Destination British Columbia™

COMMUNITY TOURISM FOUNDATIONS

VANCOUVER ISLAND NORTH TOURISM PLAN

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Definitions:

Vancouver Island North – refers to the geographic area included in the Regional District of Mount Waddington, including the communities of Alert Bay, Broughton Archipelago, Coal Harbour, Holberg, Nimpkish Valley, Port Alice, Port Hardy, Port McNeill, Quatsino, Sointula, Telegraph Cove, Winter Harbour, and Woss, as well as surrounding wilderness areas within the Regional District of Mount Waddington.

Vancouver Island North Tourism (VINT) – destination marketing for Vancouver Island North is under the responsibility of VINT, a project of the Regional District of Mount Waddington.

Vancouver Island North Tourism Advisory Committee (VINTAC) – an advisory committee of the Regional District of Mount Waddington. The VINTAC membership are volunteers that represent tourism stakeholders, First Nations, strategic appointments by sector or geographic area, municipalities and the Regional District.

PLEASE NOTE:

Please note this is a community-wide tourism plan, and there are initiatives within the plan that are the responsibility of many organizations and businesses to implement. As such, this plan is not intended to be solely the responsibility of Vancouver Island North Tourism (VINT) to implement. There are many identified actions in this plan that are outside of the scope of VINT's mandate and resource capabilities.

Executive Summary

The Vancouver Island North Tourism Plan summarizes the results of a one-day *Community Tourism Foundations* (CTF) workshop on March 31, 2015 involving tourism stakeholders from all municipalities and rural electoral areas within the Regional District of Mount Waddington (RDMW). The plan represents the communities of Alert Bay, Broughton Archipelago, Coal Harbour, Holberg, Nimpkish Valley, Port Alice, Port Hardy, Port McNeill, Quatsino, Sointula, Telegraph Cove, Winter Harbour, Woss, and Zeballos, as well as surrounding wilderness areas within the Regional District of Mount Waddington.

This community-wide plan, under ownership of all communities and tourism stakeholders in the region, presents an overview of the destination, a vision for the destination, and opportunities, challenges and priority activities that could be implemented over the next one to two years. The Vancouver Island North Tourism Plan is based on information that was provided by Vancouver Island North Tourism (VINT) in the CTF Expression of Interest, existing plans (including previous CTF Tourism Plans, among others), research reports, and input from stakeholders during the one-day workshop in addition to supplemental research and analysis conducted by the facilitator.

Overall, Vancouver Island North has made significant achievements since the first CTF Tourism Plan in 2008, establishing a strong organization for leading tourism marketing, establishing a distinct brand and implementing both marketing and development initiatives. Moving forward, this plan evolves the marketing initiatives to continue to create awareness, desire and conversion of a trip to the region, as well as creates a stronger focus on developing the destination in a way that meets customer expectations and creates more memorable and remarkable experiences.

Vision and Mission

The current Vision and Mission were considered still relevant by workshop participants:

> Vision: Vancouver Island North is recognized as a world-class tourism destination.
>
> Mission: To increase the benefits to the Vancouver Island North region through tourism.

Goals

Workshop participants considered the VINT Goals to still be relevant to the region and recommended adding Goal #4 below:

> Goal 1: To increase tourism revenues to the Vancouver Island North Region.
>
> Goal 2: To increase the awareness of the impact of tourism in the Vancouver Island North region.
>
> Goal 3: To improve tourism product quality to a level that meets consumer demand.

Goal 4: To increase the number of new tourism products and experiences.

Goal 5: To increase the awareness of Vancouver Island North's natural and cultural assets.

Goal 6: To be a financially sustainable and unified organization.

Priority Activities

1. Continue to support and enhance the role of VINT, and maintain efforts to strengthen the partnership-based approach to supporting the growth and development of tourism.

2. Build capacity in the region for a champion to take the lead role in working with partners in implementing Destination Development initiatives.

3. Continue to engage stakeholders and residents through communications and community relations activities to contribute to an enhanced tourism development climate.

4. Increase the focus on understanding and protecting cultural tourism experiences and wilderness natural assets of the region.

5. Evolve and enhance marketing efforts to complement the current focus on generating awareness and interest with a stronger focus on conversion for booking a trip to Vancouver Island North.

6. Provide more compelling and enticing packaged travel experiences within the destination and between destinations.

7. Leverage existing and new marketing partnerships and programs for tourism growth.

8. Create more product experiences and improve the quality of current experiences to meet consumer demand.

9. Continue efforts on industry education and professional development.

10. Continue to build tourism industry knowledge, insight and research that will provide the information needed to execute this plan, as well as provide critical information for business decisions and planning in the future.

11. Continue to evolve visitor servicing to meet visitor expectations and influence trip planning behaviour.

12. Determine the requirements for the next long-term comprehensive tourism plan.

1 Introduction and Methodology

Destination BC offers the *Community Tourism Foundations* (CTF) program to provide resources to communities to assist in tourism planning, with the overall objective of strengthening the tourism industry and increasing tourism's value to the overall economy.

Vancouver Island North has a strong history of tourism planning, with a full CTF Regional Tourism Plan developed in 2008, a CTF Tourism Plan Update in 2011, as well as three-year Business Plans developed starting in 2012. Since then, there have been changes in the operating environment, and much has been accomplished in the plans. In addition, a Strategic Sectors Study for the Mount Waddington Regional District was developed that included tourism as a key sector. As such, Vancouver Island North Tourism (VINT) contacted Destination BC to participate in the CTF program to reengage stakeholders to develop a new Tourism Plan.

This Vancouver Island North Tourism Plan, under ownership of all communities and all tourism stakeholders in the region, summarizes the results of a one-day CTF workshop involving tourism stakeholders from the region as well as a review of the previous plans and current environment. It presents an overview of the destination, a vision for the destination, and opportunities, challenges, and priority activities that could be implemented over the next two to three years.

The Vancouver Island North Tourism Plan is based on information provided by the community in the CTF Expression of Interest, existing plans, and research reports relevant to the Vancouver Island region, and input from stakeholders during the one-day workshop, in addition to supplemental research and analysis conducted by the facilitator.

The strategy that follows is intended to serve as a guide for community-wide stakeholders as they proceed with implementation. It should be reviewed and updated by the stakeholders as necessary to reflect changing tourism objectives, priorities and market conditions. Also, results should be tracked regularly such that an updated strategy, with learning from the current year's activities, can be even more effective in increasing benefits to the community.

For more information on Vancouver Island North's Tourism Planning History, see Appendix 1, which includes an overview on the progress of the initiatives within the 2008 Tourism Plan as well as the 2011 Regional Tourism Plan Update, as well as an overview of the 2013 Business Planning review and the Strategic Sectors Study.

Workshop Participants

The meeting was attended by 32 people, including Jody Young and Dave Petryk from Tourism Vancouver Island. Susan Rybar facilitated the workshop on behalf of Destination BC. The participants from Vancouver Island North were:

Contact	Business Name
Andrew Jones	Kingfisher Wilderness Adventures
Angela Smith	Port Hardy Chamber of Commerce and Visitor Information Centre
Brodie Wilson	North Island Secondary School student
Carrie Davis	Quarterdeck Inn
Cheryl Jorgenson	Port McNeill & District Chamber of Commerce and Visitor Centre
Christine Martin	Village of Port Alice Councillor
Craig Murray	Nimmo Bay Resort
David Mitchell	Community Futures Mount Waddington
David Wall	Strategic Natural Resource Consultants Inc
Della Green	U'mista Cultural Centre
Donna Gault	Tourism Port Hardy
Graham Macdonald	Town of Port McNeill
Greg Muirhead	Tourism and Outdoor Education Program Port McNeill High School
Jan Allen	Village of Port Alice Mayor
Jeannine McCormack	Quatse Salmon Stewardship Centre
John Tidbury	District of Port Hardy Councillor
Joli White	Vancouver Island North - Tourism Coordinator
Karen Stewart	At Water's Edge B&B
Leslie Taylor-Child	Kawat'si Economic Development Corporation KEDC LP
Lillian Hunt	U'mista Cultural Centre
Luke Lessard	Blackfish Adventures
Madeline McDonald	CAO, Village of Port Alice
Pat English	RDMW - Economic Development Manager
Rick Marcotte	District of Port Hardy Councillor
Robin Smith	Malcolm Island Inn
Roger McDonell	Stubbs Island Whale Watching
Scott Mercs	Cluxewe Resort
Stephanie Rockman	Sointula Resource Centre
Wendy White	Village of Alert Bay Councillor

2 Situation Analysis

2.1 Key Insights

The following key insights were developed based on the Situation Analysis, which is provided in full in Appendix 2 – Operating Environment, and Appendix 3 – Visitor Analysis.

Overall, the tourism sector is seeing positive growth globally, in Canada and in BC, with projections for continued positive growth.

The digital shift to mobile and social media continues to increase in importance for travel planning and engagement in the destination. It will be critical for VINT to participate fully in the digital space to maximize opportunities to generate awareness, interest and conversion.

The increasing interest in seeking out memorable, authentic experiences, growing environmental concern, and the appeal of nature (in an increasingly urban world) are all trends that could help the appeal of Vancouver Island North as a travel destination.

Consumers are becoming more sophisticated travellers, with a corresponding increase in the expectations of quality service delivery. As such, Vancouver Island North needs to continually improve the quality of the tourism product offering.

The strongest market for Vancouver Island North has been identified as Vancouver Island and Other BC residents, following by Europe and Alberta.

Visitors to BC and Vancouver Island region are motivated by and participate in the types of experiences and activities that Vancouver Island North has to offer. In particular, nature (e.g., parks) and outdoor activities (e.g., wildlife viewing, fishing, hiking) are key drivers.

A review of the available research reveals a need for more information about visitors to Vancouver Island North specifically. Upcoming consumer research will assist with evolving marketing plans and decision making.

Vancouver Island North has momentum built in both the outdoor recreation and cultural tourism markets. There is opportunity to continue to grow these markets.

As tourism becomes more competitive globally, destinations are increasingly looking to the development of strong brands and unique product experiences to differentiate themselves and entice new visitors. In order to increase its competitive position as a destination, a stronger focus on destination development may be required for the region.

There are significant shifts related to Destination BC's new Corporate Strategy that may impact the destination development and marketing opportunities for Vancouver Island North. These may include increases in resources to support destination development, support for the development of Remarkable Experiences, and a need to align to a new destination tourism brand.

2.2 VIN Local Context

Vancouver Island North encompasses the area within the Regional District of Mount Waddington (RDMW), which includes the northern third of Vancouver Island and a large area of the adjacent mainland, including Knight Inlet and a swath of the Great Bear Rainforest.

The regional district represents 1% of the population of Vancouver Island. According to the Strategic Sectors Study, the population of the RDMW has seen a significant decrease (~20%) since 1996, but has remained steady in recent years and is projected to increase in the coming decades.[1]

The planning vision for the regional district is "The Regional District of Mount Waddington will continue to be economically oriented to resource use and extraction, with increasing emphasis in managing resources for long-term ecological, economic and social sustainability. New opportunities in tourism, services and small business will help diversify the economy. There will be limited growth in population and most new housing and related community services will be located in the various municipalities and rural settlements of the RDMW."[2]

Tourism is one of the five strategic economies identified to assist with economic diversification within the region. This focus on economic diversification represents a significant opportunity for tourism as resources and funding are available to continue to support both destination development and marketing of the destination.

Tourism appeared to be showing signs of growth in Vancouver Island North to 2013, with a decrease in 2014. Performance indicators of the growth of tourism include:

- The Municipal and Regional District Tax (MRDT) regional room revenue collection saw increases from 2011 to 2013, but decreased in 2014 slightly below the 2011 level[3]. However, 2013 was an anomaly as there were two large industrial projects in the region that inflated the room revenues but were one-time increases opposed to a trend. MRDT is collected at 49 properties representing 897 units in all MRDT eligible municipal and rural properties.
    - Increase of 3% from 2011-2012
    - Increase of 7% from 2012-2013
    - Decrease of -11% from 2013-2014
- The 2014 VINT Stakeholder Feedback End of Year Survey[4] showed 60% of operators reported the same or an increase in number of guests in 2014 compared to 2013. The 2013 survey reported 30% who had decreases over 2012. Similarly, in 2014, 59% reported the same or an

[1] Strategic Sectors Study Mount Waddington Regional District January 2015
[2] Regional District Mount Waddington Planning Vision, http://www.rdmw.bc.ca/regional-services/planning/
[3] VINT MRDT Collection to 2014, based on VINT receiving 80% of MRDT collected within region
[4] Results should be used with caution due to small sample size and low response rate.

increase in revenues. This compares to 27% who reported a decrease in revenues in 2013 over 2012. [5]

Growth was curtailed, however, due to the loss of the BC Ferries "Discovery Coast" Route 40 (Port Hardy to Bella Coola direct sailing) and service reductions on "Inside Passage" Route 10 (Port Hardy to Prince Rupert), both of which negatively impacted the 2014 season. The Discovery Coast Tourism Impact Analysis reported an economic impact of $1,027,432 for the North Island from the Discovery Coast route based on 2013 ferry passenger traffic for that route.[6] The loss of that route has greatly impacted some stakeholders.

One operator reported that the cancellation of the Discovery Coast Ferry and the reduced sailings for the Inside Passage (in seven weeks of the year) resulted in decreased tour bus traffic and FIT travel from Europe, particular for the early and late season. Other operators noted a decrease in European visitation and an increase in US visitors, which may be attributed to the stronger US economy, low exchange rate and low gas prices.[7]

According to the Strategy Sector Study, vehicle and passenger traffic on all routes in the RDMW has declined over 15% from 2009 to 2013 (Figure 1).[8]

Figure 1: BC Ferries Passengers and Vehicles, 2009-2013

Route	2009		2013	
	Vehicles	Passengers	Vehicles	Passengers
Route 10 (Port Hardy - Bella Bella - Prince Rupert)	13552	42802	11253	36082
Route 25 (Alert Bay - Sointula - Port McNeill	91181	247093	78302	215006
Route 40 (Port Hardy - Mid Coast)	2451	7718	2126	6678
Total Traffic	107184	297613	91681	257766
% Change in Vehicle Traffic (2009-2013)	**-17%**			
% Change in Passenger Traffic (2009-2013)	**-15%**			

Source: Strategic Sectors Study Mount Washington Regional District, January 2015

General discussion on the local trends and product experiences for Vancouver Island North during the March, 2015 workshop included the following comments from participants:

- Visitor spending has increased for activities. This has not been seen for accommodation.
- RV traffic has increased significantly.

[5] VINT Stakeholder Feedback Results, 2013 and 2014
[6] Discovery Coast Tourism Economic Impact Analysis, January 2014, TIABC
[7] 2014 VINT Stakeholder Feedback End of Year Survey
[8] Strategic Sectors Study Mount Waddington Regional District January 2015

- Boating registration has increased in Port McNeill. The marina has also seen an increase in volume.
- The Alert Bay Art Gallery has seen significant increases in visitation.
- Visitation and spend by visitors from Alberta has decreased.
- Accommodation overnight stays decreased in 2014 due the completion of a few large construction projects in 2013.
- Reduction in scheduled bus service – IslandLink Bus will not be operating in 2015.
- Customers purchasing packaged deals are now staying longer, looking for two-three day packages as opposed to one-two day packages.
- Travel agents are packaging the area more, with more innovative packages.
- More online media are highlighting the area, e.g., bloggers, online magazines.

2.3 VIN Visitor Motivations & Statistics

A review of the available research reveals a need for more information about visitors to Vancouver Island North.

Fortunately, a new regional Visitor Experience Survey that includes Vancouver Island North, Campbell River and Comox Valley will collect visitor information including demographics, travel patterns, daily spending, satisfaction measures, and use of travel-planning resources. The final report is expected to be complete in October, 2015 and will be used to develop regional visitor profiles, along with a visitor database.

Upon completion of the regional visitor profile, this Tourism Plan should be reviewed and updated based on findings from the survey.

The following information is specific to the Vancouver Island North region. For more information on visitors to Vancouver Island in general, see Appendix 3.

Visitor Awareness and Desire

In 2014, VINT participated in an omnibus survey[9] that measured the awareness and desire of Vancouver Island North as a place for a leisure trip, including measuring awareness and desire of the nature-based tourism, wildlife viewing and cultural tourism experiences.

[9] Survey research conducted by Oraclepoll Research Ltd. This was a 400-person survey report has a margin of error of +/- 4.9% 19/20 times. The survey was conducted between the days of January 20th and January 30th, 2014. BC panelists were recruited randomly by phone and then participated in an online panel.

Overall, Vancouver Island North has high levels of awareness and desire for all factors surveyed, which indicates a viable strategy may be to increase focus on converting the awareness and desire to an actual purchase (Figure 2).

Figure 2: Awareness and Desire of Vancouver Island North, 2014

"Do you think of the Vancouver Island North Region, which is shaded in on the map, as a place for…?"	**Yes (2014)**	**Yes (2015)**
An overnight leisure trip	78%	80%
Nature based tourism such as hiking or kayaking	76%	78%
Cultural tourism experiences such as cultural centres or cultural performances	75%	75%
Wildlife viewing experiences such as bear watching or whale watching	73%	71%

"Using a scale from 1 being not at all desirable to 5 being very desirable please rate how desirable you consider the Vancouver Island North Region, which is shared in on the map as being a place for . . . "	**Yes (2014)**	**Yes (2015)**
An overnight leisure trip	83%	91%
Nature based tourism such as hiking or kayaking	73%	86%
Cultural tourism experiences such as cultural centres or cultural performances	72%	82%
Wildlife viewing experiences such as bear watching or whale watching	74%	79%

Source: VINT 2014 Omnibus Survey

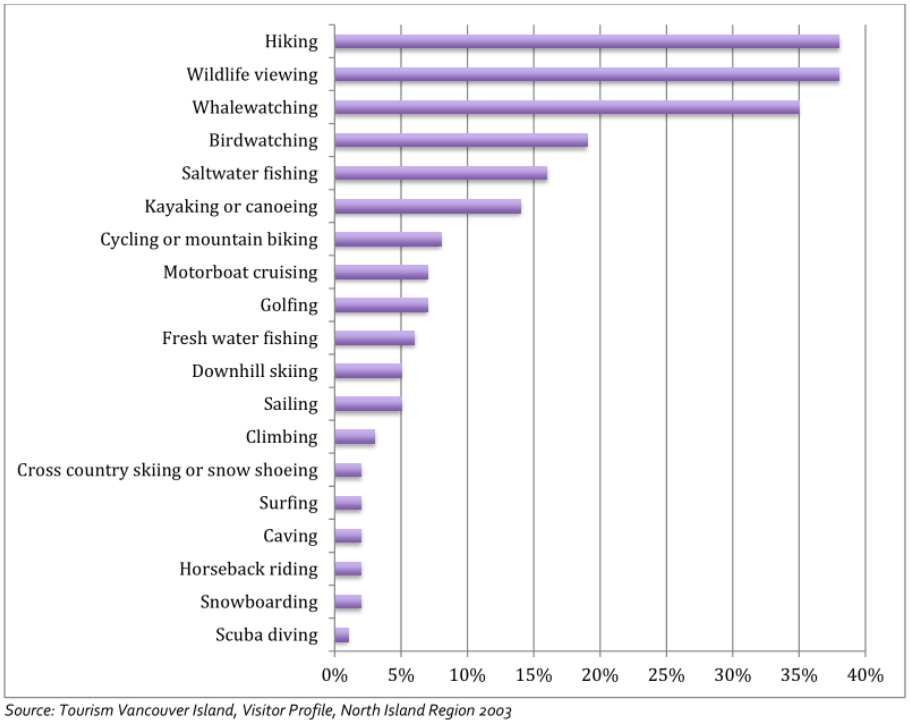
Visitor Motivations

Currently, tourism in the area is predominantly driven by consumer motivations for nature-based tourism including sport fishing, kayaking, pleasure boating, SCUBA diving, whale watching, and wildlife viewing (Figure 3), as well as cultural tourism experiences.[10] Many visitors also come to the area in order

[10] Strategic Sectors Study Mount Waddington Regional District January 2015

to take BC Ferry Routes further north, in particular the Inside Passage route from Port Hardy to Prince Rupert.

Figure 3: Vancouver Island North Visitor Activities



Source: Strategic Sectors Study Mount Waddington Regional District January 2015

Other motivating factors discussed during the March, 2015 workshop include:

- The "Blackfish effect" of more people looking to see wildlife in the wild, and are therefore interested in visiting Vancouver Island North for a more natural experience than an aquarium or zoo.
- The attraction of Cape Scott Provincial Park and the North Coast trail continues to increase in popularity as a destination hike, with over 5% growth seen year over year.

Alternative /Competitive Destinations

During the March, 2015 workshop, participants noted the destinations with similar product offerings that visitors could consider instead of Vancouver Island North:

- Tofino/Ucluelet
- Mount Washington
- Campbell River
- Whistler
- Sunshine Coast

- Haida Gwaii
- Prince Rupert

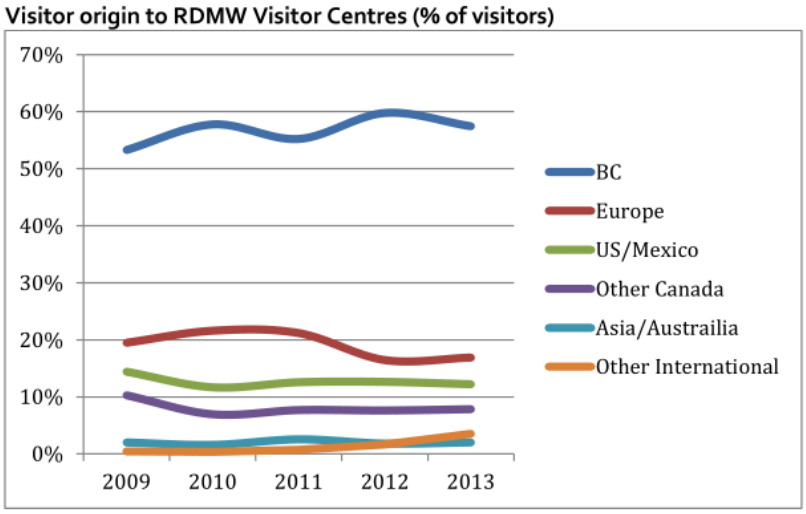
In addition to these BC destinations, other alternative/competitive locations identified include Newfoundland, Seattle, Alaska, and New Zealand.

Market of Origin

Visitors to the Vancouver Island North Visitor Centres predominantly come from other areas within BC, followed by Europe, US/Mexico and Other Canada (Figure 4).

Note: this information should be used with caution as by no means does visitors to the Visitor Centres represent the visitor profile in its entirety. Of particular note is the percentage of visitors from Europe, which is different than the province as a whole, where European visitors account for only 2.8% of visitor volume.[11]

Figure 4: Visitor Centre Visitors - Market of Origin



Source: Visitor Centre Data Courtesy of North Island Tourism

Source: Strategic Sectors Study Mount Waddington Regional District January 2015

2.4 Product and Service Update

The following new product and service update information was compiled during the March, 2015 workshop as well as through information provided in the CTF Expression of Interest.

[11] The Value of Tourism in British Columbia 2015, Destination BC

New Products/Service

- Woss 113 Locomotive Heritage Park.
- Return of the Hornsby Steam Crawler to Coal Harbour
- Port McNeill Harbour Development
- Port Alice Public Marina
- Coal Harbour History Museum
- Seawolf Adventures / Mike Willie – aboriginal and cultural tours, water taxi
- Nakwakto rapids tour – aboriginal and culture product, including new tour to traditional territory
- Port Hardy Inn – new ownership by the k'awat'si Economic Development Corporation
- Port Hardy Commuter Trail
- Interpretive signs in Port Hardy – seven new signs
- Increase in humpbacks whales
- Telegraph trail
- Quatse trail maintenance
- Woss Lookout Heritage Site & Trail – fire lookout restored for 2015
- Investment and installation of fibre-optic cable - improved capacity, enhanced quality of and expanded high-speed service to residents and businesses, including coastal communities

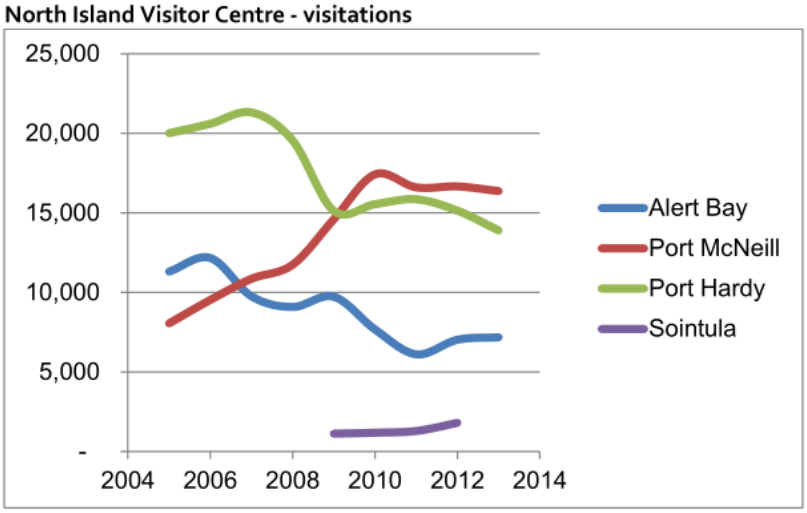
2.5 Visitor Services

There are four Visitor Centres and one visitor resource centre in Vancouver Island North, all operated locally:

- Port Hardy Visitor Centre
- Port McNeill Visitor Centre
- Alert Bay Visitor Centre
- Port Alice Visitor and Heritage Centre
- Sointula Resource Centre

Combined, over the last five years, these centres have served on average between 39,300 and 44,000 visitors annually, with Port McNeill increasing in visitation and Port Hardy and Alert Bay both seeing decreases (Figure 5).

Figure 5: North Island Visitor Centre Visitation, 2004-2013



Source: Visitor Centre Data from Vancouver Island North Tourism and Destination BC

Source: Strategic Sectors Study Mount Waddington Regional District January 2015

Visitor Centres are promoted through wayfinding signage, travel guides and online. All locations offer basic visitor servicing (maps, directions, and suggestions on what to see and do). Also, many businesses provide visitor information in the form of maps, brochures and guides, including accommodations, car rental, airport, ferry terminal, coffee shops, activity operators, grocery stores and others.

As part of its new Corporate Strategy, Destination BC is currently reviewing its Visitor Servicing program, including the Visitor Centre Network program which provides funding and leaderships to Visitor Centres. As such, there may be changes to the provincial program that impacts the Vancouver Island North Visitor Centres and visitor servicing strategies. A review of this Tourism Plan will be required once the new Destination BC direction is confirmed.

2.6 Tourism Management

Currently, there is not one organization responsible for all aspects of tourism management for Vancouver Island North, including destination development and marketing. Strategic direction and marketing is under the responsibility of Vancouver Island North Tourism (VINT), which was established in 2009 to focus on the promotion of tourism as a region. VINT is a project of the Regional District of Mount Waddington and is managed by a contractor, Tourism Vancouver Island, who was recently awarded a new 4-year contract in conjunction with the recent 5-year MRDT renewal.

The marketing and business plans for VINT are guided by the Vancouver Island North Tourism Advisory Committee (VINTAC), an advisory committee of the RDMW. The VINTAC membership are volunteers

that represent tourism stakeholders, First Nations, strategic appointments by sector or geographic area, municipalities and the Regional District.

The VINT delivery model was reviewed by Tourism Vancouver Island in the fall of 2011, and again by a sub-committee of VINTAC in the fall of 2013. After both reviews, the decision was made to remain as a project of the RDMW with contracted management from Tourism Vancouver Island.

The 2013 review also resulted in a change to the tourism structure, which allowed for additional stakeholder positions that provided a stronger stakeholder focus.

Currently, the RDMW has initiated a Corporate Review of the VINTAC. The Corporate Review will:

- Look at the bigger picture of this Tourism Plan as well as stakeholder feedback and determine if changes are needed in the organizational structure to better enable tourism in the region.
- Review the actions developed in the RDMW's Strategic Sectors Study, which may impact the role of VINT and VINTAC.
- Consider the changes coming at the provincial level to tourism in BC (e.g., Destination BC, Tourism Vancouver Island), and revisit the organization to better prepare and position VINTAC for the new structure.

Overall, according to stakeholders at the March, 2015 meeting, the governance model works well, is productive and enables industry to drive the efforts of VINTAC. However some concerns were raised, including:

- Perceived by some stakeholders that Port Hardy has a limited number of seats on the Advisory Committee and therefore isn't fairly represented based on the community's wider range of stakeholders and accommodations compared to other communities/areas in the region. This may translate into a lack of engagement for those who feel they are not well represented.
- There are some that feel that VINTAC should be completely made up of tourism businesses/operators, whereas there are others that believe having government at the table brings them in to help with making their decision and support for tourism.

In addition to the role of VINT, tourism initiatives are implemented by the RDMW Economic Development, as well as other municipal organizations, and tourism partners.

2.7 Tourism Funding

VINT is funded through multiple sources, including MRDT (80% of MRDT collected in region), stakeholder investment into marketing programs, Destination BC and contributions from the RDMW.

In 2012, the 2% MRDT funding was renewed for Port Hardy, and in 2014, the renewal process was successful for the rest of the region. In total, 2015 revenues were budgeted at $246,370.[12]

- 2015 Operating Budget: $246,370
    - 2% MRDT $120,210
    - Stakeholder investment $78,545
    - Destination BC $37,200
    - RDMW $10,415

On February 17, 2015, the provincial government announced its 2015 Budget, including the increase of the maximum MRDT rate from 2% to 3%, which will go into effect on September 1, 2015.[13] For Vancouver Island North, an extra 1% could create approximately an additional $60,000 in revenues.

To increase the rate, participating municipalities, regional districts and eligible entities will have to apply, and a tax rate increase will only take effect after an application has been approved by the Provincial Government.

Participants of the March, 2015 workshop discussed the potential of applying for the extra 1%, and agreed to discuss the opportunity, and review the pros and cons, once the provincial guidelines are available later this year.

In addition to ongoing revenues noted above, tourism initiatives are funded through multiple other one-time sources, including Island Coastal Economic Trust (ICET), which provides grant funding for Economic Infrastructure and Economic Development Readiness, and Coastal Sustainability Trust (CST).

As the budget for the Priority Actions outlined within this plan may exceed the total annual budget available from VINT, new revenue streams or other resources may need to be sourced.

2.8 Tourism Partnerships

There are multiple organizations that work on tourism development and marketing initiatives, including:

- VINT
- RDMW, municipalities, towns, villages, rural electoral areas
- First Nations
- Chamber of Commerce
- Visitor Centres

[12] VINT 2015-2017 Strategic Business Plan
[13] http://www.sbr.gov.bc.ca/documents_library/bulletins/pst_120.pdf

- Community Futures Mount Waddington
- BC Ferries
- Tourism Vancouver Island
- Destination BC
- Aboriginal Tourism Association British Columbia
- Park Facility Operator - Strategic Natural Resource Consultants Inc
- Wilderness Tourism Association (WTA)
- Vancouver Island North Film Commission

Destination British Columbia

As an industry-led Crown corporation, Destination BC works collaboratively with tourism stakeholders across the province in coordinating marketing at the international, provincial, regional and local levels. Destination BC has been mandated to fulfill several key marketing and leadership responsibilities critical to the long-term, sustainable growth of the provincial tourism industry.

Over the next three years, Destination BC will be focused on three important goals for growth, as identified within their new Corporate Strategy[14]:

- Secure the highest Net Promoter Score in North America
- Lead Canada in growth of overnight visitor expenditures
- Build a collaborative, insight-driven, results-focused team

A few key Destination BC initiatives that may impact Vancouver Island North include:

- Launch of BC's new tourism brand creative and guidelines.[15]
- Launch of a new provincial Co-operative Marketing Program, which will replace the current Tourism Partners, Community Tourism Opportunities and Experiences BC programs. The new program will be an application-based program of which VINT can apply directly to Destination BC for funding.
- Launch of the new Remarkable Experiences program, of which Vancouver Island North has been selected for a pilot project working with wildlife viewing operators and supporting businesses (e.g. accommodation, food and beverage, transportation). The goals of the program are to support businesses over a period of time to: improve their digital and social media marketing skills; increase their Net Promoter Score (see Appendix 4), and enhance the visitor experience of each individual business, but also the collective experience between the businesses.

[14] Our Corporate Strategy, Destination BC: http://www.destinationbc.ca/cmspages/getfile.aspx?guid=55651809-3ab6-4f0e-ba36-9bffb8de7ef9

[15] New brand guidelines are available: http://www.destinationbc.ca/getattachment/Resources/british-columbia-tourism-brand/Our-Brand.pdf.aspx

- A stronger focus on Destination Development, with potentially a stronger role for the Regional Destination Marketing Organizations leading the planning and execution on the ground for their regions.

As Destination BC continues to implement its new strategic direction, there will be new program opportunities for participation, while some programs may be altered or ceased. The contract with Tourism Vancouver Island is a great partnership that enables VINT to be informed, engaged and aligned to the new provincial strategies.

Tourism Vancouver Island

Tourism Vancouver Island is a destination management organization whose mission is to increase the economic benefits that flow from tourism to the Vancouver Island region. The organization is a non-profit association representing the tourism stakeholders within the Vancouver Island region, which includes all the islands located between Vancouver Island and the mainland coast and also includes coastal areas of the mainland coast between Moses and Bute Inlets.

Tourism Vancouver Island is one of five regional destination marketing organizations (RDMO) in British Columbia that are contracted by Destination BC to deliver marketing initiatives on behalf of the region. As part of this contract, each region administers co-operative marketing programs for their respective region. Through the co-op programs, Tourism Vancouver Island is able to offer tourism stakeholders within the region the opportunity to participate in marketing initiatives at greatly reduced costs. In partnership with tourism stakeholders and Destination BC, Tourism Vancouver Island coordinates over $1.5 million in advertising and promotional campaigns targeted at driving tourism business to the Vancouver Island Region.

The association is governed by a board of directors that is made up of industry professionals from various parts of the Vancouver Island region. The marketing committee meets regularly to evaluate and recommend strategies and tactics that are focused on reaching the vision of the association.

A few key initiatives from Tourism Vancouver Island that may impact VIN include:

- Continuation of the Value of Tourism project to better inform and educate all island residents and stakeholders that tourism is a key economic driver and an important contributor to the quality of life in the Vancouver Island and Sunshine Coast Region.
- Tourism Vancouver Island is currently in discussion with Destination BC on their role in Destination Development, which will inform the role Tourism Vancouver Island may play in Destination Development planning and activation for the region moving forward.
- Translation of the new provincial tourism brand to the Vancouver Island region as a destination. This work will include new “on-brand” asset development such as videos, images and written content.

Aboriginal Tourism Association of British Columbia

The Aboriginal Tourism Association of British Columbia (AtBC) is a non-profit, stakeholder-based organization that is committed to growing and promoting a sustainable, culturally rich Aboriginal tourism industry. AtBC works closely with tourism, business, education and government organizations to help BC's Aboriginal tourism businesses offer quality experiences and actively promotes these experiences to visitors and local residents.[16]

In 2013, AtBC unveiled its 5-year Next Phase 2012-17 strategy. AtBC's five-year strategic targets for success for the Aboriginal cultural tourism industry are:[17]

- Revenue of $68 million (10% growth per year)
- Employment at 4,000 full-time equivalent (10% growth per year)
- 100 Market-Ready Aboriginal cultural tourism businesses (10% growth per year in every region)

Key five-year strategies:

- Push for Market-Readiness
- Build and Strengthen Partnerships
- Focus on Online Marketing
- Focus on Key and Emerging Markets
- Focus on Authenticity and Quality Assurance
- Regional Approach

2.9 Community Attitudes about Tourism

Overall, based on the discussion during the March, 2015 workshop, it is believed there is support from the communities—businesses and residents—for sustainable tourism in Vancouver Island North, and that in general the community is open to development and growth of this sector. The most recent demonstrations of support include the renewal of the MRDT and the identification of tourism in the Strategic Sectors Study.

Port Hardy renewed their MRDT collection agreement in 2012 with 100% of the eligible accommodations signing in support. The joint renewal application for the remaining municipalities and the RDMW electoral areas was submitted in 2014. 100% of Port McNeill accommodators signed on, as

[16] https://www.aboriginalbc.com/about/
[17] The Next Phase – BC's Aboriginal Cultural Tourism Strategy 2012-2017, AtBC

did 80% of Alert Bay accommodators and 54% of the accommodators in the electoral areas of the RDMW representing 67% of the rooms.[18]

However, the North Island economy has long been driven by resource-based industries – logging, fishing, fish farming, mining – and there are concerns about land use management with the potential for conflict—some perceived, some real—between the priorities of these industries and the reliance on tourism on wilderness areas as well.

In addition, it was identified within the March, 2015 workshop that support for tourism doesn't always translate into support or resources for tourism development. In particular, it was believed that education was needed to help the community see the value of tourism, the value of the tourism jobs (and not just low-paying jobs), and understand the connection between investment in tourism and economic gains for the region.

Lastly as a show of support, in the 2014 Mayor/RDMW/Council/Board surveys, the respondents gave a 7.5 out of 10 rating of the importance of the tourism industry to communities. In rating the importance of VINT, the survey participants responded with an 8.6 out of 10 rating of the importance of the tourism industry to communities.[19]

2.10 Marketing Efforts

VINT's 2015 budget for marketing is $142,390, as well as an additional $101,325 for operating and management fees. Marketing activities include:

- Consumer Publications: 62% of budget
  - VIN Visitors Guide and distribution
  - Regional Visitors Map
- Internet: 19% of budget
  - Website
  - Social media
  - Content
  - Online marketing
  - Online guide and map
- Media Advertising: 13% of budget
  - Co-operative ads
  - Kenmore Air
- Trade & Media Relations: 1% of budget
- Research: 4% of budget

[18] VINT CTF Expression of Interest
[19] VINT 2015-2015 Business Plan

- Season Launch Event: 1% of budget

Total traffic on the www.vancouverislandnorth.ca website is up 6.9% over last year to 44,776 sessions, page views up 51% to 122,363, and # of page views per session up 42% to 2.7. Facebook has 5,148 likes. A recent campaign in the UK and Germany have increased the engaged audience in those markets. The Twitter page has 922 followers.

Destination BC

As an industry-led Crown corporation, Destination BC works collaboratively with tourism stakeholders, including VINT, across the province in coordinating marketing at the international, provincial, regional and local levels. Additional activities in 2014/15 from Destination BC and Tourism Vancouver Island that support the VINT marketing efforts include:

- Travel Trade show representation for all communities in the Vancouver Island region included attendance at such Travel Trade shows such as Rendezvous Canada, Canada's West Marketplace, NTA as well as other trade events including supporting Trade familiarization (FAM) tours with key international travel trade operations throughout the region.
- Travel Media representation for all communities in the Vancouver Island region included attendance at travel media showcase events such as GoMedia, Canada Media marketplace among other media events including hosting media dinners in key markets and supporting press trips with key international media writers and producers featuring the region.
- Destination BC promotes Vancouver Island North in consumer publications.
- HelloBC.com "popular area" page as part of the Vancouver Island section: 1,492 page views.
- HelloBC.com travel information profiles for the following:
  - Port McNeill: 18 pages
    - All Port McNeill related pages: 23,415 page views
  - Telegraph Cove: 16 pages
    - All Telegraph Cove related pages: 33,913 page views
  - Alert Bay: 15 pages
    - All Alert Bay related pages: 19,069 page views
  - Port Hardy: 16 pages
    - All Port Hardy related pages: 37,843 page views
- Vancouver Island North is also represented through editorial and listings in three HelloBC.com Driving Routes:
    - BC Ferries Route: 7,124 page views
    - Discovery Coast Circle Route: 9,365 page views
    - Heritage Discovery Circle Route: 3,525 page views
- "Northern Vancouver Island" HelloBC.com Trip Ideas page, featuring a combination of editorial and listings content: 251 page views, live since Sept 2014

2.11 Strengths, Weaknesses, Opportunities and Threats

The following SWOT outlines the strengths, weaknesses, opportunities and threats for Vancouver Island North as a destination. It was developed by the March, 2015 stakeholders with additional inclusions from the CTF Expression of Interest and by the facilitator.

Strengths

- Scenery, pristine nature
- Secluded wilderness beach access
- Often calm ocean conditions on east side of the Island
- Wildlife viewing experiences and predictability of wildlife
- Diversity and proximity to wildlife, including the combination of orcas and grizzlies
- Fishing
- Birding
- World class diving, e.g., shore dive six gills
- Diversity and availability of RV and camping sites, including wilderness camping
- Authentic experiences
- Friendly, informative, welcoming communities
- First Nations culture and strong aboriginal product experiences
- Diverse history of settlers– Finnish heritage, Chinese culture
- Relaxed pace
- Diversity of boating and marine based opportunities (marine highway)
- Variety of hiking options and levels
- Local festivals and events
- Alert Bay 360
- Growth of new products to inventory since 2011
- Strengthened tourism marketing and development
- Growing confidence with stakeholders and communities in the capability of the regional tourism project
- World class operators
- Existing businesses expanding or enhancing their products/facilities
- Canadian Tourism Commission (CTC) Signature Experiences
- Nimmo Bay included in National Geographic Unique Lodges of the World
- MRDT tax funding
- 1,000s kms of unused logging roads

Weaknesses

- Quality of tourism products and service on the North Island
- Some experiences are only accessible via logging roads
- Lack of signage in some areas
- Lack of restaurants and food services
- Lack of accommodation options that are at a high enough standard to accommodate group tours or the mid-value tourist market
- Accommodations capacity in some communities can alternate between near capacity and high levels of vacancies day to day due the BC Ferries' Inside Passage Day Cruise schedule (which leaves every other day)
- Some Aboriginal operators are not considered 'market ready' by AtBC and others
- Lack of vibrant and appealing downtowns
- Level of customer service and hospitality
- Lack of representation on TripAdvisor from Vancouver Island North operators
- Lack of convenient transportation linkages in destination, e.g., to the airport
- Lack of/costs of one way car rentals
- Seasonality is a major limiting factor in employee attraction and retention
- Limited cell phone services
- Lack of strong collaboration and packaging between tourism operators

Opportunities

- Increasing consumer demand for nature-based experiences, including wild, remote experiences
- Learning from aboriginal communities
- Increase public awareness of seeing wildlife in the wild, e.g., Blackfish effect
- Industrial tourism – seeing industry in action
- Access to alpine areas
- Non-forest timber markets – wildcrafting
- The Vancouver Island Spine Trail – a 700-km proposed wilderness trail that will run from tip-to-tip along the spine of Vancouver Island
- Use of existing docks to enhance marine and marine-related products, e.g., fish and chips
- Leverage Destination BC marketing programs
- Leverage increasing consumer use of social media channels and consumer generated content
- Leverage Canadian Tourism Commission (CTC) Explorer Quotient (EQ) program
- The Strategic Sectors Study and subsequent action items for tourism and marine sectors
- Leverage the BC Ocean Boating Tourism plan and initiatives
- Wildlife viewing markets may diversify away from Africa and look for new destinations (due to health concerns in Africa)
- AtBC initiatives to develop and market aboriginal tourism products and experiences

Threats

- Degradation of the environment – air and water
- Loss of fish and wildlife, e.g., orcas don't show up
- BC Ferries loss of service and/or increase in fares
- Growing uncertainty around tenure issues
- International Crisis, such as world security, disease, global economy
- Transportation cuts, e.g., Greyhound terminal
- Oil spill
- Loss of natural resources impacts local economy

3 Strategic Plan

3.1 Vision & Mission

The strategic vision and mission have been previously revised during the VINT planning session in 2013, and were considered still relevant by March, 2015 workshop participants:

Vision

Vancouver Island North is recognized as a world-class tourism destination.

Mission

To increase the benefits to the Vancouver Island North region through tourism.

3.2 Goals

The following are goals identified for VINTAC. Goal #4 has been included based on the March, 2015 stakeholder workshop:

Goal 1: To increase tourism revenues to the Vancouver Island North Region.

Goal 2: To increase the awareness of the impact of tourism in the Vancouver Island North region.

Goal 3: To improve tourism product quality to a level that meets consumer demand.

Goal 4: To increase the number of new tourism products and experiences.

Goal 5: To increase the awareness of Vancouver Island North's natural and cultural assets.

Goal 6: To be a financially sustainable and unified organization.

3.3 Target Market

The primary target markets for Vancouver Island North's Tourism Plan were identified from the VINT plan, as well as from input at the March, 2015 stakeholder workshop, as follows:

Geographic

Primary (70%)

- Vancouver Island & BC

Secondary (20%)

Participants from the March, 2015 workshop requested Europe to move up as a secondary market, with US remaining in the Other section below.

- Europe
- Alberta

Other (10%)

- Washington, Oregon, California, Saskatchewan
- Reverse snowbirds – Texas, Arizona, Montana, Colorado

Note: Recognition of China as an emerging market; opportunities to connect through travel trade, media, and promoting VIN as a destination to friends and relatives already living in BC

Psychographic

Psychographic markets have been identified based on the CTC Explorer Quotients (EQ).[20]

Primary

- Cultural Explorer
- Authentic Experiencer

Secondary

- Free Spirit

Demographic

[20] For more information: http://en-corporate.canada.travel/resources-industry/explorer-quotient

Primary

- Couples/small groups
- 40+ years of age
- $75,000 annual household income
- Post-secondary education

Secondary

- Adventure enthusiasts
- Under 40 years of age

3.4 Priority Initiatives

The following section outlines the priority initiatives to support the identified goals and objectives.

This document is not meant to be an exhaustive list of all activities, but highlights the strategic priorities for the next two to three years. To assist with streamlining the planning documents, identified actions within the 2008 Tourism Plan and 2011 Tourism Plan Update that are still of importance but not fully realized have been incorporated into these Priority Initiatives so that there can be one planning document to reference moving forward. The execution of the tactics is dependent on funding and timing.

1. **Continue to support and enhance the role of VINT, and maintain efforts to strengthen the partnership-based approach to supporting the growth and development of tourism.**

As identified within the 2011 Tourism Plan Update, building Vancouver Island North as a competitive destination and implementing an on-going sustainable growth strategy is ultimately a shared responsibility between local governments and First Nations, tourism operators, Vancouver Island North Tourism and VINTAC, community organizations with a tourism role, and industry partners. Developing a cohesive and effective partnership-based approach to overseeing the direction of tourism growth and ensuring that roles are clearly defined will enhance current momentum and contribute to a greater level of synergy.

In the March, 2015 workshop, participants confirmed the role of VINT has been positive and that a strong emphasis on marketing has shown results – sentiment also articulated in the VINT 2013 and 2014 End of Year Stakeholder Survey. This display of support for the approach to tourism organization has also been evident by the renewing of the MRDT for 5 years and the renewal of the contract with Tourism Vancouver Island for managing VINT. However, there are still areas for improvement to further strengthen the growth and development of tourism.

Actions:

1. Continue to fund and support VINT as the lead tourism marketing DMO for Vancouver Island North, potentially increasing the support to enable the lead tourism organization to increase scope and impact as identified within the Strategic Sectors Study.
2. Complete the VINT Corporate Review to determine if there is a better way to organize the role and efforts of VINTAC to better support the organization's mandate, this Tourism Plan, and tourism growth in the future.
3. Explore applying for the increase in MRDT funding from 2% to 3%, including development of a discussion paper on the pros and cons once the guidelines are available and reviewing the opportunity with industry stakeholders for support, as required.
4. Continue engagement and collaboration between local governments and First Nations, tourism operators, Vancouver Island North Tourism and VINTAC, community organizations with a tourism role, and industry partners to ensure understanding and support of VINT plans and initiatives.

Recommended Lead/Responsible: RDMW

Involved: VINT, Local governments and First Nations, tourism operators, community organizations with a tourism role, and industry partners.

2. Build capacity in the region for a champion to take the lead role in working with partners in implementing destination development initiatives.

While there has been a strong emphasis on marketing through the direction of VINT with proven results, there isn't the same organizational structure, mandate or resources on the destination development side of the destination management equation.

It is critical the mandate for destination development isn't added to the existing role of VINT, or another organization, without adequate resources to ensure the workload doesn't jeopardize current tourism marketing or other critical initiatives of benefit to the region.

Actions:

1. Review the ability to identify and allocate resources to a dedicated champion organization responsible for the oversight and progress of all tourism destination development initiatives.

Recommended Lead/Responsible: Recommended to be initiated by RDMW

Involved: To be determined

3. Continue to engage stakeholders and residents through communications and community relations activities to contribute to an enhanced tourism development climate.

Engagement and communications efforts should be continued for all stakeholders in the region to build support for tourism, keep stakeholders informed about the progress of individual initiatives and overall plans, and encourage stakeholder participation in tourism development and marketing efforts.

This is an ongoing item from the 2011 Tourism Plan Update and articulated within the Strategic Sectors Study. VINT has also identified this as a goal in the 2015-2017 strategic business plan: "To increase the awareness of the impact of tourism in the Vancouver Island North region".

Actions:

1. Continue to communicate with stakeholders through newsletters, events, and information posted on the website, among others.
    - Increase the stakeholder database.
2. Tourism Vancouver Island to continue to educate the residents, communities and all stakeholders on the value of tourism.
    - Create awareness of the value of tourism, including spin-off benefits, e.g., resident's quality of life, boat marine, construction, etc.
    - Explore incorporating tourism education into the K-12 education system.
    - Develop key messaging to address perceptions of low-pay and that tourism only happens in July and August.
3. As identified within the Strategic Sectors Study, "work collaboratively to facilitate and create connections between the tourism sector and other sectors to resolve conflicts and establish reasonable practices by both parties (e.g., logging in areas that impact tourism, fish farm tenures in areas used by recreational boaters and anglers)".

Recommended Lead/Responsible: Tourism Vancouver Island/VINT/RDMW

Involved: Municipalities, tourism operators, go2, AtBC, community organizations with a tourism role, and industry partners.

4. Increase the focus on understanding and protecting cultural tourism experiences and wilderness natural assets of the region.

Vancouver Island North's tourism draw is highly connected to the natural environment and unique culture of the destination. During the March, 2015 workshop stakeholders identified the continued focus on cultural stewardship and protecting and preserving the surrounding natural assets as a key priority for all stakeholders to action.

Actions:

1. Develop a Responsible Travel Destination statement/story that can be used to help educate prospective visitors and residents on what the natural and cultural values of the destination are, what local actions are being taken to protect it, and the conduct expected by visitors while in-destination. Post on the website and have available for industry to share with guests, including what visitors can do to help and support.
2. Identification of, and promotion of standards for industry to adopt that supports being a Responsible Travel Destination. Look for existing industry recognized standards such as Green Key for accommodations[21], or Be Whale Wise for marine wildlife operators[22].
3. Continue to develop closer working partnerships with First Nations and AtBC to build on cultural understanding for both day to day business relationship as well as the cultural aspects of the tourism offering. Support new workshops and communications to assist with industry education.
4. Build appreciation and knowledge with industry employees (e.g., front line, management, owners, operators) to ensure all visitor connections and touchpoints are supporting the Responsible Travel Destination story.
5. Review global best practices and case study destinations for guidance as to what is most effective.
6. Explore garnering recognition for the industry efforts, which will assist in developing pride of place, support the brand proposition, and draw media attention to the collective stewardship achievements of the region. Examples may include Tourism for Tomorrow awards and World Responsible Tourism Awards.
7. Explore the application of significant cultural heritage experiences, e.g., potlatch, for inclusion on the UNESCO Intangible Cultural Heritage Lists.[23]
8. Explore the development of an outreach program that enables local communities and residents to experience first-hand the economic, environmental, and cultural importance of where they live and better understand the importance of stewardship. This could include familiarization tours, webinars, and a series of news articles, amongst others.

Recommended Lead/Responsible: to be determined

Involved: All tourism stakeholders

5. Evolve and enhance marketing efforts to complement the current focus on generating awareness and interest with a stronger focus on conversion for booking a trip to Vancouver Island North.

[21] http://greenkeyglobal.com/
[22] http://www.mersociety.org/blowgoslow.htm#BWW
[23] http://www.unesco.org/culture/ich/index.php?pg=00001

Stakeholders in the March, 2015 meeting expressed a desire to increase the proactive marketing to target markets in advance of their arrival in the destination. As such, VINT should create a promotional mix of marketing activities that continue to raise awareness and desire/interest of Vancouver Island North as a travel destination, with increased efforts on more strongly influencing a decision to visit, and driving conversion in that they entice visitors to book.

The following Actions should be validated as part of the VINT annual planning process.

Actions:

1. Continue to promote a strong activities/sector approach to the marketing messages, including nature-based and wildlife viewing experiences (including fishing, kayaking, hiking, beaches), and cultural tourism experiences (including aboriginal tourism experiences, events).
2. Continue to work with tourism businesses to support alignment of marketing messaging with the Vancouver Island North brand and new provincial tourism brand. Ensure all stakeholders have access to brand platforms and have the tools and guidelines to leverage the brands in their marketing efforts.
3. Continue to leverage the EQ program to identify the most opportune/highest yield traveler for nature-based and wildlife viewing experiences and cultural tourism experiences and incorporate EQ creative intelligence into all marketing campaigns/programs.
4. Leverage the new Destination BC Provincial Co-operative Marketing Program to provide matching marketing funds for VINT initiatives. New program guidelines will be provided by June 30, 2015.
5. Showcase the unique, competitive, and motivating features of the destination to position as a compelling alternative to competing destinations, e.g., Tofino/Ucluelet, Sunshine Coast, Campbell River, Whistler and Prince Rupert.
    a. Tie the Vancouver Island North brand messaging to the Iconic Experiences identified within the Destination BC Corporate Strategy (e.g. Canadian Rockies, Rainforest, Cities in Wilderness, Ocean Coast and Skiing)[24]
6. Work with Tourism Vancouver Island and Destination BC to further support the growth of European markets, Destination BC will lead in long-haul markets.
7. Continue to develop annual communication and content plans for all outgoing communications materials e.g., website, social media, e-newsletters, industry and stakeholder communications, media relations.
8. Continue to develop Integrated Marketing Campaigns to drive short-term and long-term results for the region.
    a. Increase focus on converting the awareness and desire to an actual purchase with an increased focus on marketing in pre-travel stages.

[24] Destination BC Corporate Strategy, Iconic Experiences

b. Review partnering opportunities with Tourism Vancouver Island and Destination BC for maximizing effectiveness while in the decision-making stage.
c. Review the investment in the Travel Guide to identify opportunities to shift a more significant amount of the marketing budget to marketing efforts that generate stronger conversion.
d. Continue to update the Social Media strategy based on changing consumer usage and supporting the Remarkable Experiences pilot program.
    i. Review the social media strategy to align to best in class standards for balance of content for sales messages vs community engagement.
    ii. Create a tone of voice standard to ensure all social media communications are on brand. See *Our Brand* – the guidelines created by Destination BC to align to the provincial tourism brand: http://www.destinationbc.ca/getattachment/Resources/british-columbia-tourism-brand/Our-Brand.pdf.aspx
e. Leverage increasing consumer use of social media channels and consumer generated content.

9. Continue to work with Tourism Vancouver Island, Destination BC and AtBC on Travel Trade and Travel Media Relations activities.
    a. Work to increase the amount of Vancouver Island North product represented in travel trade packages, e.g., Midnight Sun Adventure Travel.
10. Continue to create new assets and communications that supports the content plans of VINT and marketing partners, e.g., Tourism Vancouver Island, Destination BC, AtBC and sector marketing organizations.
    a. Ensure all Destination BC marketing materials accurately reflect the positioning and messaging for Vancouver Island North, including editorial content, photographs, driving routes, trip ideas, blogs.
11. Review the Vancouver Island North presence with Online Travel Agents (OTAs), e.g., Booking.com, Expedia, TripAdvisor, and work with Tourism Vancouver Island and Destination BC to identify opportunities to enhance.

Recommended Lead/Responsible: VINT

Involved: Tourism Vancouver Island, Destination BC, AtBC, All tourism stakeholders in region

6. Provide more compelling and enticing packaged travel experiences within the destination and between destinations.

In order to diversify the market and attract new visitors to the area, new product development is needed. Consumers are looking for unique, memorable, authentic experiences. Efforts should be made to evolve the existing packages offered by businesses and ensure compelling and attractive packages are developed and promoted in a professional way.

Actions:

1. Facilitate workshops and networking opportunities between tourism operators—in particular accommodations, transportation and activities— for the development of partnerships and packaged offers.
2. Explore the consumer appeal and feasibility of developing packages with other destinations, e.g., Tofino to Vancouver Island North packages, Parksville to Vancouver Island North packages. These will both entice visitors north from more popular island destinations, as well as support the destination brand through association.
3. Highlight packaged offerings throughout marketing communications and channels, including the Specials page on vancouverislandnorth.ca and the Travel Deals section on HelloBC.com.

Recommended Lead/Responsible: VINT

Involved: Tourism Vancouver Island, tourism operators

7. Leverage existing and new marketing partnerships and programs for tourism growth.

The success of community destination marketing is to work in partnership with local industry, neighbouring communities and relevant strategic businesses, and improving the linkages between destination marketing organizations at all levels (e.g. structures, resources and strategies).

Actions:

1. Continue to work in alliance, and build upon successful partnerships with community tourism stakeholders (local government) throughout Vancouver Island North.
2. Coordinate a meeting with Destination BC's trade and media department representatives to provide an overview of Vancouver Island North's tourism products and experiences to highlight the destination for Destination BC staff.
3. Continue to leverage partners, and look for new partners that complement the focus areas within the plan, e.g., Arts Connect, Alliance of Arts and Culture/Arts BC, Spirit of the Fraser.
4. Continue to work with sector associations to leverage their provincial marketing efforts and ensure Vancouver Island North is well represented, including providing content they can use (story ideas, images, videos, content). Determine the best way to participate in sector marketing programs once the Destination BC Co-op Marketing Program guidelines are provided to industry by June 30, 2015.
    a. North to Alaska (Drive market, RV and FIT)
    b. BC Boating Association (AHOY BC)
    c. BC RV and Campground Association
    d. Canada's West Ski Area Association

e. Fishing sector marketing organizations, e.g., BC Fishing Resorts and Outfitters Association.
f. BC Marine Trails

5. Continue to work in alliance and build upon successful partnerships with the tourism stakeholders throughout the Vancouver Island North area.
6. Continue to work in partnership with Destination BC and Tourism Vancouver Island.
7. Continue to work with AtBC and local First Nations tourism operators to support the growth of cultural tourism and build stronger relationships with the First Nations communities.
8. Continue to work closely with Comox Valley and Campbell River to encourage a northward and southward distribution of visitors, as identified within the 2011 Tourism Plan Update.
9. Monitor the BC Ferries Vacations promotional programs and explore new opportunities for packaging that include a ferry travel component, if and when their programs evolve in a way that is relevant and appropriate for the Vancouver Island North stakeholders.
10. Explore non-conventional partnerships that may significantly generate greater reach for Vancouver Island North. Examples may include packaged goods (e.g., Hardy Bouys), travel contest prize to Vancouver Island North, local media, local non-tourism businesses (e.g., North Island College, forest industry suppliers), outdoor recreation suppliers, etc.

Recommended Lead/Responsible: VINT

Involved: VINT, tourism operators

8. Create more product experiences and improve the quality of current experiences to meet consumer demand.

Destination Development has been identified as a priority within the 2008 and 2011 CTF Tourism Plans, and although there has been some movement forward on developing the tourism product, it continues to be identified as a priority to develop the destination and enhance the overall experience.

As identified within the 2011 CTF Tourism Plan, there is an insufficient breadth of product to encourage an extended length of stay for different markets. Also identified within that plan, there is a concern that customer service is mediocre and is not a persuasive factor in encouraging an extended length of stay.

To ensure the region offers the products, services and experiences that will entice new visitors to the area, and ensure those visiting in-destination have an experience worthy of sharing and repeating, both individual businesses and the collective industry requires development.

Although this plan is intended to identify initiatives for 1-3 years, it is recognized this is a long-term initiative that can take multiple years. The intent is to start the process, identify resources, develop action plans and begin to move forward. It is not anticipated that all actions would be complete within a short timeframe.

It is important to note that a development program should support the needs of local tourism business operators and organizations, as well as enhance the region as a place to live and work.

Actions:

1. The RDMW and all local governments and First Nations should work to establish conditions for economic growth through tourism, including coming together on land use and tenure agreements.
2. Quality Assurance
    - Provide industry with training on the Vancouver Island North brand strategy and highlight key initiatives operators can implement to support and reinforce the brand through quality improvements.
    - Provide operators with a standards guideline for ensuring the level of visitor service and overall experience supports the brand positioning, marketing and brand promise and expectations of visitors. (It is important to note that Destination BC's Approved Accommodation program will be valid until mid-2016, but is no longer in operation.)
3. Based on input and engagement from both visitors and stakeholders, develop Destination Development Action Plans to identify key concrete steps that can be taken to create more product experiences and improve the appeal and quality of the current product offer. Action Plans should be developed for each of the following:
    - Wildlife Viewing
        - Identified as a unique selling proposition and key motivator for travel to the region.
    - Cultural tourism experiences
        - Identified as a unique selling proposition and a key motivator and trip enhancer for the region.
        - Work with AtBC to assist Aboriginal communities throughout the region in economic development initiatives related to tourism.
    - Accommodation
        - Identified as a priority within the 2008 Tourism Plan, 2011 Tourism Plan update and March, 2015 workshop, both in terms of increasing the quantity of and investment in accommodation, as well as increasing the quality and service levels of existing accommodation.
    - Food and Beverage
        - Identified as a priority in the March, 2015 workshop in particular to meet consumer demand for memorable food experiences while travelling.
        - Increase quality and quantity of food and dining offerings in communities.
        - Support the development of the fish market in Port McNeill through partnerships and promotions.
        - Enhance restaurant product to feature local seafood /fish.

        - Explore working with North Island College Professional Chef's program to develop peak season summer dining options, e.g., food trucks.

    - Events
        - Identified within the Strategic Sectors Study to support an increase in the number and visibility of festivals, particularly those that focus on visits and on existing tourism assets, e.g., trail running, biking, triathlon, cultural events.
        - New funding and resources are available by the province for event hosting: https://news.gov.bc.ca/stories/event-hosting-gets-boost-from-province
    - Trails
        - Identified within the Strategic Sectors Study to upgrade trails and related signage, improve way-finding.
        - Continue to maintain a strategic and select group of market-ready trails.
    - Community Centres and "sense of place"
        - Development of visitor amenity spaces and "town centres" for activation of events and to provide a visually appealing hub for visitors. As identified within the 2011 Tourism Plan Update, a vibrant urban-scape plays a key role in maintaining the health of the industry and in encouraging length of stay, increased visitor spend and increased positive word-of-mouth advertising. This includes waterfront access and community beautification.
4. Continue to place a strong focus on improving transportation options to the region and connecting experiences in-destination, such as connecting between and accessing the Bear Cove Ferry Terminal, Port Hardy Airport, Telegraph Cove, marinas, wildlife tours, kayaking, etc.
    - Facilitate the initial steps for tourism operators and communities and other stakeholders to come together to articulate the transportation gaps and needs, develop goals and identify potential solutions and partners.
    - Collaborate with the Mount Waddington Transportation Committee on potential solutions for a seasonal summer schedule for tourists.
    - Review projects from other destinations that have implemented transportation solutions, e.g., White Rock, Southern Gulf Islands.
5. Work with Community Futures Mount Waddington (CFMW) to promote their services that support business development, including business planning, loans, training, and one-on-one support for entrepreneurs.

Recommended Lead/Responsible: to be determined

Involved: RDMW, VINT, CFMW, tourism operators

9. Continue efforts on industry education and professional development.

The brand promise that is made by marketing Vancouver Island North must be in line with the products and services being offered. As VINT continues to develop tourism opportunities and outreach to key markets, both individual businesses and the collective industry will require development.

Actions:

1. Participate fully in the Destination BC Remarkable Experiences pilot program that will provide tools to help individual businesses both improve their visitor experience and become the best digital marketers they can be. Destination BC will enable their network of partners with a range of skills, tools and delivery models to help create memorable experiences for their guests, to improve experience design and frontline service delivery, to cost effectively manage their online reputation and empower their guests to amplify the message.
    - Upon the completion of the pilot project with the wildlife viewing-related businesses and supporting businesses (estimated timing Oct 2015 - April 2016), evaluate for further opportunities to extend the program to involve more businesses.
2. As identified within the Strategic Sectors Study, support hospitality training and education.
3. Support coordination of and encourage participation in professional development workshops initiated by Tourism Vancouver Island, Aboriginal Tourism BC and Destination BC (locally delivered, webinar or distance education formats):
    - To improve local understanding of actively participating in online and social media marketing by engaging travellers and generating content.
    - To improve skillsets in Product Packaging.
    - To improve understanding of cultural tourism experiences and aboriginal tourism development.
    - Host workshops focused on providing an exceptional visitor experience, including *WorldHost*® Customer Service Training and accommodation quality standards.
    - Promote free webinars and downloadable *Tourism Business Essentials* guides to industry stakeholders, such as Online Reputation Management and Working with Travel Media, among others (see www.destinationbc.ca/Programs/Guides-Workshops-and-Webinars/Guides/Tourism-Business-Essentials-Guides.aspx#.UznVRq1dXIo).
    - Promote Tourism Vancouver Island Pro-D Day sessions and other education and training opportunities offered to industry partners (see www.tourismvi.ca/get-informed/education-and-training).

Recommended Lead/Responsible: VINT

Involved: Tourism Vancouver Island, Destination BC, tourism operators and staff

10. Continue to build tourism industry knowledge, insight and research that will provide the information needed to execute this plan, as well as provide critical information for business decisions and planning in the future.

Business intelligence is a critical aspect to ensuring tourism development and marketing decisions are being made based on sound research. Efforts should be made to gather and distribute information relevant to VINT, and instill an industry-wide culture of ongoing performance measurement collection and documentation to enable the analysis of trends over time.

Actions:

1. Continue with current research and intelligence program to help measure and monitor business plans and provide input into business decisions.
    a. Omnibus surveys
    b. End of Year Stakeholder Surveys
    c. Continue to measure the impact of promotional campaigns and utilize marketing tactics such as contests, dedicated landing pages, and analytics as tracking tools.
2. Continue visitor data collection through the Visitor Experience Survey to input into the creation of Destination Development Action Plans.
3. Continue to conduct the visitor study, and implement other intelligence gathering as opportunities and resources arise.
4. Work with Destination BC to implement Net Promoter Score tracking.
5. Continue to work with tourism businesses to encourage a culture of tracking and reporting on business performance, including monitoring the following performance measurements:
    - Increase overnight visitation.
    - Increase length of stay.
    - Increase accommodation revenues.
    - Increase awareness, interest and conversion from target markets.
    - Increase Net Promoter Score.
    - Growth in employment in tourism.

    For more information on Net Promoter Score, see Appendix 4.

Recommended Lead/Responsible: VINT

Involved: Tourism Vancouver Island, Destination BC

11. Continue to evolve visitor servicing to meet visitor expectations and influence trip planning behaviour.

Effort needs to continue to be applied to ensure the visitor has the information they need regarding the activities and services that are available in Vancouver Island North.

Efforts should also be made to ensure the tourism community is collectively contributing to creating a positive experience for the visitor as well as understanding the tourism product to be able to encourage visitors to do more and stay longer.

Actions:

1. Develop FAMS for front line employees or offer incentives for employees to explore other areas of the region to familiarize themselves with the tourism product.
    a. Explore the development of virtual FAMS to assist with the geographic disbursement and remoteness of some tourism product throughout the region, e.g., webinars.
2. Develop a visitor servicing strategy for outside of visitor centres to address the growing trend in using mobile platforms for trip planning.
    a. Explore using online visitor servicing tools to provide assistance to visitors while in-destination, e.g., promote #gonorthisland as a visitor servicing channel.
3. Ensure the ongoing collection, analysis and sharing of visitor servicing intelligence.

Recommended Lead/Responsible: Lead Visitor Services Organizations, e.g., Visitor Centres

Involved: Visitor Centres, Visitor Services champions within each community, Destination BC

12. Determine the requirements for the next long-term comprehensive tourism plan.

As there has been significant achievement since the 2008 Tourism Plan, and it is anticipated there may be significant changes over the next one to two years, it is recommended that at the end of this plan's life, a full strategic planning process is embarked on for the development of a more comprehensive longer term strategic plan.

Actions:

1. RDMW and VINTAC to determine the long-term tourism planning requirements and process during 2017, for planning to begin in 2018.

Recommended Lead/Responsible: RDMW

Involved: All tourism stakeholders

4 Appendix

4.1 Appendix 1 - VINT Tourism Planning History

4.1.1 CTF Regional Tourism Plan Development - 2008

In 2006 the region of North Vancouver Island commenced a tourism planning process through the Destination BC (previously Tourism BC) *Community Tourism Foundations* program. Workshops were held around the region and the process resulted in the development of a comprehensive Situation Analysis Report in May 2007 and a Regional Tourism Plan in August 2007. The latter was subsequently updated in June 2008.

The development of this plan was noteworthy as it marked a new regional approach to developing and marketing Vancouver Island North. Recognizing that the visitor tended to see the region as a destination rather than a series of individual communities, the tourism stakeholders associated with the communities of Port Hardy, Port McNeill, Alert Bay, Port Alice and the remaining Electoral Areas of the Regional District of Mount Waddington (RDMW) came together to work on the Plan. Establishing a model based on regional coordination became the framework of all the efforts that were to follow.

A review of the 2008 Regional Tourism Plan reveals that a significant amount of the plan has been realized, including Tourism Management (establishing VINT, Governance and Funding) and Marketing. The one area identified by the March, 2015 workshop participants as still not being complete are the following selected Destination Management Strategies:

1. Tourism Awareness

    - Raise the level of awareness of the value of tourism to the economy within the region's communities and municipalities.
    - Raise the awareness of tourism among local businesses.
    - Implement Destination BC's "Value of Tourism" model to generate baseline estimates of tourism's contribution to the region.
    - Campaign for a tourism industry column in the local newspapers.

2. Quality Assurance

    - Ensure that product quality meets marketplace expectations (this would include product development activities to improve the quality of accommodation offerings).
    - Ensure tourism operators are aware of and encouraged to participate in quality assurance programs (criteria for participation in VINT programs).

3. Training and Development

- Provide information and resources to ensure people and organizations in tourism have access to the appropriate training and professional development programs.

4. Transportation Infrastructure

- Support initiatives to improve transportation infrastructure and services.

5. Investment Promotion

- Facilitate investment by existing tourism operators.
- Attract investment to the City either for joint ventures with local operators or for new investments.

4.1.2 CTF North Vancouver Island Tourism Plan Update Report - 2011

In May 2011 Destination BC (at the time Tourism BC) facilitated a 'revisit' to Vancouver Island North to review progress and establish new priorities. A full-day workshop was attended by 19 stakeholders representing a cross section of tourism-related businesses, community organizations, local government and First Nations from within the region. The discussion provided an opportunity to identify areas of progress in destination marketing, product development and tourism management, and to consider factors that may need addressing in moving forward.

Overall, the discussion on implementation of the plan highlighted the benefits that were gained from this collaborative approach.

A review of the Tourism Plan Revisit shows that much of the work has been achieved or is in progress on the one strategic goal and five priorities identified. The following was developed by VINT and provides an update for each of the priority initiatives:

Strategic Goal – Increase room revenue by an average of 4% per annum over the next 3 years

The regional room revenue collection increased by an average of 5% per annum between 2011 and 2013. However, 2013 was an anomaly as there were 2 large industrial projects on the North Island that inflated the room revenues but will be only a one-time increase opposed to a trend. 2014 numbers are not yet available.

- 3% increase from 2011-2012
- 7% increase from 2012-2013

Priority 1 – to develop a strong, unified organizational structure and strengthen the partnership-based approach to tourism growth and development

- Tactic 1 – to review the Vancouver Island North Tourism (VINT) delivery model.

    - The delivery model was reviewed by Tourism Vancouver Island in the fall of 2011, and again by a sub-committee of the Vancouver Island North Tourism Advisory Committee (VINTAC) in the fall of 2013. After both reviews the decision was made to remain as a project of the RDMW with contracted management from Tourism Vancouver Island, additionally after the 2011 review changes were recommended by VINTAC and accepted by the RDMW Board to adjust the committee structure to have a stronger stakeholder focus.
- Tactic 2 – to define and maintain a clear understanding of the roles of the various partners in developing the tourism industry and building its value as part of the regional economy.
    - In May 2014, the RDMW undertook a Strategic Sectors Study for the region and identified Tourism as a strategic sector. There will be action plans developed for each sector and a list of action items that will be implemented at the Regional District level. The study will be complete early in 2015.
- Tactic 3 – continue to explore new funding opportunities and be well positioned to capitalize on these.
    - VINT has discussed potential partnership opportunities with AtBC but there have not been any specific projects identified to move forward with at this time. VINT, along with Campbell River and Comox Valley, was successful in accessing ICET funding to assist with a visitor survey in 2015.
- Tactic 4 – to build stronger relationships with the First Nations communities
    - In September 2011, VINT assisted in coordinating an Aboriginal tourism workshop in partnership with the Gwa-sala-'Nakwaxda'xw and AtBC. VINT also presented and participated in the Aboriginal Cultural Tourism Forum hosted by AtBC in November 2013. In addition, as mentioned above, VINT has open, direct conversations with AtBC regarding the potential of project partnerships in the future.
- Tactic 5 – to use a variety of tools to communicate with stakeholders
    - VINT regularly distributes newsletters via email to a stakeholder database, a stakeholder area has been developed as part of VINT's main website, and VINT has also hosted a Tourism Season Launch Event in May of each year since 2011.

Priority 2 – Consolidate positioning of Vancouver Island North as an accessible pristine wilderness with supportive cultural visitor experiences

- Tactic 1 – to refine positioning in a way that resonates with the target markets and reflects the products on offer.
    - A detailed marketing plan has been developed each year with projects that position the experiences of the region appropriately for the target markets. In 2014 VINT initiated Omnibus surveying to measure awareness of the VIN region and experiences. Targets and results are included in the annual VINT Strategic Business Plan documents.
- Tactic 2 – to ensure all HelloBC marketing opportunities are realized.

    - VINT assisted TVI on the community pages from the region during the HelloBC website redesign in 2013. VINT has reached out to HelloBC bloggers with content and potential story ideas from the region. VINT also provides content to TVI for inclusion in their newsletter that is distributed to media through the provincial database.
- Tactic 3 – Review the CTC's Explorer Quotient (EQ) program
    - VINT entered into a sub-licensing agreement for EQ in partnership with TVI and a group of Vancouver Island communities in 2012, 2013 and 2014. The research and tools provided have been used to guide marketing efforts since acquiring access to the tools. VINT has participated in training sessions and an EQ conference to better understand the value and importance of this program. VINT has also added an option for CTC Signature Experience operators to display this on their stakeholder page of the VIN website with a description available for consumers who may not be familiar with the program.
- Tactic 4 – to undertake research with stakeholders to substantiate the apparent strength of the European market and identify ways to support this market
    - Most work has been done in partnership with TVI and DBC to build relationships with travel trade to introduce the available experiences. In May 2014 VINT hosted a pre-FAM for a group of international operators attending the Rendez-vous Canada event in Vancouver. VINT also participated in a travel trade networking event hosted by TVI in Victoria in March 2014. We have also supported many individual FAM tours coordinated through TVI and DBC. VINT launched a new website at the end of 2013 and added a translation function.
- Tactic 5 – to explore the use of contests to build repeat traffic to the VINT website
    - VINT has run three contests over the past year but they have generally been driven through social media, which perhaps was not as active in 2011 at the time this report was created which is probably why web was the focus verses social.
- Tactic 6 – to ensure social media is used strategically to support key marketing objectives
    - VINT has been steadily building social channels over the past number of years. In 2013 and 2014 a content calendar has been created to ensure content includes experiences and events at appropriate times.
- Tactic 7 – explore opportunities to develop a mobile app
    - When VINT completed the site redesign, it opted to ensure it was fully responsive and accessible on all types of devices. It was felt that this was a priority over developing a regionally specific app at this time.
- Tactic 8 – use the website to prepare visitors for different lengths of stay
    - In the spring of 2013, VINT launched a site dedicated to providing trip planning assistance by activity type giving visitors the opportunity to see how they could spend 1-2, 2-5 or 5+ days in the region http://gonorthisland.com/
- Tactic 9 – stronger effort to drive specific business to stakeholders and to 'close the deal' by using cooperative web-based campaigns and special offers

    - It was challenging to coordinate stakeholder participation (communication of specials, appropriate timing, etc.) and deliver an appropriate web-based cooperative campaign that delivers a regional and stakeholder specific sell and that stakeholders will buy-in to.
- Tactic 10 – to work closely with Comox Valley and Campbell River to encourage a northward and southward distribution of visitors
    - In 2014, VINT met with the managers at the Comox Valley and Campbell River Visitor Centres to discuss ways of offering mutual support and to explore the opportunity of a North Island FAM tour for staff at the Centres prior to the 2015 summer season.
- Tactic 11 – to undertake further discussion with BC Ferries and explore new opportunities for packaging that include a ferry travel component
    - Unfortunately we have seen a weakening rather than a strengthening in BC Ferries service to the North Island. With the route changes and reductions in sailings, visitation to the North Island has been negatively impacted. VINT have made efforts to connect with BC Ferries vacations but the commission structure and blocking requirements are not suitable for a number of operators in the region.

Priority 3 – Develop a more comprehensive appreciation of the value of tourism on the local economy through an industry-wide commitment to sharing appropriate data

- Tactic 1 – to work with Destination BC (previously Tourism BC) to implement the Value of Tourism model
    - Challenges have been encountered with the type of bookkeeping required, the willingness of participants, and perhaps most challenging,the nature of our project as a regional program instead of being based in just one community. This would be very difficult to implement with the project structure.
- Tactic 2 – to develop monitoring systems to measure the impact of promotional campaigns and to assess the value of attending consumer shows
    - VINT measures and tracks all online initiatives on the website and on social channels. VINT has used contests, dedicated landing pages, and analytics as tracking tools. Consumer show contest entries have been used to measure visitation and build the consumer database. Tracking of collateral distribution at consumer shows is also a way VINT measures visitation. As for printed publications (regional guide, visitors map), VINT keeps close track of the distribution to ensure guides are getting out, thereby maximizing the investment.
- Tactic 3 – work with activity operators to build a culture of reporting
    - In 2013 and 2014 VINT distributed a stakeholder survey at the end of the summer season that included general questions for stakeholders on whether their visitation increased, decreased, or stayed the same. The same question was asked about their revenue.
- Tactic 4 – explore opportunities to build research capabilities through a partnership with VIU

    - Earlier in 2014 VINT entered discussions with the RDMW regarding research in the form of a Visitor Experience Survey. Preliminary stages of this project are being executed.
- Tactic 5 – create a password-protected page on the website to report trends to stakeholders in a timely manner
    - Once VINT has more data to report, this is something that can be implemented in the stakeholder area of the website.

Priority 4 – Promote an understanding that the product offer is the core of the destination in a way that inspires improved customer service and development of new products

- Tactic 1 – to develop a comprehensive product inventory
    - VINT uses a stakeholder database but has not completed the comprehensive product inventory yet.
- Tactic 2 – all local governments should work to establish conditions for economic growth through tourism
    - Items under this tactic are included in RDMW's Strategic Sectors Study mentioned under Priority 1, Tactic 2.
- Tactic 3 – continue to explore opportunities to move forward with projects identified in the Outdoor Recreation Resource Initiative
    - RDMW is moving forward in direct involvement in development of trails. VINT are able to offer support to the RDMW in their initiatives and assist in coordinating communication with other groups.
- Tactic 4 – to develop an inventory of existing industrial heritage sites and themes that will enhance visitor experience
    - The RDMW has assisted in two industrial heritage initiatives, the Woss 113 Locomotive heritage park and the return of the Hornsby Steam Crawler to Coal Harbour. VINT has promoted these sites.
- Tactic 5 – to focus on raising the level of both customer service and general understanding of the significance of tourism
    - VINT has hosted the Introduction to Online Reputation Management and the Advanced Online Reputation Management seminars in the region. VINT has also provided a general customer service workshop and partnered with the Port Hardy Chamber of Commerce to sponsor a WorldHost workshop.
- Tactic 6 – to support the creation of a regional four-season recreation area at Mount Cain Ski Area
    - The ski area has not moved forward with any initiatives to move towards activities outside of the winter ski season
- Tactic 7 – continue to identify ways to support the growth of Aboriginal cultural tourism and the arts and culture sector in general

- As described in Priority 1, Tactics 3 and 4, VINT has been working with Aboriginal Tourism BC and local First Nations tourism operators to support the growth of cultural tourism on the North Island.

Priority 5 – Promote a widespread commitment to protecting the underlying resource-based and landscape values of the region and to strengthening the environmental sustainability of the industry

- Tactics 1 – clarify resource-based issues and act on behalf of the issues.
- Tactic 2 – build greater awareness of environmental issues and promote the need for sustainable business practices.
- Tactic 3 – encourage all tourism stakeholders to play an active role in land-use planning and work collectively to protect threatened resources and landscapes.
  - As a project of the RDMW, VINT does not actually have the ability to take an advocacy role in land-use issues. The RDMW's Strategic Sectors Study does address the interaction between industries on the North Island and could potentially lead to some action around land-use considerations.
- Tactic 4 – continue to focus on visitor amenity spaces and the creation of a strong 'sense of space'.
  - Economic development planning were held in sessions in Port McNeill and in Sointula that address these issues but VINT very much plays a support role and are not directly responsible for any sort of revitalization initiatives.

4.1.3 VIN Business Plan – 2013

In the fall of 2013, as a component the Vancouver Island North Tourism annual planning sessions, the Vancouver Island North Tourism Advisory Committee undertook a review of the regional tourism project's Vision and Objectives that had been determined for the project as part of the original Tourism Plan, released in June 2008.

The Advisory Committee took this opportunity to update the vision statement and the project objectives, add a mission statement and create a new format for the Vancouver Island North Tourism Strategic Business Plan that would detail goals, objectives with performance measurements, strategies and tactics. This new format was developed as a 3-year rolling plan that would be reviewed and updated during the annual planning sessions.

4.1.4 RDMW Strategic Sectors Study

In May 2014, the RDMW undertook a Strategic Sectors Study for the region and identified Tourism as a strategic sector. The top initiatives for the Tourism sector are noted below[25]:

[25] Strategic Sectors Study Mount Waddington Regional District January 2015
http://www.northislandresource.ca/media/2015%2001%2022%20Revised%20Draft%20SS%20report.pdf

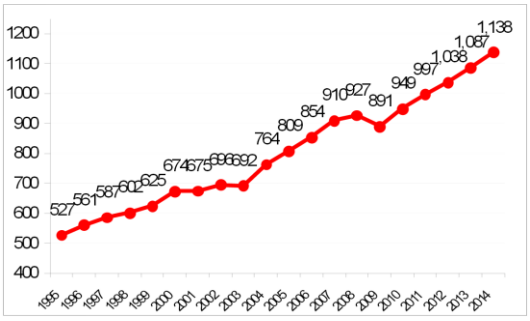
Ongoing	Short term (<1 year)	Medium term (1-3 years)	Action	Description
			Support VINT	Continue to fund Vancouver Island North Tourism, potentially helping them increase capacity to conduct additional research and outreach.
			Support trail improvements	Upgrade trails and related signage, improve marketing and way-finding.
			Hospitality training	Support hospitality training and education across the North Island (including to businesses that are not primarily tourism oriented, but nevertheless interact with visitors).
			Event marketing	Support an increase in the number and visibility of festivals, particularly those that focus on visitors rather than locals (e.g. Alert Bay 360), and on existing tourism assets. For example, trail running events, biking, triathlon, cultural events (museum tours, etc.).

4.2 Appendix 2 - Operating Environment

4.2.1 Global Tourism Environment

Despite various shocks, international tourist arrivals have grown 40-fold, from 25 million in 1950, 278 million in 1980, 436 million in 1990, 677 million in 2000, and reaching 1.138 billion in 2014 (Figure 6).[26] The United Nations World Tourism Organization's (UNWTO) Tourism 2020 Vision forecasts that international arrivals are expected to reach 1.4 billion by the year 2020.

Figure 6: World Inbound Tourism International Tourist Arrivals (millions)



Source: UNWTO World Tourism Barometer, January 2015

With a ten-year positive outlook on International tourism arrivals, the UNWTO's forecast is for tourism to continue to be a strong, healthy industry globally over the next decade, although the Americas will show lower-than-average growth rates.[27] The latest numbers released by the UNWTO show the fifth consecutive year of above average growth since the 2009 economic crisis: international tourist arrivals grew by 4.7% in 2014. For 2015, UNWTO forecasts 3% to 4% growth, with the Americas seeing stronger growth of 4 to 5%.[28]

4.2.2 Consumer Shifts and Trends

The following consumer shifts have impacted the worldwide travel industry:

- There is expected to be increasing competition for global tourist dollars as more destinations are seeing the economic benefits of tourism and are aggressively trying to attract visitors.
- Nature will be increasingly valuable in a world with rapidly urbanizing populations and disappearing natural habitats.
- Travellers are increasingly seeking memorable experiences that are authentic, personalized and involve social and cultural interaction.

[26] UNWTO, http://media.unwto.org/press-release/2015-01-27/over-11-billion-tourists-travelled-abroad-2014
[27] Source: http://mkt.unwto.org/publication/unwto-tourism-highlights-2014-edition
[28] Source: http://media.unwto.org/press-release/2015-01-27/over-11-billion-tourists-travelled-abroad-2014

- Digital mobile technologies are changing the way people communicate, access information, assess credibility, and make decisions, in particular over the last five years. With social media, individuals can influence the thinking of millions in hours or minutes. Mobile technology is also allowing travellers to shift plans and change bookings very quickly. Despite all the digital opportunities, face-to-face interactions remain paramount.
- As the Path to Purchase model changes, destinations need to provide travel prospects a wide variety of types of travel information through many different channels.
- With the increased availability of trip planning information, travellers are seeking curated content sources that saves them time. This includes both the increase in the appeal of visual content (images and videos), as well as edited content that helps them navigate the clutter.
- People are travelling more frequently and go to more destinations than before, not simply for leisure, but for business, conferences, events, trade and health care. Travel is often multi-purpose.
- The rise of the sharing economy has solidified the legitimacy of disruptive travel experiences[29], such as Airbnb and Uber. In particular, these new travel sources are attractive to millennials.
- Changing demographics with aging baby boomers and an increase in middle class from many overseas markets. Individual incomes have risen in most countries, making more products and services affordable, which is changing people's attitudes towards work and leisure.
- Consumers are becoming more sophisticated travellers, with a corresponding increase in the expectations of quality service delivery.
- Interest has grown for multiple activities and experiences packaged as a complete itinerary. [30]

4.2.3 Canadian Tourism Environment

2014 was a strong year for the tourism sector in Canada, with particularly strong increases in arrivals from the key markets where the Canadian Tourism Commission (CTC) invests in marketing and promotion with their partners, which includes Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea and the UK. All major tourism indicators for Canada rose, especially tourism revenue, GDP, employment and arrivals, according to CTC research estimates:[31]

- Total overnight trips to Canada increased by 3.2% to 17.1 Million.
- Total revenue generated from international visitors increased by 4.9% to $17.3 Billion.
- Overnight trips to Canada from CTC markets increased by 10.1% to 2.94 Million. European markets noted include Germany up 3.5% to 301,000 visitors and UK up 4.8% to 644,000 visitors.
- Revenues generated from CTC markets increased by 13.7% to $4.74 Billion.

[29] Disruptive travel experiences are defined as a development that overturns traditional business models.
[30] Sources: Destination BC, *UNWTO,* Skift,
[31] *2014 Annual Report: Tourism as Canada's Engine for Growth,* Canadian Tourism Commission

4.2.4 BC Tourism Environment

Tourism is a critical sector within BC's economy[32]:

- In 2013, the tourism industry generated $13.9 billion in revenue, a 3.6% increase from 2012, and a 44.3% increase from 2003.
- In 2012, $1.5 billion of accommodation room revenue was earned in communities with the Municipal Regional District Tax (MRDT), an increase of 1.6% from 2011.
- The tourism industry contributed $7.3 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 2.1% growth over 2012 and 7.2% growth since 2007.
- In 2013, there were 19,254 tourism-related businesses in BC, up 3.9% from 2012 and 6.3% from 2003.
- The tourism industry employed 132,200 people in 2013, an increase of 3.0% over 2012 and 17.6% over 2003. In 2012, the tourism industry paid $4.5 billion in wages and salaries, up 3.8% in 2012 and a 34.4% increase since 2003. Average compensation in the industry is just over $34,000.

Tourism plays an important role in diversifying the economic base throughout British Columbia. The following provides an overview of the current operating environment and some of the challenges faced by the industry.

- Rise of the US travel market after years of decline. In particular, the low Canadian dollar and favorable gas prices may also positively impact visitations from the US travel market to BC.
- According to the B.C. Tourism Labour Market Strategy, there are pending labour shortages for tourism throughout BC. There is a requirement for 101,000 jobs by 2020; 44,000 new jobs and 71,000 job replacements.[33]
- There has been a growth in the awareness and availability of aboriginal tourism experiences throughout BC, with efforts led by Aboriginal Tourism Association British Columbia (AtBC).
- In general, there has been an increase in the number of destinations throughout BC looking to tourism to increase their local economy.

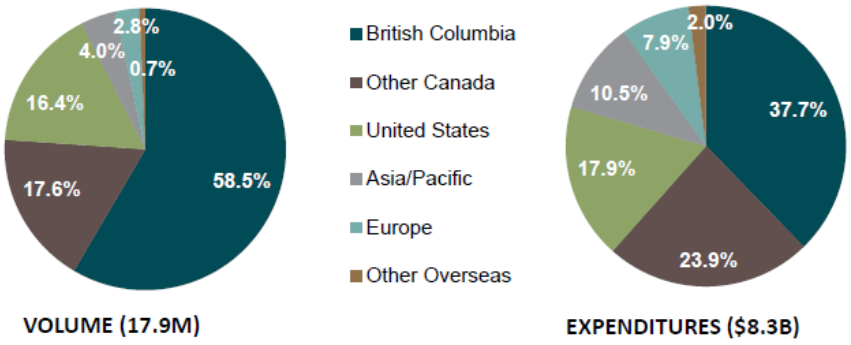
[32] Destination BC, Value of Tourism 2013 http://www.destinationbc.ca/Research/Industry-Performance/Value-of-Tourism.aspx
[33] Source: www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx

4.3 Appendix 3 - Visitor Analysis

4.3.1 BC Visitors

In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent $8.3 billion, a decline of 2.4% from 2011[34]. Over half of the visitors (58.5%) were British Columbia residents (Figure 7). Visitors from other parts of Canada accounted for 17.6 % of all visits, while international visitors accounted for the remaining 23.9% of visitor volume.

Figure 7: Overall Visitor Volume and Expenditures by Market Origin (2012)



Source: The Value of Tourism in British Columbia February 2015, Destination BC

As BC and Other Canadian travellers are the majority of the market, in 2012, the following travel characteristics have been provided[35]:

- On average, BC residents spent just under three nights during a trip in their home province while other Canadian residents spent over five nights during a trip in BC.
- Generally, about 15.9% of travel parties included children under 18 years of age.
- BC residents spent an average of $130 per travel party per night during their trip while other Canadian residents spent $162 per party per night, on average.
- Food and beverage tended to account for the largest proportion of trip spending followed by accommodation and vehicle costs (private vehicles or rentals).

4.3.2 Vancouver Island Visitors

At the provincial level, Destination BC has produced regional profiles for each of the six tourism regions in the province. Key findings from the Vancouver Island profile include:

[34] Source of domestic data: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC).
[35] Destination BC - Statistics Canada Travel Survey of Residents of Canada

- The Vancouver Island region received 3.8 million overnight person-visits in 2012 and generated $1.3 billion in related spending. Domestic overnight travellers accounted for 75% of visitation and 60% of related spending. International travellers accounted for 25% and 40%, respectively
- On average, domestic travel parties in the Vancouver Island region stayed 3.2 nights and spent $123 per night during their trip. US travel parties stayed 4.1 nights and spent $220 per night during their trip, and Other international travel parties stayed 7.6 nights and spent $122 per night during their trip in the Vancouver Island region.
- Approximately half of all traveller nights in the Vancouver Island region were spent in the residences of friends and family for BC, Other Canadians and Other international residents.
- Overnight travellers who spent one or more nights in the Vancouver Island region took part in a number of outdoor activities during their trip, including visiting national or provincial parks, visiting a beach, hiking/backpacking, and boating* (Figure 8).

Figure 8: Top Activities on a Trip to Vancouver Island Region

	BC residents	Other Canadians	**US residents	**Other international
1	Beach	Beach	Zoo or aquarium	National, provincial or nature park
2	Hiking or backpacking	National, provincial or nature park	Historic site	Museum or art gallery
3	National, provincial or nature park	Hiking or backpacking	Museum or art gallery	Zoo or aquarium
4	Camping	Wildlife viewing or bird watching	National, provincial or nature park	Historic site
5	Wildlife viewing or bird watching	Historic site	Boating	Boating

Source: Vancouver Island Regional Profile, January 2015, Destination BC

*Please note that the activities listed could have taken place anywhere on the trip, not just in Vancouver Island.

** Please note that the following activities were not included in this analysis: visit friends or family, shopping, sightseeing, bar/night club, sport/outdoor activity unspecified.

- Most people travelled in the Vancouver Island region during the peak summer months, particularly Other Canadian, US residents and Other international travellers. Over one-quarter of Other Canadians, US and Other international travellers visited during the spring months from April to June, particularly US residents (32%). British Columbia residents were more likely to travel to the region during the winter months than other markets of origin (Figure 9).

Figure 9: Vancouver Island Visitation by Season

Season of travel	BC residents	Other Canadians	US residents	Other inter-national
January to March	20%	15%	7%	12%
April to June	22%	31%	32%	28%
July to September	37%	42%	46%	49%
October to December	21%	12%	15%	11%

Source: Vancouver Island Regional Profile, January 2015, Destination BC

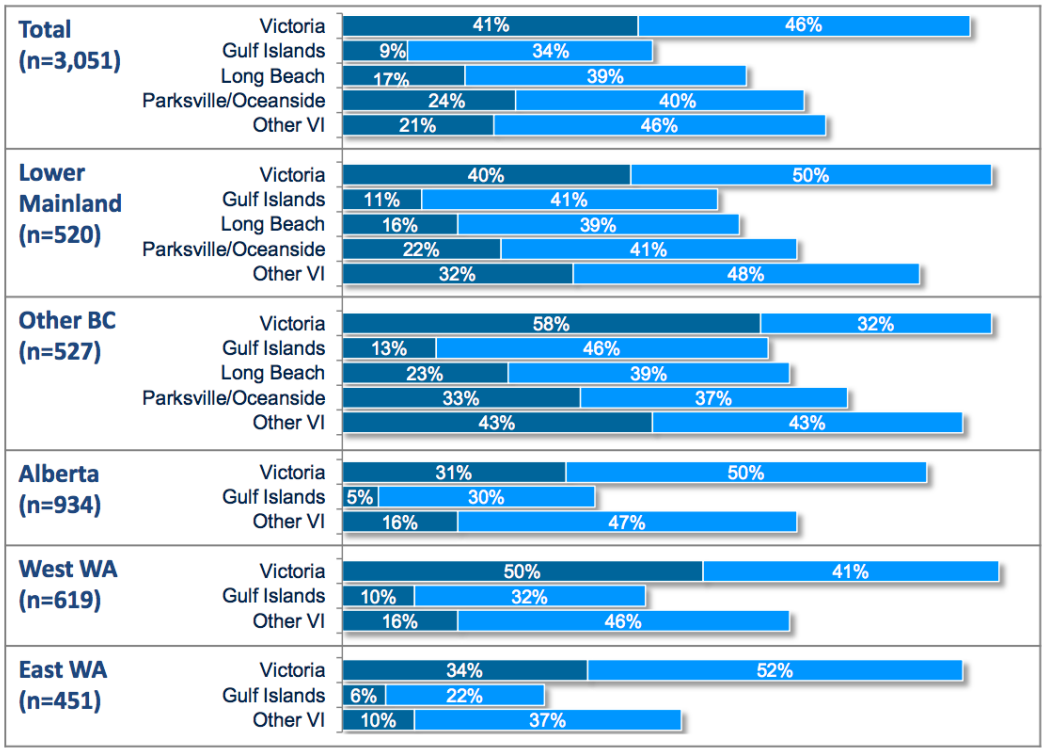
More details can be found at: http://www.destinationbc.ca/getattachment/Research/Research-by-Region/All-Regional-Profiles/Vancouver-Island-Regional-Profile/RegionalProfiles_Vancouver-Island_2014.pdf.aspx

The following are key highlights for the Vancouver Island (VI) region taken from the Destination BC *British* Columbia In-Market study conducted with BC, Alberta and Washington state travellers in November 2011 and April 2012. A full report on the findings is available at http://www.destinationbc.ca/getattachment/Research/Research-by-Region/Vancouver-Island/In-Market_Regional_Report_VI_2012.pdf.aspx.

- Visitors to any BC region are looking for destinations that offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.
- Most respondents have some level of familiarity with Vancouver Island destinations, particularly Victoria.
- Key activities which motivated trips to VI were sightseeing/nature/wildlife viewing (37%), visiting friends or relatives (33%). Visiting national and/or provincial parks was listed third (14%), followed by visiting rural community or communities (12%).
- It then follows that visitors to VI are likely to participate in sightseeing, nature, wildlife viewing, shopping, visiting national or provincial parks and visiting friends or relatives on their trip.
- Two-thirds (68%) of respondents are likely to visit Vancouver Island in the next two years, most likely for a 'getaway' (1-2 nights) or a 'mini-vacation' (3-5 nights) during the summer.
- Outdoor recreation activities, experiencing scenery and nature and to relax and unwind are key motivators for future trips to VI.
- The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre-trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.
- Cost/the perception of it being too expensive as well as preferring to visit a different or international location, are key reasons given by respondents who are unlikely to take a trip to VI in the next two years.
- Almost three-quarters (72%) of respondents from the survey who visited VI have a positive overall impression of the region, which ranks it 1st out of the 6 British Columbia Tourism regions.

When respondents were asked about their familiarity with Vancouver Island destinations, not surprisingly, Victoria was the VI destination with the highest familiarity. BC Residents tend to have the highest familiarity with lesser-known Vancouver Island destinations compared to Albertan and Washington State residents (Figure 10).

Figure 10: Familiarity with Vancouver Island - by Market Origin, 2012



Note: Only BC residents rated their familiarity with Long Beach & Parksville.

Source: 2012 In-Market Research Report, Vancouver Island, Destination BC

4.3.3 Visitor Analysis - Outdoor Activities

Destination BC has conducted research on key tourism products. Outdoor activities, a key product offering in VINT, is one of them.

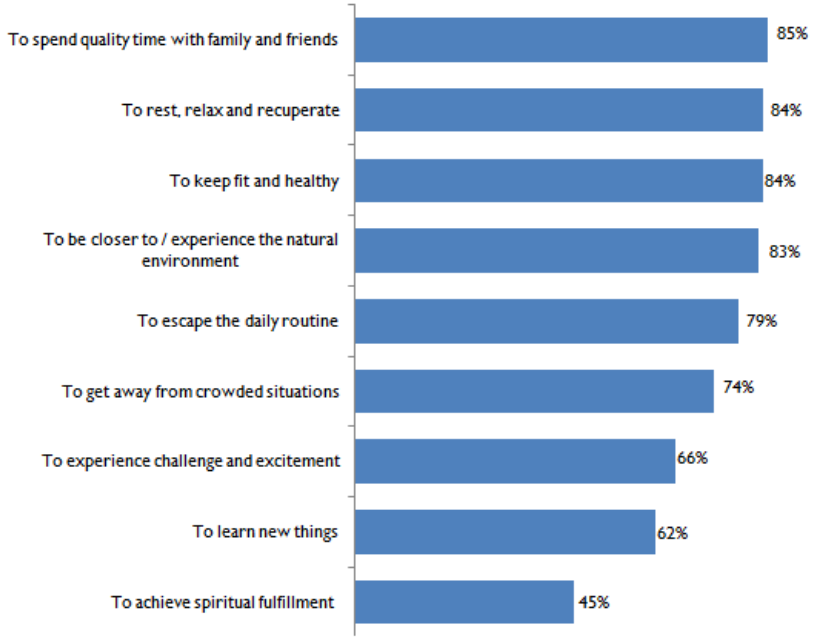
In 2005, over 1.2 million people participated in BC commercial outdoor adventure tourism, an increase of 24% from 966,000 in 2001. US visitors and BC residents are the heaviest participants of outdoor adventure tourism in BC. According to the 2009/10 Outdoor Recreation Study: BC Resident Participants, the majority of BC residents (91%) participated in at least 1 outdoor recreation activity during the past year. Of those that had participated, nearly two-thirds (64%) participated in activities at least once a week.

The most common outdoor recreational activities of BC residents include day hiking (55%), beach activities (51%), and swimming at a lake or river (49%). Participation rates vary by region and tend to

depend on recreational assets available (e.g. higher participation in ocean activities among those living on the coast).

BC resident's primary motivators for outdoor recreation participation are to spend quality time with friends / family, to rest, relax, and recuperate, and to keep fit and healthy (Figure 11).

Figure 11: Top Motivations for Participating in Outdoor Recreation for BC residents



Source: Outdoor Adventure at a glance, January 2014, Destination BC

Key market segments for BC's outdoor adventure products are aging. Physical limitations of aging participants may require businesses to address potential accessibility concerns. As the population ages, it is predicted the demand for soft adventure activities such as wildlife viewing and walking will grow.

Visitors cite the natural environment, diversity of outdoor activities, and spectacular scenery as primary motivators for choosing to vacation in BC. [36]

For more information: http://www.destinationbc.ca/getattachment/Research/Research-by-Activity/All-Sector-Profiles/Outdoor-Adventure-Sector-Profile,-May-2014/Tourism-Sector-Profile_OutdoorAdventure_May2014.pdf.aspx

[36] Destination BC – Parks Canada and BC Parks

4.3.4 Visitor Analysis - Aboriginal Tourism[37]

Cultural Tourism Experience, which includes Aboriginal Tourism Experiences, is a key sector for Vancouver Island North. The number of overnight visits to British Columbia, which included some form of Aboriginal cultural tourism, increased by an estimated 97% between 2006 and 2010 to approximately 3.7 million visits, almost double the number from 2006. This growth is most pronounced among the Canadian market (+106%) which accounts for approximately half the Aboriginal cultural tourism volume.

This sector is growing exponentially, however Aboriginal cultural tourism products and activities currently tend to be sought out at the destination rather than serving as the primary travel motivation.

According to the 2012-13 Global Tourism Watch report, British Columbia's top international tourism markets are enthusiastic about Aboriginal cultural tourism experiences. Germany, South Korea, and United Kingdom are showing considerable interest in Aboriginal cultural tourism as these markets have indicated the importance of the opportunity to experience Aboriginal cultural tourism when selecting a destination.

For more information: http://www.destinationbc.ca/getattachment/Research/Research-by-Activity/Aboriginal-Tourism/Tourism-Sector-Profile_AboriginalCulturalTourism_May2014.pdf.aspx

4.3.5 Destination Marketing Association International – Travel Behavioural Trends

The following trends were identified within the Destination Marketing Association International (DMAI) DestinationNEXT global industry report[38] as "the 20 Trends Destination's Need to Understand to Compete for Tourists". The report was designed to help DMOs understand travel behavioral trends and suggest strategies to capitalize on those trends. The 20 trends are highlighted below:

1. Social media's prominence in reaching the travel market (e.g., Facebook, Pinterest, Twitter, Weibo).
2. Mobile platforms and apps becoming the primary engagement platform for travelers.
3. Customers increasingly seeking a personalized travel experience.
4. Smart technology (e.g., phones, bag tags, and cards) creating new opportunities for innovative new services and processes.
5. Travelers demanding more information, control, interaction, and personalization.
6. Geotargeting and localization becoming more prevalent.

[37] Tourism Sector Profile – Aboriginal Culture Tourism, May 2014, Destination BC
[38] DMAI DestinationNEXT Report, 2014: http://www.destinationmarketing.org/sites/destinationmarketing.org/files/DestinationNEXT%20Report%20Phase%201%20July%2022%202014%5B2%5D.pdf

7. Brand identity for destinations becoming more critical in terms of meeting planner perceptions about value and experience.
8. Customers increasingly looking for a travel experience that allows them to experience a local's way of life.
9. Technology enabling faster decision-making by customers, thereby, increasing business to a destination.
10. Consumers becoming increasingly comfortable with ordering products online.
11. Hotel taxes increasingly vulnerable to alternative politically based projects.
12. Big Data arriving for the tourism industry.
13. The brand of a destination becoming a more important factor in travel decisions to consumers.
14. Governments facing pressure to reduce or eliminate direct financial subsidies to the tourism sector.
15. Short-stay trips and mini vacations becoming increasingly popular.
16. More third-party information providers aggregating content about destinations.
17. Peer-to-peer buyer influence driving customer purchases.
18. Governments dealing with tourism from an integrated, multi-departmental perspective, focused on economic development.
19. Customers increasingly going directly to suppliers for goods and services.
20. Economic conditions continuing to be highly volatile, subject to global and regional shocks.

4.4 Appendix 4 – Net Promoter Score

The following has been provided by Destination BC:
http://www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx

The Net Promoter Score (NPS), developed by Frederick Reichheld and Bain & Company in 2002, is a simple metric that helps organizations monitor the engagement of their customers. It reflects the likelihood that customers will recommend a product/company/place to friends, family or colleagues.

In the context of the tourism industry, NPS is based on responses to the question, "How likely are you to recommend [VINT] as a travel destination to a friend, family member or colleague?" Responses are scored from 0 = "not at all likely" to 10 = "extremely likely". Respondents are divided into three categories:

- **Detractors** (scores of 0 to 6): Unhappy visitors, unlikely to tell others to visit and might even damage the reputation of a destination through negative word of mouth.
- **Passives** (scores of 7 or 8): Marginally satisfied visitors not excited enough to tell others about their travel experience.
- **Promoters** (scores of 9 or 10): Loyal enthusiasts likely to return and rave about their travel experience.

NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.

The intention to recommend a travel destination, reported by the NPS, is a proxy measure of overall satisfaction with the travel experience. Satisfaction with the travel experience and the intention to recommend greatly increase the likelihood of a return visit to British Columbia. And word of mouth advocacy, either face-to-face or through social media, is critical for attracting first time visitors to British Columbia.

NPS is regarded by researchers as the question that best predicts the future growth of customer centric businesses like the tourism industry. Many tourism businesses and destination management organizations, including the Canadian Tourism Commission, are also measuring NPS to help monitor and measure efforts to improve customer loyalty.

The original research that developed NPS is described in an article by Frederick F. Reichheld in the Harvard Business Review: https://hbr.org/2003/12/the-one-number-you-need-to-grow.

4.5 Appendix 5 - Start Stop Continue Change

During the March, 2015 planning session, participants were asked to identify the initiatives they felt should either be starting, stopped, continued or change to improve tourism in Vancouver Island North. The following are the results from that exercise, including the groups ranking of the most important initiatives.

START

- Educate our communities about tourism (7 votes)
- Fish market and selling wild product (7 votes)
- Marketing to our target in advance vs when they're already here (4 votes)
- Revitalize downtown (3 votes)
- Communicating with other Communities (Outside NVI) (1 vote)
- Sector development strategy (1 vote)
- Being more professional – raise the bar for ourselves
- Inter/operator packages community
- Advertising more
- Nice restaurants
- Education in the school system, with a plan
- Anything that keeps people here longer
- Celebrating our mountain sports. Promote more off-highway sport activities like mountain biking
- Education knowledge (tours, workshops) about flora and fauna of area
- Marketing to the motorcycle community
- Welcome our neighbours
- Enhancing website
- Product investment
- Collaborating /Partnerships with other operators and promoting each other's business
- Community Transportation options
- Strengthen relationship with Victoria/Tofino
- Being a priority
- Building more bridges – working together towards common goals (bigger picture)

STOP

- Undervaluing tourism (6 votes)
- Current travel guide (2 votes)
- Being so complacent saying "Oh, it's just Port Hardy" or "Oh, it's just the North Island" (1 vote)
- Depending on government grants for projects that are permanent (1 vote)

- "Waffling" with ferry service.
- Complaining about weather
- Blaming
- Loss of infrastructure (1 vote)
- Looking at all VI as competitors
- Looking at the post and moving forward
- Ignoring our elders
- Marketing non-tourism product in our social media
- Print material being 60% of the budget. Use money for on-line and it saves the planet
- Making excuses for Sointula
- Complaining about what we don't have and emphasizing what we do have

CONTINUE

- The focus on cultural tourism and understanding. Protecting Salmon/water/environment (11)
- Partnerships between operators (4)
- Sharing our culture – to be hospitable (1)
- Co-op advertising (1 vote)
- Improve local tourism awareness e.g., TVI Power of Tourism
- Sharing and working with FN
- Active visitor info centre staffed with knowledgeable people
- Continue being a friendly and welcoming region (remind locals that this is something special about the region)
- Improving our marina facilities
- Educating ourselves
- Education about tourism
- To educate people about Sointula and other communities
- Social media marketing and improve it – expand it
- VINT with government
- With VINT!
- Website
- Videos/operators/area specific
- Using website (VINT) social media
- Supporting VINT as an organization. Communities coming together regionally.
- Pushing for employee retention (courses, etc)

CHANGE

- Better transportation. (9 votes)
- Working truly together to having a "North Island Plan", an overarching plan through industry – communities, First Nations, Government (e.g., Tofino, Ucluelet) (2 votes)

- Advertising to web media (1 vote)
- Current NVI travel guide (1 vote)
- Focus of industry as North Island (include tourism as a game changer) (1 vote)
- The quality of our accommodations by helping operators with tax breaks or loans.
- Find way to create more demand so we are busier, e.g., locally-themed conferences.
- Level of maintenance expenditures
- The way we think
- More professional service sector.
- Image as a tourism destination
- Community goals.
- Visitor centre longer
- Our signage
- Attitude towards tourism.
- Make our village more attractive, e.g., painting
- Look of downtown areas: market street, Port McNeill “Industrial Zone”, empty buildings, etc
- We think it’s great that we have the transportation infrastructure that we have, however we could use transportation enhancements – more bus routes and earlier ferry from Malcolm island