketing efforts strive to create urgency for people to want to visit.

The interaction of supply, demand, development themes, and motivating experiences is cyclical. The process of developing supply drivers such as transportation, policy frameworks, and

investment attraction supports the development of compelling experiences — the supply drivers of products and services. These are then able to be marketed to potential visitors to generate demand. The marketing demand drivers lead to purchase decisions which result in visitation. Then, a new cycle of supply-side management and investment is set in motion to encourage competitiveness, sustainability, and tourism-driven benefits over the long term.

Each of the six development themes contributes to each of the motivating experiences determined for the South Central Island, although they will do so at different levels, based on the actual objectives recommended.

FIGURE 14:
Interaction of Development Themes and Motivating Experiences



7

STRATEGY AT A GLANCE

CARMANAH WALBRAN PROVINCIAL PARK

Photo: JF Bergeron

THE SOUTH CENTRAL ISLAND: A DISTINCTIVE DESTINATION

VISION	<p>Every visitor will be inspired by our diverse range of remarkable West Coast experiences that highlight the rich cultural heritage of island life and mystical elements of nature where land and ocean meet. We will work as an inclusive and well-connected tourism “community” that is highly respected for its contribution to local “quality of life”, our collaborative efforts to ensure the sustainability of the destination and the visitor economy, and the warmth of our welcome.</p>		
GOALS	<p>DISTINCTIVE EXPERIENCES</p> <p>A go-to destination for EQ targets built on an exceptional combination of natural, built, and cultural experiences.</p>	<p>SUSTAINABLE DEVELOPMENT</p> <p>Widespread use of sustainability principles by local government, operators and community partners.</p>	<p>NEW APPROACH TO BUSINESS</p> <p>A dynamic planning environment that embraces change through productive partnerships, strategic infrastructure priorities, and effective management practices.</p>
MOTIVATING EXPERIENCES	<ul style="list-style-type: none"> • Marine Playground • Nature-based Adventures 	<ul style="list-style-type: none"> • Indigenous Experiences • History of Settlement and Industry 	<ul style="list-style-type: none"> • Coastal Creativity • Island-Coastal Lifestyle
DEVELOPMENT THEMES	<p>THEME 1: Planning and Collaboration</p> <p>THEME 2: Tourism Infrastructure</p>	<p>THEME 3: Integrated Multi-use Trail System</p> <p>THEME 4: Technology Innovation</p>	<p>THEME 5: Human Resources</p> <p>THEME 6: Product Development</p>

STRATEGIC PRIORITIES

TERRACE BEACH
Photo: Mike Seehagel

The planning area's working group utilized a framework to determine the prioritization of each objective and the relative timing for implementation:

1. QUICK WINS — high value tactics with low complexity and can be achieved within 3 years (2017–2020).

2. LONGER TERM ACTIONS — high value, high complexity that require 4 to 10 years to achieve the result (2021–2027) albeit activities can begin immediately to achieve the outcome.

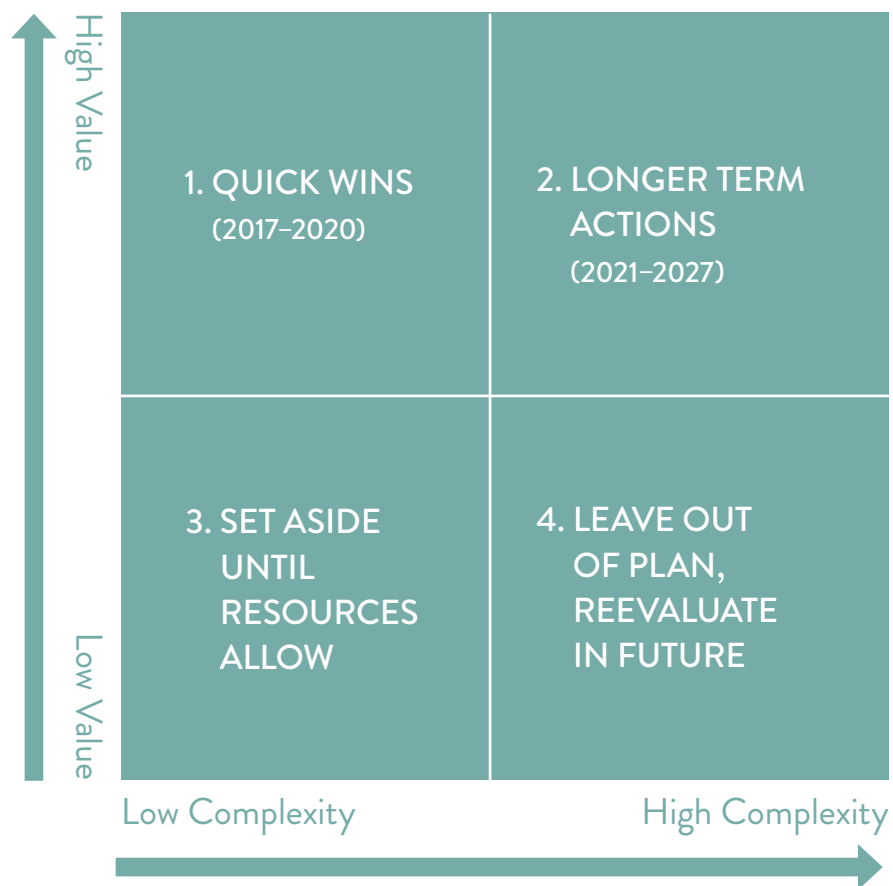
3. SET ASIDE UNTIL RESOURCES ALLOW — low complexity and low value, address when time and resources exist.

4. LEAVE OUT OF STRATEGY; RE-EVALUATE IN FUTURE — high complexity and low value, not realistically achieved in the 10-year time frame of this strategy.

Presenting the destination development objectives within a consistent framework will allow the province and the South Central Island to examine the various priorities, and identify which belong within a regional or provincial strategy. The success network is identified², and where the proposed objective has provincial or regional scope beyond this planning area, it is noted. This list does not represent all the opportunities that emerged during the planning process, but those that emerged as a higher priority for tourism destination development. The full list of planning considerations that informed the prioritization can be found in Appendix 2.

²Organizations and partners listed under the success networks have been identified collectively through the strategy development process as likely playing a role in moving a potential objective or action forward. In no way is this meant to suggest any form of commitment or endorsement of the objective or action.

FIGURE 15: Priority Setting Framework



OBJECTIVES AND ACTIONS

In total, 29 objectives have been identified for the South Central Island as a tourism destination for the next 10 years. The following section outlines the objectives by each development theme, the priority, and relative timing for implementation. It also identifies the

priority actions within each objective. This is not meant to be an exhaustive list of all tactical implementation activities. As such, objectives or actions may require a more detailed implementation plan.

THEME 1: Planning and Collaboration

OBJECTIVES

- A new framework for regional collaboration in the planning and development of tourism
- Strengthened representation of tourism interests within existing statutory planning processes
- Sustainable tourism development

THEME 1: ACTIONS	PRIORITY
<p>1. INTER-AGENCY MANAGEMENT MODEL: Given the complexity of tourism with the multiple interests involved, and the value to be gained from adopting a regional destination perspective on competitiveness and environmental sustainability, there is a need to regularly engage in multi-jurisdictional discussions on issues impacting destination development. For the implementation of this strategy to succeed over the coming 10 years, greater and more productive dialogue among provincial agencies is necessary. Ideally, this will lead to a more cohesive approach to resolving the supply factors identified in this strategy.</p> <p>The provincial government's West Coast Sector Agency already exists but does not include ministries responsible for tourism development, with the exception of FLNR's Recreation Sites & Trails BC. A more inclusive inter-agency structure also has the potential to establish a stronger advocacy voice in matters that lie outside the mandate of its representatives. The planning discussions for this strategy regard this recommendation as providing the basis of a best practice applicable to all of British Columbia.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Investigate the opportunity to formally extend the mandate of the inter-ministry West Coast Sector Agency to include tourism in its scope, and to connect Ministry of Tourism, Arts and Culture policy analysts with regional resource-based ministry decision makers. (catalyst project) • Review existing land and marine-based management models and identify principles, practices, and replicability of these models to the planning area: <ul style="list-style-type: none"> - The Marine Plan Partnership for the North Pacific Coast (MaPP) is a co-led process involving 17 First Nations and the provincial government. Four marine plans that include the identification of Tourism and Recreation Special Management Zones, a regional action framework and plan, and implementation agreements have been put in place. - The Pacific North Coast Integrated Management Area (PNCIMA) initiative involves First Nations, and federal and provincial government staff working together on a Steering Committee that provides strategic direction and executive oversight. It seeks to engage all interested parties in the collaborative development and implementation of an integrated management plan. <p>SUCCESS NETWORK Provincial and federal land and ocean-based ministries and agencies, local government, First Nations, Ministry of Indigenous Relations and Reconciliation, TVI</p>	1. QUICK WINS
	PROVINCIAL SCOPE
	REGIONAL SCOPE

THEME 1: ACTIONS	PRIORITY
<p>2. COMMUNITY TOURISM PLAN: Tourism planning has traditionally had a strong marketing focus and is often spear-headed by DMOs at either the local or regional level. Local governments may be involved at different levels, for example by supporting the planning process, the recommendations and plan implementation; but rarely is tourism planning directly reflected in or backed by local legislation in a manner akin to Official Community Plans. Yet there is growing recognition that tourism has the potential to affect a community's socio-economic position in different ways, many of them positive but with some that are negative. Developing a more structured approach to regional tourism planning would give communities greater opportunity to manage tourism supply in a way that keeps the sector growing while minimising or mitigating the adverse effects that may arise.</p> <p>A more integrated and formalized planning approach would be beneficial at all levels — federal, provincial, and local. The explicit recognition of tourism in statutory and policy frameworks would help to address gaps, concerns, and opportunities related to sustainable tourism development. Greater dialogue with First Nations economic development officers would assist in highlighting emerging investment and development opportunities, and will play an important role in the implementation of both this plan and other forms of tourism planning that may emerge from this development plan.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • As Official Community Plans within the planning area's communities come up for updating or renewal, tourism should be promoted for specific consideration in the consultation process and a section of the Plan should be dedicated to defining objectives and policies that will guide its development. • Encourage local government to explicitly address tourism through the available planning tools allowed by the Local Government Act — regional growth strategies, regional context statements, and implementation agreements. • Integrate tourism into other related planning processes, including agriculture (role/direction of agritourism), heritage conservation, signage, transportation (see following sections), parks, recreation and trails, and site master planning. • Promote integrated destination planning and development for tourism. • Encourage regular dialogue between economic development officers and DMOs within the region on issues and opportunities relating to destination development. • Develop an Interpretation System Master Plan for Vancouver Island and the Gulf Islands. Such a plan would identify key resources, their stories, and experiences that can be developed into distinct and desirable products for specific market segments. <p>SUCCESS NETWORK Local government, First Nations, DMOs, TVI, economic development officers, business organizations</p>	1. QUICK WINS
	REGIONAL SCOPE

THEME 1: ACTIONS	PRIORITY
<p>3. ENVIRONMENTAL AND SOCIAL SUSTAINABILITY: A core aspiration identified in the planning discussions was a strong commitment to sustainability, particularly as it relates to the environment, but also socio-community considerations. The planning area is fundamentally a nature-based tourism destination whose defining attributes are overwhelmingly natural. As these features become better known and accessible to more travel markets, the potential for degradation increases not only for the natural environment, but for man-made infrastructure and amenities as well. Practically every community in the planning area has to deal with some aspect of sustainability whether it be directly or indirectly associated with tourism, such as growth pressures, over-use, derelict vessels, water use, waste management, marine safety, and renewable energy.</p> <p>The Pacific Rim and Southern Gulf Islands, being smaller rural areas, are facing particular pressure. As examples, the Saturday Market on Salt Spring and downtown Tofino have seen visitor activity create parking and access problems, as well as negative feelings about tourism.</p> <p>In building a culture of sustainability, the planning area should provide both planning guidance and program assistance that make it integral to the visitor experience of the future.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Build awareness of limits to growth at the community level and identify relevant capacity thresholds. • Compile and promote best practices for addressing infrastructure capacity issues to communities in the planning area. Water, waste, renewable energy, visitor parking, and growth management were all identified in the destination development process. • Develop and strengthen the application of policies and procedures relating to the removal of derelict vessels and the clean-up of marine waste and debris. • Work across governments to develop relevant policies to protect landscape heritage values, such as supporting the preservation of heritage roads in the Southern Gulf Islands. • Develop a Tourism Sustainability Plan and Handbook. If tourism is to be successfully integrated into the environment, communities, and the minds of residents, a robust sustainability plan must be produced that fully respects natural and social carrying capacities and ensures the business of tourism is conducted within acceptable levels of change. (catalyst project) <p>SUCCESS NETWORK Local government, First Nations, provincial and federal governments, Islands Trust, TVI</p>	<p>1. QUICK WINS</p> <p>PROVINCIAL SCOPE</p>
<p>4. INDIGENOUS TOURISM DEVELOPMENT: The region has 24 First Nations whose rich cultural heritage has an increasingly prominent role in the visitor experience, and whose environmental interests and values can positively influence tourism sustainability. A number of First Nations are already involved in developing and operating major destination attractions and planning strategies are in place for the development of potential new product (see Indigenous Experiences under Product Development). Working collaboratively will ensure that Indigenous Experiences are a core component of the overall destination experience.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Ensure that the tourism interests of the First Nations are fully represented within the activities of the Inter-Agency Management Committee. Review the framework of MaPP as a model for providing the structure for ongoing discussions. • Review opportunities to assist and facilitate the implementation of existing First Nations' tourism plans, such as the Clayoquot First Nations Community Perceptions Study (2014). In particular, support those First Nations that are already leading the way and championing the development of new tourism businesses — including the Nuw'chah-nulth and the Huu'ay'aht First Nations. • Strengthen links between the region and the Indigenous Tourism Association of BC through a region-specific indigenous tourism specialist. A region-specific Indigenous tourism specialist will bolster the development of First Nations tourism throughout Vancouver Island by enabling new discussions and supporting ongoing implementation of related initiatives. (catalyst project) • Where plans are in place, such as the Clayoquot First Nations Community Perceptions Study, work collaboratively to determine appropriate ways of strengthening supporting infrastructure and transportation. • Work toward developing a stronger understanding of the concept of First Nations territory among visitors to the planning area through appropriate forms of cultural interpretation. This can, and should, include introducing visitors to First Nations language and world views. <p>SUCCESS NETWORK ITBC, First Nations, Ministry of Indigenous Relations and Reconciliation, local and provincial governments, TVI</p>	<p>2. LONGER TERM ACTIONS</p> <p>PROVINCIAL SCOPE</p>

THEME 1: ACTIONS	PRIORITY
<p>5. FUNDING POLICIES: The availability of funding for tourism development varies across the planning area and can be a constraint to planning, especially in smaller, rural communities. A number of communities have the Municipal and Regional District Tax in place or, as in the case of Port Alberni, an additional voluntary surcharge, while Tofino and Ucluelet benefit from the Resort Municipality Initiative. The Rural Dividend Fund has been used to support many tourism projects over the last two years.</p> <p>However, there are numerous challenges with each of these funding sources. For example, the MRDT funds tend to be largely assigned to marketing and promotional activities. Securing monies for infrastructure and destination development projects are permitted only under special circumstances.</p> <p>A review of existing funding policies and potential new approaches for destination development needs consideration. Importantly, opportunities for having the tourism industry involved in funding, and government, should be identified.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Prepare and maintain a database of tourism destination development funding sources from all levels of government, and identify opportunities for leveraged and coordinated investments between communities. • Create a regional funding network, with the involvement of DMOs, First Nations, and local government, that would allow communities to see what others in the region are doing to fund tourism. This regional funding network would allow for collaboration on select projects. • Request that the provincial government undertake a policy review of existing programs and initiatives to identify how destination development can be sustainably funded in the future. The focus should be firstly on MRDT and the Resort Municipality Initiative; and, secondly on infrastructure and other destination development targets not involving marketing. • Investigate the feasibility of a grant writer dedicated to raising funding for regional (as opposed to individual community) destination development projects. <p>SUCCESS NETWORK Local government, MRDT communities, DMOs, TVI, Destination BC, Ministry of Finance, Ministry of Tourism, Arts and Culture, business associations</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	PROVINCIAL SCOPE

THEME 2: TOURISM INFRASTRUCTURE

OBJECTIVES

- A productive process for identifying and prioritizing tourism infrastructure
- Quality land, air, and water-side transportation and community tourism infrastructure
- Public tourism infrastructure that leverages private sector tourism investments

THEME 2: ACTIONS	PRIORITY
<p>6. VANCOUVER ISLAND TRANSPORTATION PLAN: In 2014, the provincial government produced a 10-Year Transportation Plan, <i>BC On the Move</i>, which outlined initiatives highly relevant to the South Central Island, including highways, ferries, transit, airports, cycling and trails. One of the overriding concerns at the planning sessions was the need for such higher-level plans to take greater account of tourism interests, recognizing that for many communities it represents a key economic growth target for the future. More specific issues of concern include transit connectivity between ports and airports and the future of the E&N rail line.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Request the provincial government lead the preparation of a Vancouver Island Transportation Plan as a regional sub-plan of <i>BC On the Move</i>. • Work with other partners such as regional districts (which have their own transportation plans), the Vancouver Island Economic Alliance, and Vancouver Island Association of Coastal Communities to establish a Tourism Transportation Task Force for the purpose of preparing a tourism transportation policy brief. <p>SUCCESS NETWORK Local government, Vancouver Island Association of Coastal Communities, transportation service providers (ports/terminals, airports), BC Transit, Ministry of Transportation and Infrastructure, Vancouver Island Economic Alliance, TVI</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	REGIONAL SCOPE
<p>7. CONNECTING THE SOUTHERN GULF ISLANDS: Getting around the Southern Gulf Islands can be challenging for many visitors, especially those travelling without a personal vehicle. The Capital Regional District completed an Integrated Service Review with options for non-vehicle, inter-island marine connections. Recommendations in the completed Southern Gulf Islands Tourism Concept Plan included transportation improvements such as passenger only small craft linkages between islands. Services available during the Tour des Iles have experienced good uptake, and a similar level of service for moving visitors within and between islands would be beneficial for tourism operators, visitors, and residents.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with the Capital Regional District and Experience the Gulf Islands to study the feasibility of expanding the Tour des Iles small craft services beyond the event itself. • Provide research on best practices in small island transportation models, and assist with communications with BC Ferries on how they could contribute to a more flexible local water transportation service. <p>SUCCESS NETWORK Capital Regional District, Experience the Gulf Islands, BC Ferries, TVI</p>	1. QUICK WINS

THEME 2: ACTIONS	PRIORITY
<p>8. PORT ALBERNI CONNECTOR: This opportunity refers to a paved route from Port Alberni to Bamfield and on to Cowichan that the City of Port Alberni and Huu-ay-aht First Nation have been investigating as a circle route to complement the highly successful Pacific Marine Connector that connects Port Renfrew to Cowichan. Note: This is different than the Port Alberni to Highway 19 alternate route, also referred to as the connector that was studied and deemed to have a negative benefit to cost ratio by the Ministry of Transportation and Infrastructure.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Assist the City of Port Alberni, Regional District and Huu-ay-aht First Nations with identifying and promoting the benefits of the connector, using research gathered from the successful Pacific Marine Circle route. Work with partners to encourage the Ministry of Transportation and Infrastructure to prioritise the Connector in their capital planning. <p>SUCCESS NETWORK Ministry of Transportation and Infrastructure, City of Port Alberni, Huu-ay-aht First Nation, FLNR (Rural Dividend and Crown Lands), Ministry of Indigenous Relations and Reconciliation, Alberni Clayoquot Regional District, Port Alberni Port Authority, TVI</p>	<p>2. LONGER TERM ACTIONS</p>
<p>9. HARBOUR INFRASTRUCTURE: Recreation boating has a major economic impact on the South Central Island economy, and increased boating activity and spending is being promoted by initiatives such as the BC marine trail initiatives. However, to be effective in growing this sector, harbour infrastructure must be improved. Important considerations include: the lack of short term moorage space for visiting boaters; the lack of basic services such as pump-outs at small harbours; deteriorating public docks; and, small harbour management that does not accommodate the needs of visiting boaters. These deficiencies create lost opportunities both in terms of accommodating more visitor boating activity and in terms of connecting those boaters with tourism experiences within communities. Identified improvements would not only benefit visitors, but island residents alike.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Prepare a fact sheet promoting the development of more short-term moorage to accommodate visiting boaters and the need for accommodating tourism values in small craft harbour management. Develop a policy response to the federal government's Divestiture Program to ensure any transfer and ownership of designated recreation and low-activity harbours does not harm the future availability of marine infrastructure. (catalyst project) Identify gaps in small harbour services and prioritise infrastructure improvements for visiting boaters. <p>SUCCESS NETWORK Fisheries and Oceans Canada, port and harbor authorities, local governments, harbor and maritime societies, TVI</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>

THEME 2: ACTIONS	PRIORITY
<p>10. HIGHWAY SIGNAGE: Many visitors have difficulty navigating highways and roadways in the planning area, finding their way to destination attractions, and other tourism sites. Technology has mitigated this issue somewhat with online search and map functions, but signage plays an important role in way finding and brand identity. It is noted that the regulatory environment for signage is complex with federal (national parks), provincial (highways and parks) and local (municipal roadways and buildings) components. A unified signage approach, while compelling from the visitor's standpoint, is not a simple matter in a multi-agency regulatory environment.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Obtain and review the Community Signage Manual originally published by the Tourism Research Innovation Project (TRIP), of which Malaspina University (now Vancouver Island University) was a member. • Conduct a region-wide signage audit, using the guide prepared by TRIP. • Prepare an inventory of local government signage manuals and policies and work with signage partners on a region-wide signage framework. • Work with small communities to identify, report, and monitor provincial highway signage standards. • Work with First Nations to integrate their needs and expectations, as noted in the Vancouver Island Regional Aboriginal Tourism Strategy (2014). <p>SUCCESS NETWORK Ministry of Transportation and Infrastructure, local government, Vancouver Island University, Destination BC, ITBC, TVI</p>	<p>2. LONGER TERM ACTIONS</p> <p>PROVINCIAL SCOPE</p>
<p>11. ALTERNATIVE FORMS OF TRANSPORTATION: The South Central Island already exhibits many characteristics of a slow, sustainable tourism destination. Small, compact communities, many of which are coastal, a well-established agritourism and food cluster, and a growing network of greenways and trails collectively contribute to the Island-coastal Living and Coastal Creativity experiences. Communities are investing heavily in supportive infrastructure, while in some areas like the Southern Gulf Islands, alternative transportation options are as much a minimum requirement as just another option. The planning area could be reinforcing its sustainability pledge and evolving slow tourism by supporting and developing non-conventional forms of transportation.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Research best practices and opportunities for alternative forms of transport such as transit services, rental vehicles, car-sharing, bicycles, and ebikes. • Assess the benefits of alternative transportation modes and encourage regulatory conformance among local governments. • Evaluate the utility of alternative transportation in supporting the region's sustainability brand promise. • Identify new infrastructure associated with the Sun Country Highway Municipal Destination and other similar national and association programs. The Burnaby Board of Trade's Sustainability Pledge has received global recognition and could be delivered to the planning area. <p>SUCCESS NETWORK Local government, First Nations, Ministry of Indigenous Relations and Reconciliation, Ministry of Transportation and Infrastructure, airports, port authorities, harbour commissions, federal and provincial parks, tourism operators, TVI</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>PROVINCIAL SCOPE</p>

12. HOUSING: The availability of worker housing and the effects of short term rentals are major issues for a number of the communities in the planning area, particularly in the Pacific Rim and Southern Gulf Islands areas. Smaller communities are especially vulnerable given their remoteness from large urban centres, seasonal fluctuations in employment opportunities, and the prevalence of non-resident workers. In Parksville Qualicum Beach, the shortage of rental stock means some hospitality workers have to commute from Nanaimo or stay in dormitory facilities. An expected increase in new hotel rooms over the coming years is likely to exacerbate the situation. For areas like the Southern Gulf Islands and Pacific Rim, there are similar pressures and, commutes from nearby larger centres are not available to address the issues.

For tourism operators in need of non-resident staff, the lack of affordable and available housing, coupled with high living costs, can be detrimental. Lack of housing inhibits the supply of workers, recruitment efforts, and labour productivity. In turn, this forces some proprietors to work excessive hours, scale back operations, and potentially withhold new investments in their facilities. Worker housing was a highlight issue in the 2012 British Columbia Tourism Labour Market Strategy.

The issue of short term rentals also has implications for housing and homeless at the broadest level but unfortunately data for quantifying the problem is lacking.

Some communities such as Ucluelet have responded with programs to monitor the short-term rental market. While such programs have a regulatory mandate to ensure landlords are operating within the law, they can have a positive spinoff for non-resident and temporary workers seeking long term accommodation.

ACTIONS

- Assess local government housing initiatives in the region and identify the implications for the tourism labour market. A review of Ucluelet's contracting of Host Compliance LLC to support the enforcement of existing municipal regulations may be relevant and applicable for other areas.
- Review best practices in other resort communities and prepare a research brief with lessons learned that may be applied regionally. Major resort communities like Whistler and Sun Peaks have innovative approaches to worker housing and although some are tied to municipal legislation (such as housing authorities), others may have relevance for the region's communities.
- Explore modular housing opportunities as a possible solution for seasonal workforce accommodation.
- Investigate the feasibility of a tourism housing strategy, which would have to have the full support of local government.
- Improve and expand collaboration among industry, government, and other stakeholders on the implementation of region-wide housing solutions.
- Provide information to all levels of governments on barriers to recruiting and retaining staff, particularly in rural areas (e.g., barriers related to transportation, lack of accommodation, high cost-of-living, etc.).

SUCCESS NETWORK Local government, BC Housing, go2hr, TVI

2. LONGER TERM ACTIONS

PROVINCIAL SCOPE

THEME 3: Integrated Multi-use Trail System

OBJECTIVES

- Coordinated, inter-regional and community trail planning
- Consistent trail standards and branding
- Development of at least one new iconic trail

THEME 3: ACTIONS	PRIORITY
<p>13. REGIONAL TRAIL PLANNING: A coordinated regional approach to trail planning is highly recommended as an alternative to the current situation where multiple entities are engaged in multiple trail initiatives, both land and marine-based. For example, the Capital Regional District is preparing a Gulf Islands Regional Trails Plan, the Cowichan Regional District has a series of Parks and Trails Master Plans underway and the Alberni-Clayoquot Regional District has Regional Parks and Trails Policy.</p> <p>Recreation Sites and Trails BC, BC Parks, Parks Canada, and the Ministry of Agriculture have their own trail planning policies.</p> <p>It is vitally important for local groups and government to be thoroughly invested in community trail projects as it provides the bottom-up impetus that makes regional coordination attractive in the first place. There is also a broad area of common ground where communities could collaborate to share their planning experiences regarding private land issues and access, liability, highway access to trail heads, inter-connectivity of trails, relationship and network building, inter-community cooperation, and reconciling resident and visitor needs.</p> <p>Tourism Vancouver Island's Hiking Tourism Master Plan is a valuable foundation for more effective regional trail planning and as a destination demand generator.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Use the Hiking Tourism Master Plan (Master Plan) as a baseline for creating a trails inventory, consult with other trail organizations (e.g., cycling, equestrian) to add information and fill data gaps. Municipal trail systems should be included. It should be noted that the large majority of trails documented in the Master Plan are multiple-use trails (and not just hiking), and there is good market potential in all categories, with cycling being a higher-value market than most. • As also recommended in the Master Plan, spatial and/or GIS functionality would allow the creation of a trails atlas, map products and a more effective planning process. The Master Plan's recommendation for an annual "call" to update the inventory should be prioritised. • A cost and benefit methodology for prioritising trail developments and improvement should be created. This will help inform and focus discussions about where resources and efforts can best be allocated. Unique or iconic trails may appear the most appropriate on the surface, but may not actually represent the best economic return. Issues of regional equity and connectivity should also factor into discussions. • The Master Plan recommendation for exceptional experiences should also be implemented, with consideration given to all forms of trail use. • Increased engagement with the provincial government (as recommended in the Trails Strategy for British Columbia), local government, and trail groups would lead to a better planning environment by bringing additional resources and experiences to the planning table. <p>SUCCESS NETWORK Local government, Parks Canada, BC Parks, Recreation Sites and Trails BC, Ministry of Agriculture, trail societies and stewards, community groups, First Nations, Ministry of Indigenous Relations and Reconciliation, Trails BC, Cyclo Tourism BC, BC Cycling Coalition, Horse Council BC, Trans Canada Trail Foundation, TVI</p>	2. LONGER TERM ACTIONS
	REGIONAL SCOPE

14. TRAIL DEVELOPMENT AND MAINTENANCE: In assessing the Vancouver Island region, the Hiking Tourism Master Plan identifies the absence of a coordinated regional hiking experience brand or marketing strategy. This leads to a much larger question of how the entire trail network, with accommodation for all user groups, can be effectively developed so that all trail stewards and supporters have a sense of contributing to regional progress that complements and leverages local progress. While this gap was highlighted as a marketing issue (e.g., how to give visitors the impression that there exists a seamless system of trail experiences), it is also an issue on the trail development side as the product must be in place to back up the marketing promise. Specific issues identified at the planning sessions include:

- Adopting consistent trail design, signage, and map standards so there is a continuity of experience from one sub-region to the next for visitors and users
- Monitoring and reporting of trail conditions
- Dealing with anti-social behaviour on trails
- Managing for multiple uses
- Encouraging public agencies to live up to their legislated responsibilities for trails infrastructure like deteriorating trail signage
- Funding for trails, amenities, and related infrastructure

ACTIONS

- Support the completion of the long-distance trails that are already underway, including Vancouver Island Spine, Trans Canada, E&N, and Experience the Gulf Islands.
- Develop a Vancouver Island trail policy handbook to guide communities and stewards in their development efforts. The handbook would outline a common approach to liability, maintenance, constructions, costs, uses, management, and access policy, and specifically address transitioning and continuity of trails passing from municipal and private lands to Crown lands. It could also include guidelines for working with First Nations in matters of consultation in their traditional territories but also on trail development partnerships.
- Five priority trail projects should be identified, and work plans prepared for funding, amenities and services development, marketing by DMOs, and initiatives to encourage tourism operators to develop market-ready experiences. (catalyst project)
- Identify the integrated regional and community trail system through all the Southern Gulf Islands as the Islands in the Salish Sea Destination Loop of the Trans — Canada (Great) Trail.
- Encourage product and experience development on trails by promoting business opportunities for guided experiences, rentals, and other services that could be delivered to users and visitors. This topic is discussed more fully in Product Development (Packaging and Itineraries) and the Technology Innovation (App development) sections of this strategy.

SUCCESS NETWORK Recreation Sites and Trails BC, local government, First Nations, Ministry of Indigenous Relations and Reconciliation, trail societies and stewards, Trails BC, Trans Canada Trail Foundation, TVI

THEME 3: ACTIONS	PRIORITY
<p>15. ACCESSIBLE TRAIL DESTINATION: Trails designed and marked for accessibility enable users with a disability to enjoy them with little to no assistance. Universal design standards for accessibility are common in North America. By taking what is being practiced in leading communities and applying it to the South Central Island planning area will make the trail systems as inclusive as possible and create a potential outdoor recreation niche that has a significant market in the Lower Mainland, the Seattle area, and globally.</p> <p>Accessible tourism will only grow in the future, especially as the workforce and the travelling public continues to increase in average age. Destinations that make universally designed tourism products, services, and environments available for the disabled will be able to take advantage of growing markets, particularly in western countries.</p> <p>The provincial government's Accessibility 2024 strategy aims to make BC the most progressive province in Canada for people with disabilities, and has identified tourism opportunities and parks projects as areas of immediate opportunity. Municipalities are already proactively dealing with accessibility. For example, the Access Oceanside Association provides a resource guide for persons living with a disability in this region. Nanaimo and other communities provide accessibility requirements for all new building construction. The City of Duncan recently launched two pilot projects (accessible domes, accessible pedestrian signals) to help the disabled (in this case the blind) better navigate the city.</p> <p>A focus on trail accessibility would create a critical mass of accessibility features that could become a market-ready product with more active tourism operator involvement.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Establish a set of guiding principles for trails accessibility in the planning area. The principles would create a common platform for discussion and the promotion and expansion of trails, facilities, and experiences that meet accessibility standards. • Develop an Accessible Vancouver Island guide for accessible trails development. The guide would not be for visitor use (i.e., a visitor guide), but one for local government, stewards, and other tourism partners who wish to enhance their overall accessibility. Core content would include design, construction, and maintenance of accessible trails, trail facilities and park facilities, including assistive technologies. The Government of Ontario provides helpful guidelines on making public spaces accessible, and association partners in BC can also provide resources. Another example of accessible trail resources is housed by American Trails. (catalyst project) • Work with BC Parks and the leveraging of accessibility initiatives identified in the BC Parks' Futures Strategy. • Identify a small group of projects for accessibility improvements, prioritising connectivity with existing urban or park trails that already meet accessibility criteria. The Barrier Buster program sponsored by the Rick Hansen Foundation is a possible source of funding. <p>SUCCESS NETWORK Local government, British Columbia Mobility Opportunities Society, Spinal Cord Injury BC, Rick Hansen Foundation, local government, Recreation Sites and Trails BC, BC Parks, Parks Canada, local disability associations, TVI</p>	2. LONGER TERM ACTIONS
	REGIONAL SCOPE

- 16. MARINE TRAILS:** The South Central Island's distinctive coastal environment means that even inland areas are not far away from the marine influence or experiences. For visitors, it is what makes the area such an attractive destination.

The BC Marine Trails Network Association unveiled the Salish Sea Marine Trail as the marine portion of the Trans Canada Trail linking the BC mainland to Vancouver Island. It is expected to become a world-class paddling challenge, as well as a focus for all south BC paddling on the coast by securing access points and safe havens along the entire route. Hubs will be service centres to cater to the flow of visitors, bolstering tourism, and the paddle sports industry.

The BC Ocean Boating Tourism Association is supporting and promoting the trails network through AHOY BC, so trails efforts include both non-motorized and motorized boating.

The full benefit of marine trails is not from the select number of people who do entire routes over multiple days, but in building up high use staging areas that provide excursions and day-trips for the full range of boaters, both enthusiast and casual. At the same time, initiatives like the Salish Sea Marine Trail have a strong appeal for adventurers who are interested in multi-day challenges, and broadens the market potential for marine products. Developing half day and full day trips, off the main Marine Trail, will provide many opportunities for guided and self-guided experiences.

A considerable amount of work is required to coordinate infrastructure, streamline land-side transportation services, and encourage tourism operators to expand their market ready offerings.

ACTIONS

- Work with marine tourism partners, notably the BC Marine Trails Network Association and AHOY BC, on the continuing development of the new Salish Sea Marine Trail: (catalyst project)
 - Assist with the inventory and assessment of sites along the coastline that will contribute to a stronger marine trails network
 - Identify service hub, and target assistance to creating stronger staging areas for marine tourism along the route
 - Encourage the integration of indigenous tourism themes, products, and partners in trail activities and promotions (For example, First Nations commercial campgrounds operated by the Penelakut and Lyackson First Nations could be key parts of the trail.)
 - Evaluate the 2017 Trans Canada Trail 150 Anniversary celebrations and consider an ongoing event series to maintain operator interest in the trail as a destination attraction
 - Participate in discussions and coordination with the Washington State marine trail initiative
- Identify locations for new destination marina capacity in underserved areas.

SUCCESS NETWORK BC Marine Trails Network Association, AHOY BC, BC Ocean Boating Tourism Association, local paddling and boating clubs, Outdoor Recreation Council, Recreation Sites and Trails BC, port authorities, marinas, Marine Trails Society, Washington Water Trails Association, TVI

2. LONGER TERM ACTIONS

REGIONAL SCOPE

THEME 4: Technology Innovation

OBJECTIVES

- Expanded capacity for connectivity
- A greater integration of technology into the visitor experience
- Increased update of technology best practices by tourism partners

THEME 4: ACTIONS	PRIORITY
<p>17. CELLULAR AND BROADBAND SERVICES: Digital capability is a critical component of a destination's competitiveness given the growing use of the internet for information, communication, marketing, and transactional activities. The Canadian Radio and Television Commission has recently ruled that high-speed internet is now a basic service for all Canadians, and that participation in the digital economy should be available to all.</p> <p>In the planning area, cellular services are relatively good on the east coast, are largely absent off the main highways, and noticeably spotty in the Southern Gulf Islands and in the Pacific Rim. There are some significant dead zones such as Ganges Harbour which are seen as deterring visitation especially amongst the boating community. In other areas like Galiano, local improvements are planned but there is local resistance because of cell tower-related health concerns.</p> <p>Broadband services, including wi-fi is another problem area in some communities, although the gaps are closing, for example with the recent fibre optic installation along Highway 4.</p> <p>It is noted that in some instances being offline can be an integral part of the visitor experience and not all destination areas need to be online. Cellular and broadband services are as much about industry development and participation in the digital economy as much as they are about visitor needs while in the destination</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Inventory cell coverage in the main service areas and identify gaps, with priority given to those where the lack of service is known to have significant adverse effects on the visitor experience. • Identify planned future improvements by major service providers. • Develop a region-wide plan that targets expected coverage in 10 years, and proposes options for closing the gaps through expansion of major telecommunications coverage. • Coordinate with evolving federal regulatory initiatives on cell and broadband strategies, including affordable access and minimum targets for network availability and speeds. Canada has set universal service targets and appropriated funding that the region should access if needed (see Connect to Innovate below). • Monitor the federal governments universal broadband goal of 50Mbps and unlimited data for all Canadians. <p>SUCCESS NETWORK Local government, Innovation Island, telecommunications companies, First Nations, Ministry of Indigenous Relations and Reconciliation, federal government (Pathways Project, CRTC, Connect to Innovate), TVI</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	PROVINCIAL SCOPE

THEME 4: ACTIONS	PRIORITY
<p>18. APP DEVELOPMENT: The use of smartphone applications in the tourism industry has expanded exponentially over the last decade. Smartphones have altered the traditional constraints of time and place and allowed individuals to spontaneously negotiate how they will engage with other people, places, and things. Visitor services, as an example, are fundamentally affected by these new technologies as they greatly expand who becomes an informant and influencer, and how frequently and accessible information exchange and other data transactions occur.</p> <p>The potential for tourism applications is almost limitless. The planning sessions identified apps for coordinating transportation services, enhancing BC Ferries schedules, and improving both trails information and interpretation, and accommodation bookings to provide new experiences and ways of engagement for both visitors and businesses. The portable concierge concept is gaining ground as travellers use their devices not just to dream, research, and book, but to experience and share as well. The question is: are we offering up useful information to travellers that helps enhance their trip and advance their perceptions of the destination and the brand? In many cases, such as finding and accessing transportation services locally, the answer is a qualified no.</p> <p>Given the wide array of potential opportunities, knowing where to start app development can be challenging. A suggested model is the successful Agritech Innovation Challenge sponsored by the BC Innovation Council. The Council outlined four challenges, allocated \$20,000 for each and provided mentorship assistance to the winning bidders.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Develop a tourism technology strategy for Vancouver Island that would prioritise development efforts. The strategy would bring together the research on trends and best practices and would provide recommendations on which functions offer the greatest potential benefit to the South Central Island and which specific opportunities might be brought forward. • Work with the BC Innovation Council to explore the feasibility of a Tourismtech Innovation Challenge similar to the Agritech Innovation Challenge. <p>SUCCESS NETWORK TVI, British Columbia Innovation Council, Innovation Island, service providers, information content providers, DataBC, BC Centre for Data Innovation</p>	2. LONGER TERM ACTIONS
	PROVINCIAL SCOPE

THEME 4: ACTIONS	PRIORITY
<p>19. CHAMPIONING TOURISM TECHNOLOGIES: The smartphone app is only a small subset of the much broader discussion that concerns integrating new technology into the tourism industry. An example is the use of drone technology and what it could mean for tourism development on the South Central Island. Drones can do more than provide the panoramic shots for promotional videos — examples include streaming live event coverage, monitoring trails washouts, and providing public health and safety services, such as locating lost automobiles in large parking lots.</p> <p>The University of Victoria's Centre for Aerospace Research is a world leader in drone technologies. There could be opportunities for a strategic partnership to access research and development capacity for tourism applications. Parksville Qualicum Beach is working with technology partners on a mobile attractions and savings pass. There may be other similar tourism partners, especially businesses, interested in a funding and participating in these opportunities.</p> <p>A major challenge in adopting technology by the tourism industry is in identifying the right technology for a given business, community, or destination. The exponential change in technology in some service areas such as Online Travel Agencies can often seem a world away from a rural tourism operator who lacks the knowledge, tools, strategy and funds to consider it in the first place.</p> <p>Given the gap between technology potential and actual adoption, destination management organizations can play a highly useful role in researching, brokering, educating, and promoting the uptake of technology solutions by tourism business and community organizations.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Promote and leverage Destination BC initiatives such as Remarkable Experiences, Google Trekker, and CrowdRiff for innovations in product and experience development. • Promote use of best practices in technology and tourism using resources made available by the United Nations World Trade Organization and other industry associations. • Identify local examples of innovative use of technology in tourism, which can then be showcased to industry and communities. • Examine the opportunities for the technology resources of local government for use in tourism. For example, local government has expanding GIS capabilities and at the same time is responsible for managing urban and remote trail systems for both residents and visitors. Consider whether this technology can be leveraged to enhance visitor services and create more integrated and interesting experiences. A specific best practices guide could be assembled and distributed to local government to encourage discussion and identify potential projects. • Consider a technology news section of the TVI corporate website. • Consider a tourism technology forum that would bring together local businesses from the two industries for the express purpose of identifying opportunities for technology transfer and adoption. • Investigate Smart Tourism Destination concepts and whether they would have application in the study area. <p>SUCCESS NETWORK DBC, TVI, British Columbia Innovation Council, Innovation Island, technology and research providers, educational institutions, local government, chambers of commerce</p>	1. QUICK WINS
	REGIONAL SCOPE

THEME 5: Human Resources

OBJECTIVES

- Enhanced labour supply
- Increased uptake of education, training, and accreditation programs
- Retention of existing businesses through succession planning

THEME 5: ACTIONS	PRIORITY
<p>20. PROFESSIONAL DEVELOPMENT AND ACCREDITATION: Professional accreditation, certification, and training programs by accommodation facilities and other tourism operators are key to increasing market and export-ready product. Such an emphasis will also improve the financial sustainability of businesses, and will give operators additional tools for being competitive and innovative.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Encourage the uptake of existing national and provincial resources, such as those offered by go2hr, Tourism HR Canada, and other human resource service providers. • Promote the certifications for the tourism industry, and work with provincial agencies for the delivery of training tools and professional certification services. • Work with local educational institutions on tourism skills programs. • Promote eco-friendly business practices to operators as a competitive strategy for reinforcing the region's brand image and encourage operators to achieve certification from accrediting organizations. <p>SUCCESS NETWORK Community Futures corporations, local economic development offices, Business Development Corporation, Ministry of Agriculture, Ministry of Tourism, Arts and Culture, Ministry of Indigenous Relations and Reconciliation, Coastal Community Futures/Venture Connect, TVI</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	PROVINCIAL SCOPE
<p>21. BUSINESS SUCCESSION AND RETENTION: One of the risks for communities outside major urban centres is that of business closures for lack of succession planning. Business succession planning is not an uncommon priority for rural and smaller urban centres who are becoming more proactive about working with business on succession planning opportunities.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Promote BC tools for succession planning, for example the Ministry of Agriculture's Business Succession guide and resources available through the BC Small Business Accord. • Work with economic development agencies and partners to promote succession planning. • Work with secondary and post-secondary programs to identify succession and apprenticeship synergies. <p>SUCCESS NETWORK Community Futures corporations, local economic development offices, Business Development Corporation, Ministry of Agriculture, Ministry of Tourism, Arts and Culture, Ministry of Indigenous Relations and Reconciliation, Coastal Community Futures/Venture Connect, TVI</p>	2. LONGER TERM ACTIONS
	PROVINCIAL SCOPE

THEME 5: ACTIONS	PRIORITY
<p>22. TOURISM WORKER ATTRACTION AND RETENTION: Recruitment, hiring, and retention are a critical operational function for small tourism businesses, but one that most are not well equipped to excel at. This is exacerbated by the relatively small local labour pool (outside of Nanaimo) and the high number of retirees that has reduced the labour market participation rate. The lack of housing and transportation options are factors that further complicate the issues relating to human resources. New and enhanced initiatives, such as the partnership between Parksville Qualicum Beach and go2hr to target baby boomer and/or older worker recruitment at local job fairs, are needed.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Maximize uptake and use of Labour Market Development Agreements and their associated programs such as the Canada-BC Job grant and First Host. • Facilitate a more efficient labour market in the planning area by promoting: <ul style="list-style-type: none"> - career, education, and training opportunities to resident workers - employer resources from human resource agencies - best practice research on the most effective recruitment strategies - more flexible access to temporary foreign workers <p>SUCCESS NETWORK go2hr, ITBC, Tourism HR Canada, Career Centres, Services Canada, industry associations, education providers, Ministry of Labour, Ministry of Indigenous Relations and Reconciliation, Ministry of Citizens Services, TVI</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	PROVINCIAL SCOPE

THEME 6: PRODUCT DEVELOPMENT

OBJECTIVES

- Expanded year-round, market-ready tourism products and services
- Informed, competitive and innovative tourism operators
- Sustainable experiences integrated into local communities and culture

THEME 6: ACTIONS	PRIORITY
<p>23. PACKAGING AND ITINERARIES: Packaging can refer to the offering of multiple trip components such as flights, accommodation, car rental, event tickets, and local guided tours, but in the context of this strategy it refers to a grouping of local products and services into a single purchase. Packaging is something discussed in almost every local tourism plan prepared over the last decade, including the Experience the Gulf Islands Concept Plan (2016), the Nanaimo Region Tourism Strategic Plan (2013) and the Cowichan Region Tourism Plan (2010). It not only increases market reach for the participating operators, but also improves ease and convenience for visitors. The market interest in packaged experiences and itineraries is highlighted in EQ segmentation research, with a number of segments showing a preference for packaged offerings. The development of these packaged experiences is likely to encourage new demand, with such visitors becoming increasingly active as influencers through social media channels.</p> <p>Despite ample online resources illustrating how tourism packaging can be implemented, it remains the exception rather than the rule for most operators.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Prepare an inventory, by sub-region, of products and experiences that could be packaged and identify the market and export readiness factor for each. (catalyst project) • Identify operators and other stakeholders to work with, and develop partnerships, and packaging opportunities. • Compile and promote themed itineraries that can then be used to recruit participating operators who are both market and export ready. The itineraries should be developed on two dimensions: themes that utilize regional strengths, for example marine, trail, agritourism, Indigenous culture, and small communities; and, products and packages that meet the known preferences of primary EQ segments. • Promote market and export ready criteria to operators expressing interest in itinerary participation. • Encourage more products and experiences in the shoulder seasons to diversify seasonality. <p>SUCCESS NETWORK Tourism operators, Destination BC, TVI</p>	2. LONGER TERM ACTIONS
	REGIONAL SCOPE

THEME 6: ACTIONS	PRIORITY
<p>24. INDIGENOUS EXPERIENCES: The one visitor experience that is frequently cited as difficult to engage when visiting the South Central Island planning area is Indigenous culture. Although there is a growing roster of Indigenous tourism businesses, they are not well integrated into existing packages and lack the leverage needed to motivate trip decisions. The BC Indigenous Business Listings maintained by the Ministry of Jobs, Trade and Technology show the region as having a heavy concentration of Indigenous businesses with strong clusters in Port Alberni, Nanaimo, and the Cowichan Valley. Systemic issues around support for tourism can be mixed as it is in any community, yet some bands have made great strides in building their tourism operations. One of the greatest needs is development of entrepreneurship.</p> <p>Many Indigenous people have been involved in various segments of the eco-tourism industry, but may lack the capital, marketing or management expertise to run their own business. Better access to on-the-ground training and resources could unlock further potential for authentic Indigenous experiences.</p> <p>Another area of need is a better understanding of market preferences, and how these can be built into products and services. For example, Cultural Explorers and Authentic Experiencers, two primary EQ segments for the planning area, are both inclined to outdoor adventure and cultural interpretation, something that Indigenous tourism operators have the opportunity to provide in distinct ways.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Establish an Indigenous Tourism Committee that would focus on policy development and programming for product and service development. • Engage First Nations on how to build a stronger success network, and increase participation in tourism planning across all levels. • Using the Vancouver Island Regional Aboriginal Tourism Strategy (2014) as a baseline, identify, in cooperation with ITBC, short term initiatives for creating market-ready experiences. • Investigate an Indigenous mentorship program in which small tourism operators can gain access to the experience and expertise of mainstream tourism businesses. A mentorship program can make a significant impact, as has been demonstrated on the mainland coast with the growth of the Homalco Band's bear viewing operation following mentor assistance. The regional ITBC strategy for 2014 identifies opportunities and gaps but it does not indicate how these might be moved forward. A mentorship program would provide direct enterprise facilitation services that are lacking for First Nations entrepreneurs. • Evaluate existing packaging efforts (e.g., ITBC's Whales, Bears, Cities, and First Nations Culture, Tourism Association of Vancouver Island's Cultural, and Creative Coast) and recommend improvements based on EQ profile preferences. <p>SUCCESS NETWORK Indigenous Tourism BC, First Nations communities, Nuw-chah-nulth Economic Development Corporation, Ministry of Indigenous Relations and Reconciliation, TVI, Island Coastal Economic Trust, Community Futures corporations, tourism operators</p>	1. QUICK WINS
	REGIONAL SCOPE
<p>25. MARINE TOURISM: Marine tourism features heavily in the marketing of Vancouver Island as a visitor destination. The marine playground experience is special within the BC context and certain components like the Pacific Rim, are internationally significant. A number of products, like coastal cruising and sailing, are very well established, as are destinations like Barkley Sound for paddling. However, many barriers to development remain particularly on the boating side, and specifically in relation to accessing services in marinas and small harbours.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Prepare a marine tourism strategy that addresses integration of the visitor offering, capturing more relevant marine visitor data, better understanding of EQ as it applies to marine products, and customer service training. With a more focused approach to developing the marine experience, visitors are likely to increase their recommendations for the planning area as a marine destination. • Conduct outreach with marinas and other marine infrastructure providers on the importance of visitor markets and the need for adaptive policies to meet their travel needs. <p>SUCCESS NETWORK TVI, Island Coastal Economic Alliance, Destination BC, local paddling and boating clubs, industry associations, marine tourism operators, local DMOs, local economic development offices</p>	1. QUICK WINS
	REGIONAL SCOPE

THEME 6: ACTIONS

PRIORITY

1. QUICK WINS

26. FOOD TOURISM: The South Central Island has one of the province's prime agritourism regions, centred in the Cowichan Valley and the Southern Gulf Islands. There is also growth potential in the Alberni Valley. Parksville Qualicum Beach has embarked on a food tourism initiative starting with a Growers Guide visioning workshop. While the region may never have the critical mass or competitive advantages to compete in mainstream agricultural commodity production, it does possess a large number of small-scale, cottage producers who are drawn by the favourable climatic and soil conditions. The region has an excellent reputation in key visitor markets both domestic and abroad. The connection between small scale food production and agritourism is a close one. The added employment and income potential can help sustain small farm viability, increase the economic stability of rural communities, and provide a vital link between local food, food security, and the visitor experience.

ACTIONS

- Promote food tourism as a viable value-added niche to local producers.
- Identify new experiences that appeal to visitors already attracted by the existing agritourism products.
- Expand regional self-guide farm and producer tours. The highly successful Circle Farm Tours on the mainland and in Pemberton and the equally popular Economusee British Columbia are best practices.
- Provide follow-up assistance to Cowichan producers who participated in the 2016 Remarkable Experiences program.
- Promote the farm to table concept connecting local producers with visitors through the culinary industry, farmers markets and farm gate initiatives.

SUCCESS NETWORK TVI, BC Association of Farmers Markets, Culinary Tourism Society BC, Investment Agriculture Foundation, Ministry of Agriculture, Ministry of Tourism, Arts and Culture, Ministry of Indigenous Relations and Reconciliation, producers

27. NATURE-BASED TOURISM: Vancouver Island's reputation as one of the world's premiere island destinations is attributable in large part to its natural features, and the range of outdoor recreation activities available including hiking, mountain biking, cycle touring, caving, bear and whale watching, surfing, windsurfing, paddling, boating, sailing, diving, fishing, and general nature observation.

Destination differentiators such as a diverse but navigable coastline, accessible mountain areas, high quality and accessible wildlife viewing opportunities, and a rich collection of national, provincial, and regional parks have encouraged a relatively strong base of eco-tourism businesses, including many owned and operated by First Nations. The range of products varies from affordable and accessible family vacations to some of the world's most exclusive eco-adventures.

There is still unrealized potential to further develop nature-based products based on the revealed interest level of key visitor markets. Nine of the 15 activities with the highest interest level among BC's EQ targets have to do with the natural environment. The South Central Island has the natural resources to support more visitor experiences and an increase in demand, but still falls short of enough market-ready products that would make for a truly competitive cluster.

More enterprises like the Amazing Places program, a partnership between Destination BC, Mount Arrowsmith Biosphere, and Parksville Qualicum Beach, are needed.

ACTIONS

- Promote the development of backcountry outdoor recreation opportunities, and encourage greater operator uptake of Crown tenures as provided in the provincial Adventure Tourism Policy.
- Monitor the provincial land and resource management process and continue to advocate for tourism interests. Resource roads policies, visual quality objectives, and resource extraction activities continue to have potentially adverse effects on tourism values. This could be undertaken through the Inter-Agency Management Model proposed in the Planning and Collaboration section.
- Prepare a short strategy paper on the importance of national and provincial parks to the visitor experience and the need for increased funding for park-related infrastructure (including campgrounds) and interpretation. For the provincial context the paper can integrate into BC Parks' Future Strategy by identifying sustainable funding options, potential nominations for UNESCO sites, new campsites, accessible facilities, marine trails, back-country cabins, hut-to-hut circuits, mountain biking circuits, and enhanced electrification and servicing options.
- Examine the creation of an aquarium and/or animal refuge cluster that connects the high levels of market interest with the Island's exceptional wildlife and marine-life resources. The Free Spirits represent a major target for South Central Vancouver Island and they have very high interest levels in visiting zoos and aquariums. Facilities like the Bamfield Marine Science Centre, Ucluelet Aquarium, North Island Wildlife Refuge, Mountaineer Avian Rescue Society, and other similar facilities could develop into a region-wide visitor product.

SUCCESS NETWORK TVI, tourism operators, Island Coastal Economic Trust, recreation groups, Wilderness Tourism Association, FLNR, Ministry of Tourism, Arts and Culture, BC Parks (Parks Advisory Committee), Parks Canada

1. QUICK WINS

PROVINCIAL SCOPE

THEME 6: ACTIONS	PRIORITY
<p>28. TOURISM BUSINESS RETENTION AND EXPANSION (BRE) PROGRAM: The objective of a Business Retention and Expansion (BRE) program is to improve understanding of the driving forces of economic change and help businesses be more competitive. By establishing and strengthening its relationship with businesses, the planning area will be in a better position to match its policies and destination development efforts to improve the business climate.</p> <p>The program would be built around a visitation program and focused on the involvement and support of targeted tourism partners.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Create a tourism business visitation program, the purpose of which would be to retain and expand the number of market-ready experiences. A BRE program is meant to highlight current trends, opportunities, and red flags as they affect tourism development. Operators would be surveyed as part of a six-month pilot of visitation and outreach, data collection, and aftercare. The Economic Development Association of BC has BRE program resources. • Develop an aftercare service focusing operators who have participated in the Remarkable Experiences program. • Work with local economic development offices and DMOs for their support and participation in the program. <p>SUCCESS NETWORK Local economic development offices, tourism operators, Island Coastal Economic Trust, Community Futures corporations, TVI</p>	3. SET ASIDE UNTIL RESOURCES ALLOW
	PROVINCIAL SCOPE
<p>29. RESEARCH SERVICES: Product development in the region is hampered by difficulties in accessing two types of information: market data, particularly visitor volumes, activities, and spending habits; and, industry and tourism resource data that is available in map format.</p> <p>Tourism Vancouver Island has been on the leading edge of market research with a focus on local and regional markets. Outside of Destination BC's regional profiles, visitor activity metrics are still hard to come by. Similarly, industry and resource information is plentiful but for most tourism operator's awareness, access, and use can be challenging.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Implement Destination BC's value of tourism model for the region. • Develop a tourism dashboard on the TVI website for reporting key national, provincial, and local indicators. <ul style="list-style-type: none"> - Incorporate business pulse insights from the BRE program - Incorporate highlights from TVI's consumer research • Investigate a pilot project in cooperation with DataBC that would take advantage of the provincial government's Open Data Initiative to utilize government and other public datasets into an online reporting and planning tool. This could greatly facilitate industry communications and give operators a hands-on tool for investigating new product development. • Expand the use of EQ research for destination and product development. It is believed the EQ resource is under-utilized for product and experience planning. <p>SUCCESS NETWORK TVI, Community DMOs, Visitor Centres, accommodators, DataBC, Destination BC, Vancouver Island University</p>	2. LONGER TERM ACTIONS
	REGIONAL SCOPE

IMPLEMENTATION FRAMEWORK

TOFINO
Photo: Adrian Dorst

A. CATALYST PROJECTS

The following eight actions were identified as top priority catalyst projects for immediately moving the South Central Island Destination Development Strategy into implementation:

THEME	CATALYST PROJECTS
PLANNING AND COLLABORATION	<p>Effective, collaborative, and cross-regional planning focused on sustainable destination development and aligned with local aspirations.</p> <p>CATALYST PROJECTS</p> <ul style="list-style-type: none"> • Inter-Agency management model • Tourism sustainability plan and handbook • Indigenous tourism specialist
TOURISM INFRASTRUCTURE	<p>Strategic, prioritized, and leveraged public and private investment in tourism infrastructure for unrestricted movement within the destination area supporting community livability and vibrancy and creating lasting, memorable visitor experiences.</p> <p>CATALYST PROJECTS</p> <ul style="list-style-type: none"> • Divestiture Program policy response
INTEGRATED, MULTI-USE TRAIL SYSTEM	<p>Exceptional outdoor adventure and island-coastal lifestyle through unique, interconnected green and marine-ways with expanded, upgraded, and usable trail network.</p> <p>CATALYST PROJECTS</p> <ul style="list-style-type: none"> • Five priority trail projects • Accessible Vancouver Island guide • Salish Sea Marine Trail



THEME	CATALYST PROJECTS
TECHNOLOGY INNOVATION	Upgrading telecommunications capacity and modernizing visitor information services to capitalize on the new services, greater convenience, and new ways of engagement that rapid innovations in technologies are providing – leverage new market opportunities.
HUMAN RESOURCES	A quality and mobile workforce, supported by labour marketing intelligence and training excellence to excel at personalized and authentic visitor experiences.
PRODUCT DEVELOPMENT	Availability of year-round, quality tourism experiences, extending destination comparative advantages to support a vibrant, healthy tourism economy and increase competitiveness. CATALYST PROJECTS <ul style="list-style-type: none">• Export-ready product inventory

B. PROVINCIAL AND REGIONAL PRIORITIES

A key deliverable of the Destination Development Program is the creation of regional and provincial strategies. Objectives and actions that are shared commonly across the Vancouver Island tourism region may become regional priorities. And, at the very least, will inform the creation of a Regional Destination Development Strategy.

This South Central Island Destination Development Strategy, together with the other 19 strategies from around the province, will inform the creation of a Provincial Destination Development Strategy.

Objectives identified as provincial in scope may involve multiple provincial organizations, including Destination BC, ITBC, go2HR, TAC, and TIABC.

^awww2.gov.bc.ca/assets/gov/careers/about-the-bc-public-service/diversity-inclusion-respect/accessibility2024_update_web.pdf

It is recommended that the following South Central Island actions become provincial initiatives within the Provincial Destination Development Strategy:

- A provincial inter-agency management committee would bring some cohesion and consistency to the tourism planning table, so that all partners understand that organizations making decisions are at the very least participating in the discussions about implementation.
- The provincial government should develop a tourism destination development handbook that shows how access to different tourism inputs such as land and resources, labour, infrastructure, and capital are managed, and how destinations can more effectively engage with the province. The handbook would assemble and collate existing information into a convenient and user-friendly guide. Tourism is not like other trade-based industries; it is small business-based, multi-sector, highly fragmented, and characterized by a community-as-product dimension that does not exist in any other area of the economy. A handbook would guide communities and entrepreneurs on how to strategically engage the provincial government on tourism planning.
- Improve community and regional access to government data and planning tools as part of the provincial government's various Open Data initiatives.
- Amend legislation for local government to explicitly address tourism in official community plans and regional growth strategy planning.
- Increase provincial funding support for Indigenous Tourism BC and increase ITBC's regional extension services and program support for Indigenous product development (particularly on Vancouver Island).
- Negotiate a data-sharing agreement between the provincial government and BC Ferries for access to scheduling information and other corporation services in digital formats suitable for future app development by communities and the region.
- Support provincial agency involvement in the preparation and execution of a Vancouver Island transportation plan.
- Prepare a provincial tourism action plan linked to Accessibility 2024.
- Increased funding for Rec Sites and Trails BC to undertake capital improvements in recreation sites and trails.



C. FUNDING PROGRAMS

To assist planning areas such as the South Central Island in their implementation efforts, Destination BC has compiled a list of funding programs as part of its Provincial Situation Analysis.

The different funding options highlighted include: Municipal and Regional District Tax (MRDT), Destination BC Programs, Western Economic Diversification Canada (WD), Ministry of Transportation and Infrastructure Programs, Community Gaming Grants, BC Parks Foundation, Community Trusts, Resort Municipality Initiative (RMI), Municipal Funding, and Business Levies.

Contact Destination BC for a copy of this information sheet.

The provincial government also has an online tool on their website to find economic development funding and grants.

10

MEASURING AND MONITORING SUCCESS

Ultimately, the overall objective of this strategy is to guide the growth of the South Central Island's tourism sector in an economically, socially, and environmentally sustainable manner over the next 10 years.

The following recommended measurements can be used to monitor the success of the tourism industry in the South Central Island, and the implementation of this strategy.

GOALS	INDICATORS	SOURCES
1. DISTINCTIVE EXPERIENCES A go-to destination for our EQ targets built on an exceptional combination of natural, built, and cultural experiences.	<ul style="list-style-type: none"> • Overnight stays • MRDT receipts • Tourism businesses (#) • Tourism employment (#) 	DBC Publications: <ul style="list-style-type: none"> • Tourism Indicators • Regional Profile • Value of Tourism
2. SUSTAINABLE DEVELOPMENT Widespread use of sustainability principles by local government, operators, and community partners.	<ul style="list-style-type: none"> • Local plans with sustainability content • Operators with sustainability programs • Partnered sustainability initiatives 	<ul style="list-style-type: none"> • Internal research • Surveys
3. NEW APPROACH TO BUSINESS A dynamic planning environment that embraces change through productive partnerships, strategic infrastructure priorities, and effective management practices.	<ul style="list-style-type: none"> • Tourism output • New partnerships • New infrastructure 	<ul style="list-style-type: none"> • Value of Tourism • Regional Profile • Internal research • Surveys

APPENDIX

APPENDIX 1: OVERVIEW OF PLANNING PROCESS

The following planning process ensured this strategy was developed thoughtfully and with consistent participation from a diverse group of industry partners that impact tourism either directly or indirectly. The process followed a semi-structured design by Destination BC that was customized specifically for the South Central Island.

1. SESSION 1 — Kick-off Meeting on July 21, 2016 in Tofino and Nanaimo

- a. Attended by 76 participants, including 17 connecting remotely.
- b. Introduced the program, engaged tourism partners, and began to gather information to understand the context of the destination.

2. REVIEW of planning area reports, strategies, and plans, as well as other information, e.g., websites.

3. SESSION 2 — working sessions with representative tourism partners on October 18, 2016 in Tofino, October 19, 2016 in Nanaimo, and October 20, 2016 in Saanich for the Southern Gulf Islands tourism partners.

- a. Attended by 46 participants.
- b. Reviewed the operating context and captured participants' input on constraints and opportunities.

4. TOURISM partner interviews

- a. Individual and group interviews were held with 18 stakeholders and were conducted to clarify destination development issues, constraints, and opportunities.

5. SESSION 3 — Vision Creation

on December 6, 2016 for the Southern Gulf Islands (Mayne Island, Galiano Island, and Salt Spring Island), December 7, 2016 in Nanaimo, and December 8, 2016 in Ucluelet.

- a. Attended by 60 participants.
- b. Reviewed the planning considerations, discussed shared vision and goals, and identified destination development themes.

6. SESSION 4 — Working Committee in-person meeting on January 23, 2017 in Nanaimo.

- a. The smaller working group continued to draft the strategy and provide recommendations.

7. DESTINATION AUDIT ASSESSMENT TOOL in April and May 2017

- a. Completed by 48 stakeholders in the South Central Island planning area.
- b. The Destination Audit Assessment tool was designed to assist with the overall assessment of a destination from a number of different supply-oriented perspectives, which means that it focused primarily on the resources, assets, infrastructure, and policies that make a destination competitive, rather than the marketing of the destination and related roles of destination marketing organizations.

8. COMPLETED the South Central Island Situation Analysis.

9. DRAFTED and finalized the South Central Island Destination Development Strategy.

11. PLANNING area participants were invited to provide feedback on the draft strategy

APPENDIX 2: PLANNING CONSIDERATIONS

This section summarizes the planning context and provides the key directions the South Central Island Destination Development Strategy should address.

SUPPLY-RELATED FACTORS

On the basis of the desk research and the consultation process, the following planning considerations were identified for the South Central Island.

1. Environmental capacity

The constraints to growth and the need to develop tourism in a sustainable manner were consistent themes in the workshop discussions. The combination of a range of physical constraints, and a coastal environment with limited capacity for growth without significant environmental or social/cultural impacts were clearly identified. In particular, the following factors were highlighted:

- Highway 4 — unsuited to high volumes (a challenging drive, but part of the experience).

- Narrow roads on the Southern Gulf Islands.
- Limited water supply and health services (Tofino and the islands).
- Limited availability of land (in Southern Gulf Islands).
- The philosophical position of the Islands Trust.

The accommodation capacity (fixed roof and camp sites) is a further constraint to ongoing growth on the west coast during the peak season.

While public awareness programs (e.g., the District of Tofino's new water conservation strategy and the successful actions taken in 2015 to reduce peak season water consumption) may assist in managing visitor impact to some degree, it remains clear that the destination development strategy for the planning area must recognise the constraints to growth and the need to manage demand within a framework of sustainability.

2. Marine policies

Marine policy issues were seen as significant areas of concern in all workshops. These issues include:

- Water leases on the foreshore — there are a range of problems relating to navigating the process and working through the various federal, provincial, and municipal layers.
- Outdated small craft harbour regulations — particularly where the fishing sector is no longer significant or even present, and tourism has become the prevalent use.
- Concerns regarding the way in which the federal government is seeking to divest responsibilities.
- Insufficient marina facilities and dock space for small vessels.
- Insufficient number of access points to the marine environment and the need for access to be more visitor facing.
- Derelict vessels.
- The ongoing growth of tanker traffic and the extent to which adverse impacts on tourism are ignored.

3. Trails development

The planning area recognises the importance of trail infrastructure and the benefits to be gained from developing new trail-related experiences, and enhancing Vancouver Island's positioning as a destination offering world class trails. Considerable work has been undertaken to raise the profile of trails in the Vancouver Island region through both strategic planning initiatives, such as the development of the Hiking Tourism Master Plan, and a series of development projects.

These include:

- The Vancouver Island Spine Trail initiative.
- The proposed Pacific Traverse Trail connecting Tofino and Ucluelet through Pacific Rim National Park Reserve.
- The "5440 Peak West Ridge Hut" project which will strengthen alpine summer and winter activities.
- The near-completed trail along the E&N from Parksville to Coombs (part of a much larger initiative that will result in a 290 km bike and pedestrian trail from Victoria to Port Alberni and Courtenay).
- The significant emphasis on trails throughout the Southern Gulf Islands and the CRD Regional Trails Plan for the islands.

Moving forward, the development of a strong trails network will still have to deal with a number of localised constraints.

These include:

- Gaining access over private lands to remote lakes and improving the west coast hiking experience.
- The need for more wayfinding and interpretive signage.
- Concerns regarding applying mainland trails standards to the Gulf Islands, where meeting such standards is considered as either too challenging or unnecessary given the anticipated usage.

4. Transportation

The nature and level of access to a destination and within a destination are key parameters in the competitiveness of a destination. The importance of good transportation linkages in the development of tourism, and in a region's ability to spread its benefits, becomes particularly pronounced when island destinations are being considered. It is therefore not surprising that concerns relating to transportation are prevalent in the planning area.

The issues identified are as follows:

- Challenging road access to the west coast with insufficient rest areas. At the same time it is recognised that Highway 4 contributes to the overall visitor experience; and, that it acts as a natural constraint to excessive growth.
- Highway signage is not sufficiently clear for visitors in places.
- Concerns regarding the vulnerability of road access to and from the west coast, and the possibility of being cut off in the event of a significant incident. The recent collapse of part of the road structure accentuates this concern.
- RV parking issues in Tofino.
- Inadequate connectivity between airports and community destinations through limited transit and taxi services, and insufficient car rental options.
- The lack of transit options for visitors and the virtual absence of public transportation services in some areas, such as between Tofino and Ucluelet and in many parts of the Southern Gulf Islands.
- Insufficient safe opportunities for cycling.
- A limited ability to island hop between the islands.
- Excessive ferry waits for BC Ferries in peak season.
- Insufficient air services in the off-season, and limited market awareness of many existing services.

These concerns are well understood, and various initiatives are being pursued to alleviate them, and to enhance the competitiveness of the planning area from a transportation perspective.

The following projects and proposals were highlighted in the planning discussions:

- The provincial government is launching engineering works for Highway 4 corridor upgrades and safety improvements following a review of the Highway 4 Horne Lake Connector business case, which concluded that an alternative route between Port Alberni and Highway 19 is not financially feasible. These upgrades will include safety improvements at Cathedral Grove.
- The Regional District of Nanaimo is exploring opportunities to work with BC Transit to improve transit connectivity with Cowichan Valley and Comox Valley.
- The Lady Rose marine group is proposing a car ferry service from Port Alberni to Bamfield and Ucluelet. Lady Rose marine group recently purchased MV Tenaka from BC Ferries — a vessel that accommodates 24 vehicles and 100 passengers.
- \$1.27m investment was assigned to Long Beach Airport in 2015 through the new BC Air Access Program. The installation of runway lighting allows for fixed-wing aircraft to make night landings. This project is complemented by the airport's work on a new global positioning system that will assist navigation in inclement weather. Plans to rename the airport — likely to be Tofino Regional Airport — will also help in raising the profile of the airport and increasing market awareness of this air service.
- The runway expansion and lighting project at the Alberni Valley Regional Airport is nearing completion. (The \$1.1m lighting component was partially funded the the BC Air Access Program.) While the benefits of this project are essentially commercial and relate to the aerospace sector, the improvements provide an alternate to the Tofino-Long Beach Airport when the operation of the latter is constrained by weather-related issues.
- A foot ferry service between downtown Nanaimo and downtown Vancouver has been proposed and the decision relating to the successful operator is imminent.
- Significant discussions, feasibility analyses, and the implementation of pilot transportation projects have taken place within the Southern Gulf Islands. Pender and Mayne Islands each have a volunteer bus service, and one is set to commence on Galiano — as pilot projects.

5. Technology

As technology becomes an increasingly important factor in the competitiveness of a destination and in the delivery of visitor services, issues associated with it become more apparent.

Within the planning area these include:

- Insufficient availability of wi-fi within the overall planning area.
- Under-utilised potential of new fibre optic infrastructure.

6. Planning and collaboration

While there has been considerable emphasis on planning, this has generally been limited to discrete community areas and there has been a lack of coordination between planning areas. The regional trails work and the inter-island planning initiatives are exceptions.

Other concerns relate to:

- The need for a more inclusive approach to planning and collaboration, not only across planning areas but with a wider spectrum of stakeholders — particularly First Nations. The development of First Nations destination experiences is progressing. However, a more integrated approach will enhance potential synergies and strengthen emerging opportunities.

7. Labour resources

The delivery of quality visitor experiences is highly dependent on front-line staff. Ensuring that there are sufficient staffing levels and consistent customer service are both key factors to consider in destination planning.

Within the planning area there are concerns in relation to these two factors and these are compounded by:

- Seasonal issues and problems with staff retention, which in turn gives rise to shortages.
- A lack of adequate and affordable accommodation for tourism staff.

- Issues associated with hydro-service interruptions.
- Insufficient use of technology in the delivery of visitor services and experience: for example, in relation to way-finding on trails and the communication of stories, and within many of the community visitor centres.
- A skills gap is becoming more apparent as the use of technology increases.

- The importance of strengthening the tourism voice in developing official community plans.
- Uncertainty around non-treaty lands, and the need for greater clarity over crown land negotiations.
- The absence of integrated emergency preparedness programs for the planning area.
- Inconsistent regulations — for example, relating to short and longer-term rentals, and business licensing.
- A general weak understanding of how the tourism system works, and the potential for new types of partnerships.
- The need to ensure that the Southern Gulf Islands are recognized as rural communities and are eligible for related funding opportunities.

- An aging population to draw from, and a declining volunteer base.
- A shift in the type of skills required, as noted under technology, and concerns with the out-migration of younger and newly qualified individuals.
- Insufficient understanding of the role of customer service across all touch-points with the visitor, and how it can undermine the experience.

THE VISITOR / DESTINATION EXPERIENCE

The combination of these supply-related factors have an impact on the overall experience. Looking more specifically at the experiences on offer, the following areas of concern and/or need were also highlighted:

- A gap between the marketing of many experiences and the ability to deliver on the ground.
- Insufficient wet-weather options, particularly on the west coast, and the associated costs of developing new infrastructure on a limited resident tax base.
- An insufficient opportunity to experience First Nations culture and a general need to have a greater understanding of local cultural and environmental stories as a basis of building stronger experiences.
- Issues with operating pop-up businesses could potentially be reducing the appeal of local communities. Concerns regarding the aesthetics of downtown core areas (for example: empty storefronts and derelict buildings) may be further diminishing the experience.
- Seasonal and Sunday closures.
- Inadequate capacity in place for the delivery of appropriate experiences for the cruiseship sector.
- Limited cooperation between businesses that could work together to strengthen the shoulder seasons. The insufficient sharing of information and a lack of a clustered approach appear to contribute to this.
- The need for training in developing and delivering guided experiences and in customer service.
- The need to provide visitors with a better understanding of the geography of the planning area — in terms of distance, time required to travel from one community to another, natural hazards, and cultural protocols.
- An inadequate appreciation of the importance of tourism to the local economy, and a sense of community resistance to the development of tourism.

While these factors may have a detrimental impact on tourism in areas, there is also considerable evidence of initiatives that are enhancing the overall experience and appeal of planning area. Examples include:

- Within the Port Alberni area there are a number of products: the Clutesi Haven Marina project; the First Nations maple syrup initiative; the extension of the Tri-Conic Challenge in 2017; and, the new micro breweries — both in Port Alberni and Ucluelet.
- On the west coast the Huu-ay-aht First Nation have purchased 11 properties in Bamfield with operating businesses and plans to continue developing marine and ecotourism. The Ucluelet First Nations tree-top experience will further diversify the product offering.
- Waterfront masterplanning processes currently underway in Parksville and Qualicum Beach.
- The further development of Ladysmith Harbour as a destination with the Indigenous canoe carving program and the proposed floating campground.

