

## COMMUNITY TOURISM FOUNDATIONS

### S O U T H E R N   G U L F   I S L A N D S T O U R I S M   P L A N

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**FINAL**

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Destination BC Representative:

Alison McKay and Aimee Epp

(604) 660-3754

[alison.mckay@destinationbc.ca](mailto:alison.mckay@destinationbc.ca)

Vancouver Island Tourism Region:

Jody Young

(250) 740-1224

[Jody@tourismvi.ca](mailto:Jody@tourismvi.ca)

Destination BC Facilitator:

Susan Rybar

(250) 704-4904

[susan@vardocreative.com](mailto:susan@vardocreative.com)

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# 1 Executive Summary

The following tourism plan for the Southern Gulf Islands, including Galiano Island, Mayne Island, Pender Island, Saturna Island and their associated islands, was created based on stakeholder input from individual planning workshops on each island, surveys from stakeholders, pre-workshop research and interviews and information provided in Expression of Interest documents for the Destination BC *Community Tourism Foundations* program as well as other information sources.

The plan that follows is intended to serve as a guide for the Southern Gulf Islands 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.

The vision:

The Southern Gulf Islands are cooperatively branded and are internationally recognized as a year-round marine destination with unique, authentic coastal experiences. The thriving tourism industry supports small business on each island, encouraging a diverse population to remain in the communities, while providing benefits to both residents and visitors in harmony with the ecological and cultural values of island living.

The objectives of the Southern Gulf Islands Tourism Plan are to:

1. Increase visitor volumes, length of stay and spending (specific targets to be determined).
  - Increase length of high season.
  - Growth of shoulder season and mid-week.
  - Increase 3-night stays and repeat visitation.
  - BC Ferries traffic increases in shoulder season.
2. Increase tourism economic revenues to the Southern Gulf Islands.
  - 4-6% growth rate.
  - Increase in viable tourism businesses supporting more full-time employees.

The following identified strategies for the Southern Gulf Islands will support the objectives:

1. Increase awareness of the Southern Gulf Islands as a tourism destination.
2. Utilize a Southern Gulf Islands brand to feature unique islands and iconic products and generate greater appeal of a larger destination area.
3. Position the Southern Gulf Islands as a premier destination for authentic coastal marine activities and experiences.
4. Work in partnership to extend marketing reach and effectiveness.
5. Increase the quality of the visitor experience.
6. Increase the ease of travelling to and around the Southern Gulf Islands.

7. Increase the coordination and cooperation amongst the tourism industry and stakeholders.
8. Secure a stable funding source to consistently enable ongoing tourism development and marketing activities.

There are 12 priority activity areas identified to help achieve the strategies:

#### Tourism Management

1. Tourism Planning and Management
2. Research, Monitoring and Evaluation
3. Communications / Community Relations

#### Branding and Marketing

4. Develop Southern Gulf Islands marketing platform
5. Product Packaging
6. Promotional Tool and Materials
7. Integrated Promotional Mix
8. Marketing Partnerships and Programs

#### Visitor Services

9. Community Welcome

#### Destination and Industry Development

10. Industry and Professional Development
11. Product Development and Enhancement
12. Transportation Infrastructure

## 2 Introduction and Methodology

The following tourism plan for the Southern Gulf Islands, including Galiano Island, Mayne Island, Pender Island, Saturna Island and their associated islands, was created based on stakeholder input from individual planning workshops on each island, surveys from stakeholders, pre-workshop research and interviews and information provided in Expression of Interest documents for the Destination BC *Community Tourism Foundations* program as well as other sources.

Four tourism planning sessions were held: Saturna Island (Feb 17<sup>th</sup>), Pender (Feb 18<sup>th</sup>), Mayne (Feb 18<sup>th</sup>) and Galiano (March 5<sup>th</sup>). The local tourism organizations invited stakeholders and hosted the meetings at local venues. A fifth meeting was held with stakeholders on all islands (May 29). Meeting attendees are documented in Appendix 1.

Destination BC and Tourism Vancouver Island facilitated the four-hour planning sessions that began with overviews of the provincial and regional marketing organizations. The sessions shared and gathered information and insights regarding the following topics:

- Current Market Trends and Local Tourism Planning Context – an examination of the tourism industry globally, federally, provincially, regionally and locally.
- Target markets – the type of visitors the destination is aiming to attract (demographics and key markets).
- Local Products and Services – the core experiences that the destination offers to visitors; what makes the community unique compared to neighbouring destinations; what has changed recently.
- Tourism organizations and marketing efforts – a review of the stakeholders involved in the marketing initiatives currently being undertaken.
- SWOT – strengths, weaknesses, opportunities and threats. What should the destination focus on, what needs improving that we have some control over, what are the opportunities to undertake, what are the threats that we need to be aware of but do not have control over.
- Vision, objectives, and priorities - the prioritized list of goals that will determine the key strategies for the next 12-18 months.

The plan that follows is intended to serve as a guide for the Southern Gulf Islands 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.

### 3 Tourism Strategic Planning Process

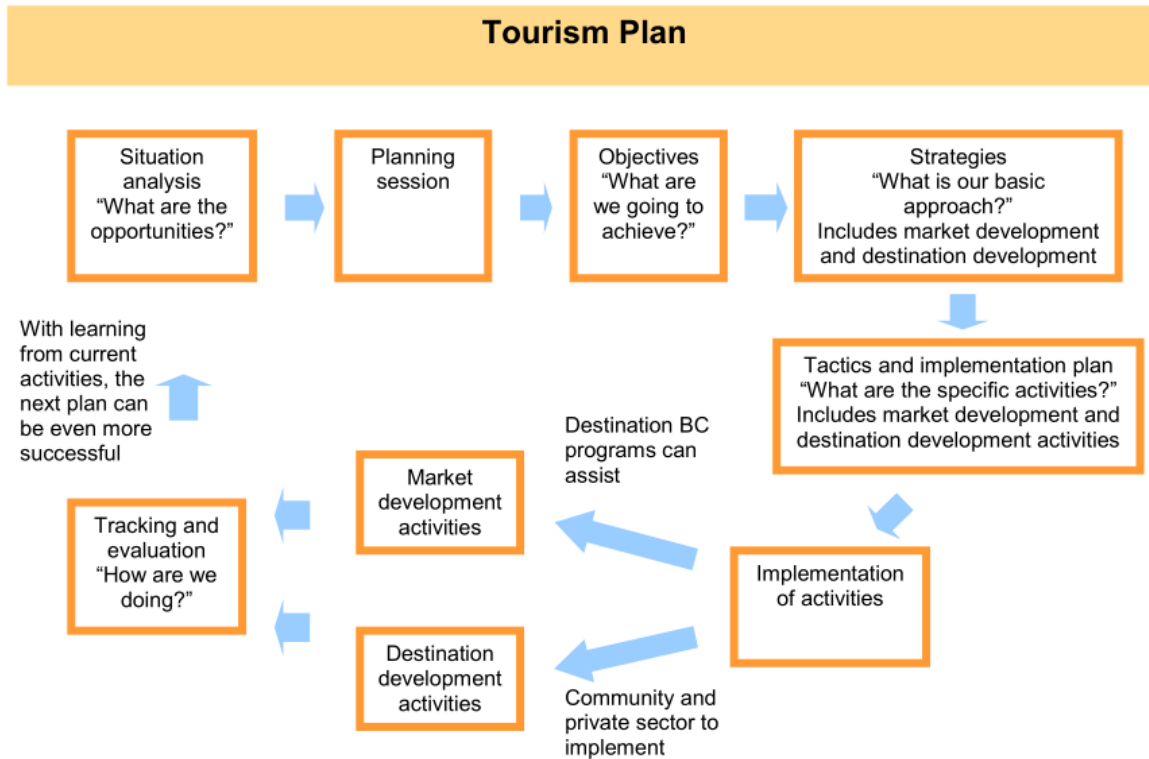
A Strategic Tourism Plan answers the key questions:

- What business objectives related to tourism does the community expect to achieve?
- What type of tourism does the community want to achieve? In the short term? Over the longer term?
- How will the community achieve these objectives? Through what tourism products? Through what type of visitors? Through which marketing initiatives?

In preparation of the Tourism Plan, the following principles were considered:

- Visitor Needs. BC communities must be responsive to the needs of visitors. Communities need to understand visitor needs first, develop tourism experiences to meet those needs, and then market the appropriate tourism experience to the appropriate type of visitor.
- Inclusiveness. To address the issues and opportunities facing the tourism industry, consultation and collaboration across all areas of the province and all levels of the tourism industry need to form the basis of plan development.
- Effective partnerships. Tourism can be a fragmented industry and effective partnerships among tourism operators, sectors, destination marketing organizations, educational institutions, and all levels of government are essential to building a cohesive, strong and sustainable industry in BC.
- Sustainability. Tourism in BC will be developed in a sustainable manner, recognizing the need for economic, social and environmental sustainability.
- Community Support. To be successful, tourism development in communities needs to be supported by all areas of a community, including businesses, local government and residents.

Once the tourism plan is completed and implementation begins, results should be tracked regularly such that an updated plan, with learning from the current year's activities, can be even more effective in increasing benefits to the community. The objectives and strategies should be reviewed, with most of the updates occurring on the detailed tactics. The planning cycle can be illustrated as follows:



## 4 Southern Gulf Islands Planning History

Strategic planning for the Southern Gulf Islands has been undertaken in various ways. The following recaps some of the more recent and significant planning projects.

### Islands Trust

The Islands Trust Areas were created in 1974 under the Islands Trust Act. The Islands Trust has responsibility for conservation through land use planning, regulation and stewardship. Local trust committees, who adopt Official Community Plan and land use bylaws for each local trust area, carry out the policies expressed in the Islands Trust Policy Statement.

At the regional level, the Islands Trust Council is responsible for creating the Islands Trust Policy Statement that guides the content of the Official Community Plans (OCPs) and land use regulations through the Islands Trust Area. Each term, a strategic plan is adopted to focus efforts in priority areas related to the goals of the Policy Statement and an annual budget supports planned activities.

When reviewing the OCP documents from each island some common themes emerge:

- A sustainable community requires a viable local economy.



- There is a recognized need for local economic development and viable small enterprises supporting a diversity of livelihoods. At the same time, it is recognized that there are limits to economic and population growth determined by the islands' finite boundaries, resources, and ecosystems.
- Restrictions exist for accommodation based on size and density to ensure visitor accommodations do not adversely affect the natural environment.
- Developments should be designed to provide opportunities for residents and visitors to enjoy.

Local Trust Committees will be more likely to support tourism planning efforts that:

1. Maintain the rural ambience of the area; islanders have chosen space, privacy and aesthetic qualities over urban conveniences.
2. Provide adequate infrastructure for tourist activities.
3. Ensure tourism use that is environmentally, economically and civically sustainable, and within the capability of the community's volunteer base that supports or provides most local services and resources.

At the 2004 UBCM Convention, the creation of a new Community Tourism Program to support tourism development at the local and regional levels was announced. The primary goal of providing this one-time \$25 million grant was to assist local governments in increasing tourism activity. In 2005, the Islands Trust hosted a forum focused on managing development in the trust area and tourism was flagged as an important topic for further discussion. In March 2006, the Islands Trust hosted a community forum where a group of panelists, including representatives from other local governments, the tourism industry, tourism planning experts and the academic community suggested options and solutions to the issues identified by participants. The Islands Trust hired a contractor to summarize the findings of the forum and develop an initial community tourism planning strategy entitled *An Initial Tourism Planning Strategy for the Islands Trust Area*.<sup>1</sup> High level findings are included on page 28 of this plan.

### **Capital Regional District**

In April 2008, the Capital Regional District (CRD) produced the Southern Gulf Islands Community Tourism Study consisting of three components: Part 1 – Tourism Profile; Part 2 – Strategic Analysis; Part 3 – Opportunities Outline.

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<sup>1</sup> <http://ebookbrowse.net/initialtourism-pdf-d1946161>



Part 1 provides a summary review and inventory of current visitor-related infrastructure, an overview of local visitor market trends, and a preliminary analysis of the general benefits and costs of tourism in the area. The Tourism Profile determines that tourism, or the visitor industry as it is more commonly referred to in this study, is one of the study area's principal industries and local economic drivers.

Part 2 outlines nine tactics that could be undertaken to help create a more balanced, year-round visitor industry in the Southern Gulf Islands and to help mitigate the impacts resulting from peak summer activity levels. The nine tactics were: development of a strategic plan, creation of a visitors bureau (Destination Marketing Organization), creating a Visitor Code of Conduct, implementing the Additional Hotel Room Tax, launching a social marketing campaign, coordinating marketing with key agencies, developing a Buy Local campaign, developing off-season events, and instituting a water conservation program. Based on feedback from the steering committee and ranking the possible tactics against the community tourism goals, it was decided to bundle several together and develop a plan for a Visitor Awareness and Education Campaign.

Part 3 outlines the steps involved in implementing the Visitor Awareness and Education Campaign.

### **Experience the Gulf Islands**

Experience the Gulf Islands (ETGI) is an initiative of the Southern Gulf Islands Economic Development Commission that aims to build amenities for island residents and draw specialized tourism visitors to the islands. A key building block of ETGI will be the development of a system of major trails and water routes interconnecting the Southern Gulf Islands and Salt Spring Island.

ETGI proposes to extend the Experience the Fraser trail system on to the gulf islands and link the islands to the Lochside and E&N trails of the southern Vancouver Island. It is proposed that it will be designated as the Islands in the Salish Sea Destination Loop of the Trans Canada Trail.

The primary goal of the proposed project is for “Community and Economic Development: Reconnect the communities of the southern gulf islands, rekindling and revitalizing their historical social relationships, and building sustainable economies”. Other goals include: Infrastructure Development, Safety and Inter-Island Transportation; Outdoor Recreation, Health and Wellness; First Nations; Interpretation and Education; Community Engagement; Geotourism; Conservation and Protection; Partnership Development; and Celebration (cultural events, festivals and arts).

The plan is currently in the proposal stage, and significant resources will be required to implement. Key components for success have been identified as: Coordination and planning, partnerships, access and tenure, capital development, federal and provincial infrastructure cooperation, and support programs for operations and maintenance. There is a need to coordinate the tourism planning for the Southern Gulf Islands and Salt Spring Island to ensure ETGI is integrated into both destination plans.

In addition to the trail network, Welcome Centres on each island and an internet presence (Islands in the Salish Sea Online Portal) have been identified as opportunities.

## 5 Situation Analysis

### 5.1 Key Insights

The following key insights were developed based on the Situation Analysis, to follow.

Overall, the tourism sector is seeing positive growth globally, in Canada and in BC, but BC faces challenges to fully capitalize on the growth potential.

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 the Southern Gulf Islands to participate fully in the digital space to maximize opportunities to generate awareness and interest.

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 the Southern Gulf Islands as a travel destination.

The increasing interest in activities that facilitate relaxation, rejuvenation and tranquility is a trend that aligns to the key motivator for visiting rural communities and islands and could be leveraged to attract new markets or increased visitation.

Consumers continue to look for value for money, yet cost/the perception of it being too expensive is cited as a key reason for those who are unlikely to take a trip to the Vancouver Island region (including Gulf Islands). Cost perceptions should be addressed.

Transportation is a key barrier for travel to the islands, and a significant threat, and as such, efforts should be applied to positively influence BC Ferries and other transportation options. Promoting the benefits of ferry travel, in partnership with BC Ferries should be examined.

The strongest market for Southern Gulf Islands is the near-in markets (1-2 hours), with BC residents being the top market.

Visitors to BC and the Vancouver Island region (including the Gulf Islands) are motivated by and participate in the types of experiences and activities that the Southern Gulf Islands have to offer. In particular, nature (e.g., parks) and outdoor activities (e.g., hiking) are key drivers.

A review of the available research reveals a need for more information about visitors to the Southern Gulf Islands specifically. Research will assist with evolving marketing plans and decision making.

The Southern Gulf Islands have an abundance of product experiences, many of which are similar in nature to other BC and Pacific Northwest Coastal coastal destinations. The selection of iconic experiences to feature and highlight may be valuable to create unique island brands as well as help set the Southern Gulf Islands apart from other options.

There are currently limited efforts in marketing collectively as a destination. Opportunities exist to collaborate and leverage resources to expand marketing reach and increase effectiveness.

There is a desire to see significant tourism growth to support the island economies and livelihood. There is sense of urgency in reversing years of decline before further erosion negatively impacts existing businesses, residents and visitors.

There are currently limited resources (time, money) from which to manage and execute a new tourism plan. Funding opportunities need to be explored to ensure the plan can be executed and is successful.

Southern Gulf Islands have a long planning history for economic development and tourism. It is important this plan respects the existing supported plans (e.g., Experience the Gulf Islands) and works to ensure collaborative efforts.

## 5.2 Operating Environment

### 5.2.1 Economic Outlook

The International Monetary Fund (IMF) reports <sup>2</sup> that the global economy strengthened in the second half of 2013, with global activity and world trade picking up. Global growth is projected to be slightly higher for 2014, at around 3.7% and then rising to 3.9% in 2015. However, downward revisions to

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<sup>2</sup> Source: World Economic Outlook, IMF, October 2013

growth forecasts in some economies highlight continued fragilities. Canada's World Output year over year growth was 1.7% in 2013 with projections for 2.2% in 2014 and 2.4% in 2015.

### 5.2.2 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 topping 1 billion in 2012. 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.

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 America's will show lower-than-average growth rates.<sup>3</sup> The latest numbers released by the UNWTO exceeded expectations: international tourist arrivals grew by 5% in 2013. For 2014, UNWTO forecasts 4% to 4.5 % growth – again, above the long-term projections.<sup>4</sup>

The increase in the number of potential travelers is fuelled by more consumers around the world —in particular baby boomers and emerging markets such as China, India, Russia and Brazil — having the resources and inclination to travel. China, India, Mexico and Brazil have been identified as emerging markets for BC. The top 10 destinations by International Arrivals and Receipts shows Canada generated 16 million arrivals in 2012 (visitor volume) and \$17 billion in receipts (visitors spending)(Figure 1).

**Figure 1: Top 10 Destinations by International Arrivals and Receipts**

Arrivals	Millions	% chg (11-12)	Receipts	US \$Billions	% chg (11-12)
1. France	83	2%	1. US	\$126	9%
2. US	67	7%	2. Spain	\$56	1%
3. China	58	<1%	3. France	\$54	7%
4. Spain	58	3%	4. China	\$50	1%
5. Italy	46	1%	5. Macao	\$44	13%
6. Turkey	36	3%	6. Italy	\$41	4%
7. Germany	30	7%	7. Germany	\$38	6%
8. UK	29	<-1%	8. UK	\$36	5%
9. Russia	26	13%	9. Hong Kong	\$32	16%
10. Malaysia	25	1%	10. Australia	\$32	<-1%
Canada	16	2%	Canada	\$17	n/a

Source: UNWTO<sup>5</sup>

### Tourism Competitiveness

<sup>3</sup> Source: UNWTO *Tourism Highlights* (2013) report <http://mkt.unwto.org/publication/unwto-tourism-highlights-2013-edition>

<sup>4</sup> Source: <http://media.unwto.org/press-release/2014-01-20/international-tourism-exceeds-expectations-arrivals-52-million-2013>

<sup>5</sup> Note: The UNWTO calculates the growth rate in tourism receipts based on local currencies, not the receipts in \$US, due to fluctuations in relative exchange rates.

The World Economic Forum (WEF) Travel and Tourism Competitiveness Report is published every two years and ranks the tourism sectors of 140 countries in terms of 14 pillars of competitiveness. Together these constitute the Travel and Tourism Competitiveness Index (TTCI), which is a measure of the factors and policies that make it attractive to develop the travel and tourism sector in different countries.

The 2013 analysis <sup>6</sup> finds that Canada's competitive position improved to eighth overall, a gain of one position over 2011. The strengths driving Canada's competitive advantage include rich natural resources, highly qualified human resources, cultural resources and air transport infrastructure. Of particular concern, however, are the noted weaknesses placing Canada at a competitive disadvantage:

- **Visa requirements** - The report finds Canada's visa requirements are increasingly uncompetitive, slipping from 72nd in 2009 to 106th in 2013. While the USA is even more restrictive and ranked 121st in 2013, the UK ranked 46th, one of the highest among advanced economies.
- **Price competitiveness** - 124<sup>th</sup> and slipping from 105<sup>th</sup> in 2011. Two factors in particular are driving this result:
  - Ticket taxes and airport charges – Canada's are among the highest in the world (136<sup>th</sup> of 140 countries) and pose a significant barrier to the competitiveness of the tourism industry by making both domestic and international travel to the country more expensive for visitors.
  - Purchasing power parity – ranked 131<sup>st</sup>.

### 5.2.3 Consumer Shifts and Trends

The following consumer shifts have impacted the travel industry:

- There is expected to be increasing competition for the global tourist dollars as more destinations are seeing the economic benefits of tourism and are aggressively trying to attract travellers. The generation of global wealth is shifting east and south, driven by Asia's growth. Rapid income growth in emerging economies will create new travel markets. Also developing countries, particularly China, are investing heavily in tourism infrastructure to become stronger competitors for established destinations.
- Nature will be increasingly valuable in a world with rapidly urbanizing populations and disappearing natural habitats.
- As people become wealthier and can meet more of their daily needs, they seek experiences over goods. Travellers are increasingly seeking memorable experiences that are authentic, personalized and involve social and cultural interaction. Also, there is a growing demand for backpacker travel among the developing Asia markets.
- Tourism is highly sensitive to extreme events, such as political conflict, natural disasters, financial shock and pandemics. Extreme weather and infectious disease outbreaks are more likely as the climate changes, and drug resistance and human mobility increases. Perceptions of safety are often destination-dependent and people may switch destinations rather than cancel

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<sup>6</sup> Source: Office of Strategy Management & Research, Canadian Tourism Commission, April 2013

their travel plans. Early warnings systems and efficient recovery plans demonstrate to travellers that BC and Canada are safe destinations.

- 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 changing bookings very quickly. Despite all the digital opportunities, face-to-face interactions remain paramount. While today's older travellers are less likely to use the internet and mobile devices, this may change radically in the next 10 years as computer-literate travellers use technology to enhance all aspects of travel, from trip planning to in-destination experiences to ongoing relationships with tourism operators.
- As the Path to Purchase changes, destinations need to provide travel prospects a wide variety of types of travel information through many different channels. Different prospects are at different stages of travel decision-making, and different people require different information. Awareness and inspiration occur mostly through traditional media, and trip planning through on-line web sites and traveller review sites. Social networks are still an occasional planning tool for most, but are growing in importance among younger travellers.
- 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, and migration linkages increasingly play an important role in motivating trips. The aviation industry plays a central role in global mobility but is highly dependent on the availability and cost of fossil fuels.
- Changing demographics with the aging baby boomers and increase in middle class from many overseas markets. Individual incomes have risen in most countries, making more products and services affordable and changing people's attitudes towards work and leisure. Globally, total working hours have declined leaving people with more time for leisure, travel and personal development. Despite this increase in available leisure time overall, the pressure of time has become a key constraint on what people can do.
- The UNWTO World Values Survey found more individuals, typically in the younger generations, see themselves as 'global citizens'; there is an increasing engagement with international development and aid across all age groups while awareness of and concern for the environment has risen around the globe; adventure-seeking has grown in developed countries, predominantly among younger generations (as people age, they tend to be more risk averse, but healthier older people may still seek adventure).
- Consumers are becoming more sophisticated travellers, with a corresponding increase in the expectations of quality service delivery.
- Shorter trip planning cycles continue to be a trend, however, there is also a more recent trend of a return to longer trip planning cycles as was seen pre-recession in 2008.
- Consumers continue to look for value for money, booking shorter trips and less expensive travel options. Conversely, some analysis reports an increase in luxury travel; however, this could be a

return to market from pre-2008 levels. The higher price tag may confer a higher status and cachet in the eyes of international travellers.

- Interest has grown for multiple activities and experiences packaged as a complete itinerary.<sup>7</sup>

#### 5.2.4 BC Tourism Environment

Tourism is also a critical sector within BC's economy<sup>8</sup>:

- In 2012, the tourism industry generated \$13.5 billion in revenue, a 2.5% increase from 2011, and a 40.5% increase from 2002.
  - \$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.
- Tourism-related provincial tax revenue generated \$1.2 billion in 2012, an increase of 4.7% over 2011, and of 72.6% since 2002. This increase since 2002 was due to the growth of the tourism industry and to consumer taxes, such as the Harmonized Sales Tax (HST).
- The tourism industry contributed \$7.1 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 1.5% growth over 2011 and 4.4% growth since 2007. In 2012, tourism contributed more to GDP than the forestry and agriculture and fish primary resource industries but less (65.8%) than the mining, oil and gas extraction industry.
- In 2012, there were 18,387 tourism establishments in BC employing 127,300 people. In 2012, the tourism industry paid \$4.3 billion in wages and salaries, up from 4.0% in 2011 and a 30.5% increase since 2002.

#### 5.2.5 Provincial, Regional and Local Context

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.

- Within North America the **fragile economic recovery** from the 2008 global recession and resulting fluctuations in consumer confidence continue to impact travel, however some analysis is reporting a return to pre-recession travel and decision-making patterns.
- The **general decline in visitations from the US** travel market to BC continues to impact many BC destinations. Budget cuts from the Canadian Tourism Commission led to reduced marketing activities in the US market. In December 2013 they announced some reinvestment in 2014.
- **Border security and visa requirements**/administration processes continue to provide challenges with facilitating quick, easy crossing through Canadian borders.

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<sup>7</sup> Destination BC – *UNWTO: Demographic Change and Tourism 2011*

<sup>8</sup> Destination BC, Value of Tourism 2012 [www.destinationbc.ca/getattachment/Research/Industry-Performance/Value-of-Tourism/Value-of-Tourism-in-British-Columbia-\(2012\)/2012-Value-of-Tourism\\_Full-Report\\_recent.pdf.aspx](http://www.destinationbc.ca/getattachment/Research/Industry-Performance/Value-of-Tourism/Value-of-Tourism-in-British-Columbia-(2012)/2012-Value-of-Tourism_Full-Report_recent.pdf.aspx)



- There are continued challenges with ensuring **affordable, convenient air access** to and throughout BC. A fluctuating dollar and the relatively high cost of BC as a destination continues to present challenges as consumers shift to destinations and travel experiences that offer more compelling value.
- **Increasing gas prices** impact consumer travel decisions.
- There are continued challenges with **increasing BC Ferries fares**; declining ridership and potential changes to route schedules.
- 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, 71,000 job replacements. See [www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx](http://www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx)
- There has been a growth in the awareness and availability of **aboriginal tourism experiences** throughout BC, with efforts led by Aboriginal Tourism Association BC (AtBC).
- **Custom entries from the US** to BC by private boat have experienced a significant decline in recent years. The number of U.S. residents entering BC by private boat declined by an average annual rate of just under 6% between 2007 and 2011.<sup>9</sup>
- In general, there has been **an increase in the number of destinations throughout BC** looking to tourism to increase their local economy. As a comparison, the following Vancouver Island destinations have over \$400,000 budgets: Parksville Qualicum Beach Tourism, Tourism Tofino, Tourism Ucluelet, Tourism Nanaimo, Tourism Victoria (may be others, not all budgets are public).<sup>10</sup>

### The Southern Gulf Islands

The Southern Gulf Islands are an island archipelago located in the protected waters of Georgia Strait between Vancouver Island and the Lower Mainland of B.C. The four islands that are part of this tourism planning process include Galiano, Mayne, Pender (North and South) and Saturna. This area is rich in human cultural heritage. Archaeological records document more than 3,000 years of aboriginal use and occupancy of the islands and the historic buildings and farmsteads of early colonial settlers can still be found.<sup>11</sup>

The 2011 Census of Canada reports that the median age for the Southern Gulf Islands electoral area is 59.7 compared to the median age for the Capital Regional District at 44.8 years. The population of the Gulf Islands increased 2.4% from 14,741 in 2006 to 15,102 in 2011.<sup>12</sup>

<sup>9</sup> Experiences BC Power and Sail Cruise Sector Tourism Plan, final March 18, 2013, Destination BC

<sup>10</sup> Ministry of Jobs, Tourism and Skills Training Tourism Activity Summary (2012); Tourism Industry Association of Canada

<sup>11</sup> Initial Tourism Planning and Policy Strategy for the Islands Trust Area (Islands Trust, British Columbia)

<sup>12</sup> Capital Regional District <https://crd.bc.ca>

The economy of the Southern Gulf Islands as a whole has a very low level of dependence on resource industries in comparison to the non-metropolitan B.C. economy as a whole (2%, compared to 22%). The proportion of economic income generated by tourism and agriculture in the Southern Gulf Islands (7% and 2% respectively) is similar to the non-metropolitan provincial averages. In comparison to other non-urban areas, the islands are disproportionately dependent upon private, non-employment income, primarily private investment income and private pensions (one-third of economic income is derived from these sources).<sup>13</sup>

### **BC Ferries**

The Southern Gulf Islands rely heavily on the BC Ferries for both local resident and visitor transportation. As such, a review of BC Ferries service is provided here.

In 2012/2013, BC Ferries reported the lowest vehicle numbers in 14 years and the lowest passenger volume in 22 years. While reduced ridership may be partially attributable to higher prices, toll-free inland ferries in B.C. are experiencing similar ridership declines, suggesting that other factors are at play. A community engagement process was conducted in late 2013 and medium-term plans were proposed for feedback including: reducing the senior's discount, implementing a gaming pilot project, introducing loyalty programs and new time-of-day pricing initiatives, considering supplemental private passenger-only service and initiating service reductions to address the provincial objective of \$18.9 million in net savings to be achieved by 2016.<sup>14</sup>

A review of BC Ferries vehicle statistics specific to the Southern Gulf Islands shows generally declining volume from both Tsawwassen and Swartz Bay terminals and throughout the Southern Gulf Islands terminals. Departures from Swartz Bay (to Mayne, via Pender, Saturna and Galiano) on route 5 were 123,633 in 2010 vs. 112,738 in 2014; from Tsawwassen (to Mayne via Salt Spring, Pender and Galiano) on route 24 were 78,350 in 2010 vs. 67,269 in 2014 (Figure 2,3).<sup>15</sup>

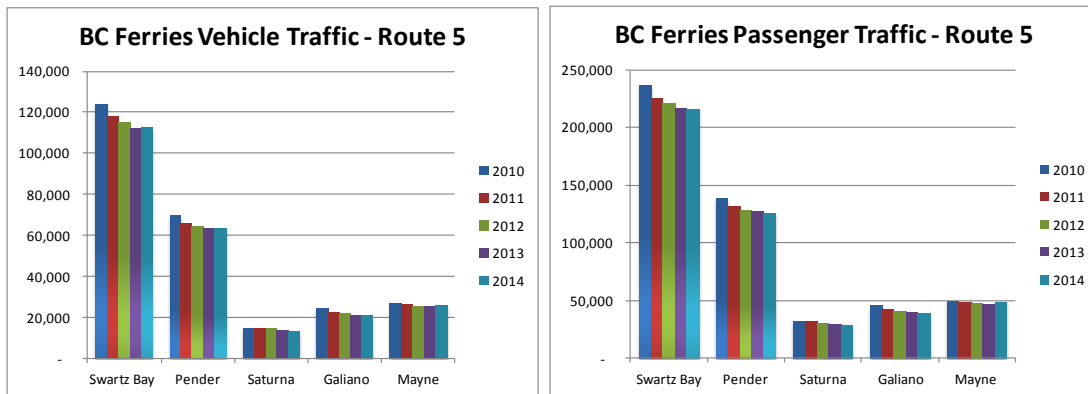
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<sup>13</sup> Islands Trust North Pender Island Official Community Plan  
[www.islandstrust.bc.ca/lrc/np/pdf/npbylbaseocp0171.pdf](http://www.islandstrust.bc.ca/lrc/np/pdf/npbylbaseocp0171.pdf)

<sup>14</sup> BC Coastal Ferries Community Engagement, November–December 2013, *Engagement Summary Report* February 2014. [http://coastalferriesengagement.ca/documents/2013/2013\\_SummaryReport.pdf](http://coastalferriesengagement.ca/documents/2013/2013_SummaryReport.pdf)

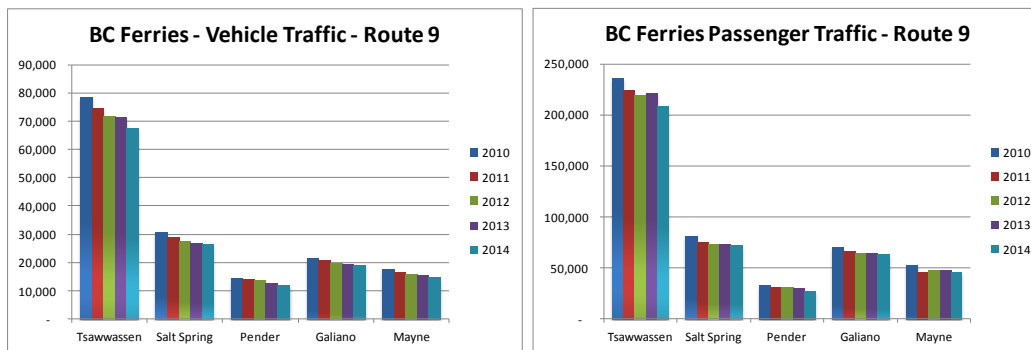
<sup>15</sup> BC Ferries - BC Ferries Traffic Statistics (based on fiscal year April–March) [www.bcferries.com/about/traffic.html](http://www.bcferries.com/about/traffic.html)

**Figure 2: BC Ferries Traffic Embarkments - Route 5, 2010-2014**



Source: BC Ferries Traffic Statistics, March 2010- March 2014 (fiscal year)

**Figure 3: BC Ferries Traffic Embarkments - Route 9, 2010-2014**



Source: BC Ferries Traffic Statistics, March 2010-March 2014 (fiscal year)

In contrast, both vehicle and passenger peak rates have increased between April 2008 and Jan 2014:

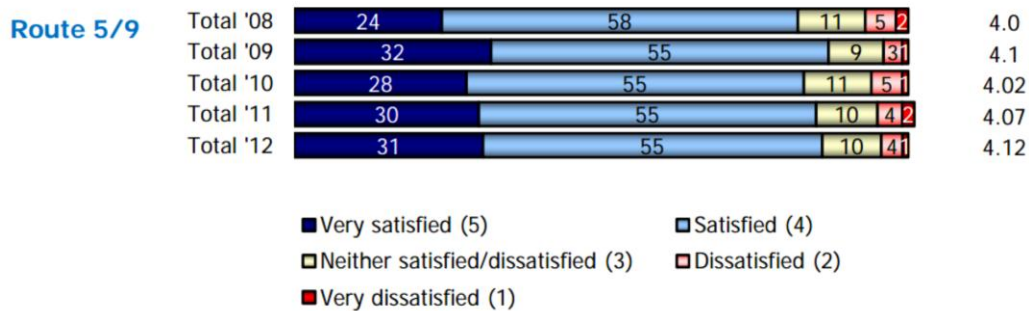
- Swartz Bay to Southern Gulf Islands Passenger: \$9.35 (2008) vs. \$12.00 (2014)
- Swartz Bay to Southern Gulf Islands Vehicle: \$31.35 (2008) vs. \$37.95 (2014)
- Tsawwassen to Southern Gulf Islands Passenger: \$14.05 (2008) vs. \$17.85 (2014)
- Tsawwassen to Southern Gulf Islands Vehicle: \$51.50 (2008) vs. \$57.05 (2014)

The total cost for a car and two passengers between Swartz Bay and the Southern Gulf Islands has risen from \$50.05 in 2008 to \$61.95 in 2014, an increase of 19.2%. The total cost for a car with two passengers between Tsawwassen and the Southern Gulf Islands has increased from \$79.60 in 2008 to \$92.75 in 2014, an increase of 14.2%.

The cost of the Southern Inter-Gulf Islands has changed from \$5.00 passenger and \$10.50 vehicle in 2008 to \$6.00 and \$13.10 respectively in 2014.

Despite the decrease in traffic and increase in rates, the BC Ferries Customer Satisfaction Levels shows marginal increases between 2008 and 2012, from 4.0% average to 4.12% average respectfully (Figure 4).

**Figure 4: Overall Satisfaction Level with Recent Experience Travelling with BC Ferries (%)**



Source: Customer Satisfaction Tracking Annual Report 2012, BC Ferries

Effective April 1, 2014 BC Ferries will make service adjustments and reductions throughout the ferry schedule. For the Southern Gulf Islands on the Swartz Bay route (Route 5) there are no service changes. For the Tsawwassen route (Route 9), which has an annual utilization rate of 42.2 per cent, there will be no round trip reductions, but the route is subject to a schedule change.

The following chart shows that for Route 5, there is significant vehicle capacity during the off-peak season, with also some capacity available during the peak season, depending on day and sailing time (Figure 5).

**Figure 5: BC Ferries Average of Vehicle Utilized Capacity (%) – Route 5, 2011/12**



The following chart shows for Route 9 there is significant vehicle capacity in the off-peak season, with some vehicle capacity in the peak season, depending on day of week and sailing (Figure 6).

**Figure 6: BC Ferries Average of Vehicle Utilized Capacity (%) – Route 9, 2011/12**

Route 9: Tsawwassen – Southern Gulf Islands				Sailing to Southern Gulf Islands	
Season	Departure Terminal	Route	Day	1	2
Peak	Tsawwassen	9	SUN	45.6%	23.1%
			MON	68.8%	26.3%
			TUE	72.9%	43.4%
			WED	73.1%	54.1%
			THU	83.1%	82.5%
			FRI	93.9%	74.6%
		SAT	68.3%	11.4%	
		9a	SUN	45.8%	51.0%
			MON	69.4%	43.5%
			THU	91.9%	88.3%
			FRI	102.3%	105.7%
			SAT	77.4%	60.2%

Route 9: Tsawwassen – Southern Gulf Islands				Sailing to Tsawwassen	
Season	Departure Terminal	Route	Day	1	2
Peak	Southern Gulf Islands	9	SUN	55.9%	74.7%
			MON	71.3%	88.6%
			TUE	60.5%	78.1%
			WED	55.2%	69.8%
			THU	53.6%	66.6%
			FRI	45.2%	28.6%
		SAT	27.2%	49.9%	
		9a	SUN	77.8%	81.4%
			MON	94.1%	48.5%
			THU	84.0%	24.9%
			FRI	84.3%	16.4%
			SAT	73.2%	20.4%

Route 9: Tsawwassen – Southern Gulf Islands				Sailings	
Season	Departure Terminal	Route	Day	1	2
Off-Peak	Tsawwassen	9	SUN	37.1%	14.3%
			MON	39.4%	22.8%
			TUE	33.4%	26.2%
			WED	33.3%	33.1%
			THU	46.5%	59.4%
			FRI	64.4%	47.4%
			SAT	37.5%	16.2%
	Southern Gulf Islands	9	SUN	40.6%	54.8%
			MON	52.7%	58.9%
			TUE	42.4%	40.4%
			WED	36.1%	34.6%
			THU	36.5%	41.0%
			FRI	33.6%	16.5%
			SAT	17.6%	32.9%

< 10%
10% – 19%
20% – 39%
40% – 59%
60% – 79%
80% – 100%
> 100%

Source: Coastal Ferries Engagement Discussion Guide.<sup>17</sup>

The following organizations have the ability to impact tourism in the Southern Gulf Islands. As such, an overview of each is provided for context.

### Parks Canada - Gulf Islands National Park Reserve

Established in 2003, Gulf Islands National Park Reserve (GINPR) safeguards a portion of British Columbia's beautiful Southern Gulf Islands archipelago. These islands are representative of the Strait of Georgia Lowlands, one of the most ecologically at risk natural regions in southern Canada. This small park reserve includes thirty-six square kilometres of land and marine area on fifteen islands, numerous islets and reefs which provide valuable habitat for seals and nesting shorebirds. Additionally twenty-six square kilometres of submerged lands are also administered for national park purpose.<sup>18</sup> The national park reserve protects and presents the natural and cultural heritage as well as providing a range of visitor experiences.

In 2012 the federal government announced \$29 million in cuts from the Parks Canada budget, which resulted in 638 jobs being declared surplus.<sup>19</sup> Future impacts to the GINPR are unknown.

<sup>16</sup> Note: Route 5 involves multiple port stops on some sailings. This table shows average utilization leaving from and arriving at Swartz Bay. It is not intended to measure usage as it does not include traffic travelling between the intermediate ports of call that do not travel through Swartz Bay.

<sup>17</sup> Note: Route 9 involves multiple port stops on some sailings. This table shows average utilization leaving from and arriving at Tsawwassen. It is not intended to measure usage as it does not include traffic travelling between the intermediate ports of call that do not travel through Tsawwassen.

<sup>18</sup> Parks Canada [www.pc.gc.ca/pn-np/bc/gulf/index.aspx](http://www.pc.gc.ca/pn-np/bc/gulf/index.aspx)

<sup>19</sup> CPAWS, [http://www.cpaws.org/uploads/pubs/parks/cpaws\\_parksreport\\_2012.pdf](http://www.cpaws.org/uploads/pubs/parks/cpaws_parksreport_2012.pdf)

## The Islands Trust

The Islands Trust Area was created in 1974 under the Islands Trust Act. The Islands Trust Area covers the islands and waters between the British Columbia mainland and southern Vancouver Island, including Howe Sound and as far north as Comox. The area is composed of 13 major islands and more than 450 smaller islands covering approximately 5200 square kilometres of land and water. Approximately 25,000 people live on these islands.

The Islands Trust has responsibility for conservation through land use planning and regulation and for leadership in stewardship – voluntary, cooperative actions that nurture and take responsibility for the long-term integrity of the environment and amenities of the Trust Area. The Islands Trust seeks to integrate ecosystem preservation and protection, sustainable communities and stewardship of resources.

The Islands Trust achieves its mandate in several ways, with programs at both the local and the regional level:

- Local trust committees, who adopt Official Community Plan and land use bylaws for each local trust area, carry out the policies expressed in the Islands Trust Policy Statement.
- At the regional level, the Islands Trust Council is responsible for creating the Islands Trust Policy Statement that guides the content of the Official Community Plans and land use regulations through the Islands Trust Area. Each term, it adopts a strategic plan to focus efforts in some priority areas related to the goals of the Policy Statement and adopts an annual budget to support planned activities. As the land conservation arm of the Islands Trust, the Islands Trust Fund also works at the regional level, helping island communities to protect special places throughout the Islands Trust Area. It accepts donations, grants and bequests of money, land and covenants in order to preserve and protect significant natural and cultural features in the Trust Area.<sup>20</sup>

## 5.3 Visitor Analysis

### 5.3.1 BC Visitors

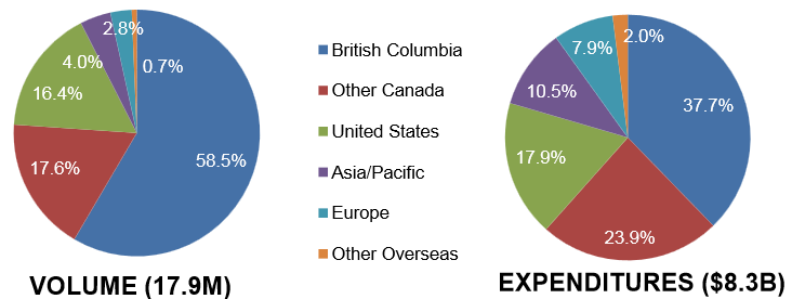
In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent \$8.3 billion, a decline of 2.4% from 2011<sup>21</sup>. Over half of the visitors (58.5%) were British Columbia residents (Figure 7). Visitors from other parts of Canada accounted for 17.6 % of all visits, while international visitors accounted for the remaining 23.9% of visitor volume. However, international visitors accounted for 38.4% of visitor expenditures. British Columbia residents accounted for 37.7% and Canadian residents accounted for 23.9% of visitor expenditures.

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<sup>20</sup> Islands Trust [www.islandstrust.bc.ca/connect/about-us.aspx](http://www.islandstrust.bc.ca/connect/about-us.aspx)

<sup>21</sup> Source of domestic data: Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC).

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



Source: The Value of Tourism in British Columbia February 2014, Destination BC

For all travellers in BC (business and leisure), the Vancouver Island region (including the Gulf Islands) received 22% of all overnight visitors, 19% of spending and 20% of nights (Figure 8). When looking at just leisure travellers, the Vancouver Island region received 21% of overnight visitors, 20% of spending and 21% of nights.

**Figure 8: Travel Characteristics by Region, 2010**

#### Regional comparisons

Travel characteristics by region	*Overnight visitors (000s)	Total *Spending (\$000s)	Nights (000s)	% change (2009-2010)			Regional share of total		
				Overnight visitors	Spending	Nights	Overnight visitors	Spending	Nights
All travellers in BC	15,729	\$8,070,235	74,216	6%	3%	3%			
Cariboo Chilcotin Coast	484	\$105,301	1,835	15%	-1%	8%	3%	1%	3%
Kootenay Rockies	1,581	\$521,582	5,679	-1%	-1%	-2%	9%	7%	8%
Northern BC	919	\$383,027	3,575	5%	-4%	-9%	5%	5%	5%
Thompson Okanagan	3,309	\$1,098,024	11,932	2%	-6%	-4%	19%	14%	17%
Vancouver, Coast & Mountains	7,182	\$4,086,981	34,703	11%	10%	9%	42%	54%	48%
Vancouver Island	3,736	\$1,435,306	14,577	4%	-0.1%	5%	22%	19%	20%
Leisure travellers in BC	8,286	\$4,565,658	36,009	4%	2%	3%			
Cariboo Chilcotin Coast	280	\$75,405	1,252	7%	-0.2%	14%	3%	2%	4%
Kootenay Rockies	1,072	\$401,642	3,826	-4%	-0.2%	-2%	12%	9%	11%
Northern BC	442	\$204,415	1,839	12%	-4%	-2%	5%	5%	5%
Thompson Okanagan	1,799	\$727,122	6,545	3%	-3%	-1%	19%	17%	19%
Vancouver, Coast & Mountains	3,669	\$2,066,686	13,787	9%	10%	8%	40%	47%	40%
Vancouver Island	1,975	\$876,645	7,462	0.1%	-2%	3%	21%	20%	21%

\*Please note the visitation of all regions will not equal the provincial total as travellers can visit multiple regions on one trip and the spending of all regions will not equal the provincial total as the "unspecified" region is not included in the table.

Source: Vancouver Island Regional Profile, April 2013, Destination BC

As BC and Other Canadian travellers are the majority of the market, the following travel characteristics have been provided:

- On average, BC residents spent just over three nights during a trip in their home province while Canadian residents spent over five nights during a trip in BC.

- Travel party size was generally consistent for BC and other Canadian residents, averaging 1.6 people per party.
- Generally, about 15% of travel parties included children under 18 years of age.
- BC residents spent an average of \$134 per travel party per night during their trip while other Canadian residents spent \$154 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). Other Canadian residents spent \$154 per party per night, on average.<sup>22</sup>

### 5.3.2 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:

- The Vancouver Island region received 3.7 million overnight person-visits in 2010 and generated \$1.4 billion in related spending. Domestic overnight travellers accounted for 73% of visitation and 61% of related spending. International travellers accounted for 27% and 39%, respectively
- On average, domestic travel parties in the Vancouver Island region stayed 3.3 nights and spent \$132 per night during their trip. US travel parties stayed 3.5 nights and spent \$282 per night during their trip, and Other international travel parties stayed 8.7 nights and spent \$110 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 British Columbia.
- 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 9).

**Figure 9: Top Activities on a Trip to Vancouver Island Region**

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

Source: Vancouver Island Regional Profile, April 2013, Destination BC

<sup>22</sup> Destination BC - Statistics Canada Travel Survey of Residents of Canada



\*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 and US residents, and Other international travellers. Over one-quarter of US and Other international travellers visited during the spring months from April to June, particularly Other international residents (31%). British Columbia residents were more likely to travel to the region during the winter months than other markets of origin (Figure 10).

**Figure 10: Vancouver Island Visitation by Season**

Season of travel	BC residents	Other Canadians	US residents	Other international
January to March	18%	22%	10%	8%
April to June	21%	19%	26%	31%
July to September	39%	47%	46%	49%
October to December	23%	13%	18%	12%

Source: Vancouver Island Regional Profile, April 2013, Destination BC

More details can be found at: [www.destinationbc.ca/getattachment/Research/Research-by-Region/Vancouver-Island/RegionalProfiles\\_Vancouver-Island.pdf.aspx](http://www.destinationbc.ca/getattachment/Research/Research-by-Region/Vancouver-Island/RegionalProfiles_Vancouver-Island.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. A full report on the findings is available at [www.destinationbc.ca/Research/Research-by-Region/Vancouver-Island.aspx](http://www.destinationbc.ca/Research/Research-by-Region/Vancouver-Island.aspx).

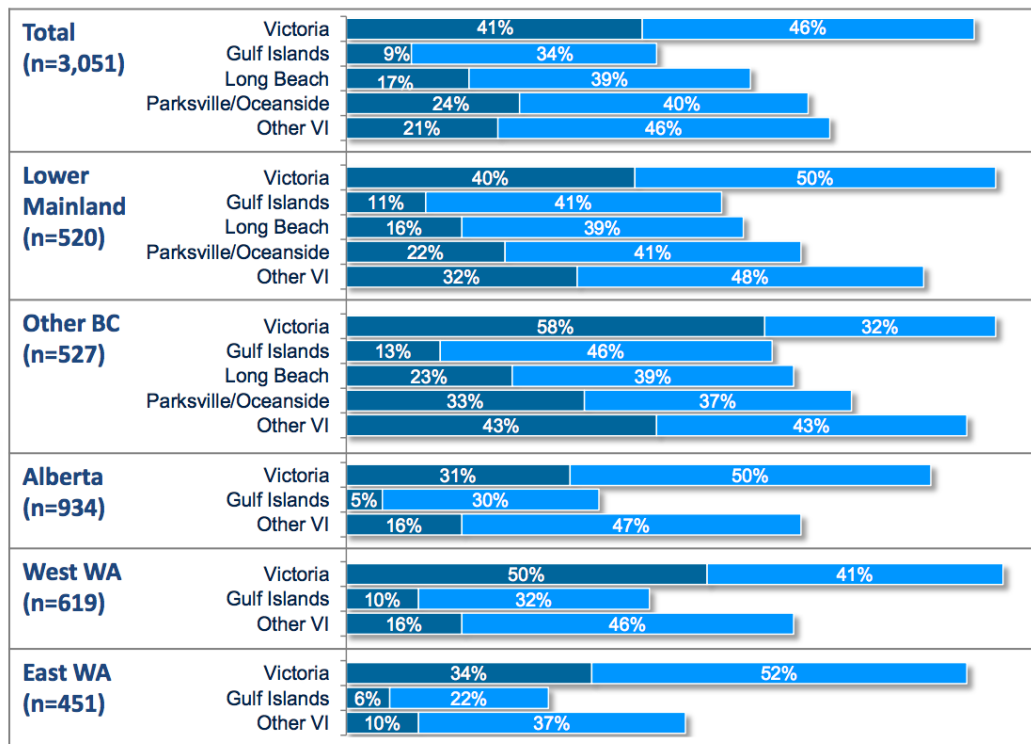
- Visitors to any BC region are looking for destinations that offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.
- Most respondents have some level of familiarity with Vancouver Island destinations, particularly Victoria.
- Key activities which motivated 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 VI destinations compared to Albertan and Washington State residents.

In terms of familiarity with the Gulf Islands, there is evidence of a need for awareness building amongst these key markets (Figure 11).

**Figure 11: 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

### 5.3.3 Southern Gulf Island Visitors

#### **Southern Gulf Islands Community Tourism Study**

The [\*Southern Gulf Islands Community Tourism Study\*](#) (Salt Spring, North Pender, South Pender, Galiano, Saturna and Mayne Islands) was a joint effort by the Salt Spring Island Electoral Area and the Southern Gulf Islands Electoral Area of the Capital Regional District (CRD). Its intention was to help residents, local governments and other stakeholders better understand the area's tourism industry and how it both benefits and impacts the Southern Gulf Islands economically, environmentally and socially.

This study reported that in 2007 the Southern Gulf Islands received almost 670,000 visitors, with Salt Spring accounting for about 385,000 of these visits and the other Southern Gulf Islands accounting for about 285,000. (Note: visitors include recreational property owners who are temporary residents (i.e., “weekenders”) and seasonal residents).<sup>23</sup>

The roughly 450,000 overnight guests to the Southern Gulf Islands spend an average of \$80-\$100 per day on accommodations, transportation, entertainment, food, and shopping in the Gulf Islands. This estimates tourism expenditures to average \$35-45 million per year. The largest portion of tourism expenditures can be attributed to commercial accommodations, with an estimated \$10 million per year spent on hotels, lodges, resorts and B&Bs. The majority of expenditures occur between the months of May and September, which account for 66% of annual visitor numbers.<sup>24</sup>

#### **An Initial Tourism Planning Strategy for the Islands Trust Area**

A June 2006 report entitled *An Initial Tourism Planning Strategy for the Islands Trust Area* by Micheal e. Kelly reported that “several intercept studies had been carried out during (years) that provide information about the tourists who come to the Southern Gulf Islands. The study investigates tourism for all of Vancouver Island and includes the Gulf Islands as one of seven sampling regions. It was a four-season study carried out from the fall of 2002 through the summer of 2003 for Tourism Vancouver Island.

General observations from the summer 2003 survey (total sample size = 3,320; Gulf Islands sample size = 450) show that for many visitors (58.8%) Vancouver Island was the main destination for their trip. Half the travellers surveyed (50.5%) arrived by ferry in passenger vehicles and another 6.3% were walk-on ferry passengers. Sixteen percent of trips originated on Vancouver Island. More than 90% of visitors travelled to pursue leisure activities.

In all seven sampling regions, the highest percentage of visitors stayed between two and five nights. For the Gulf Islands this amounted to 6.8% of the sample. Lesser percentages spent one night or more than

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<sup>23</sup> The sources used for determining these figures came from BC Ferries, Harbour Air, Salt Spring Air and Sea Air statistics.

<sup>24</sup> Southern Gulf Islands Community Tourism Study Part 1: Tourism Profile  
[http://doczine.com/bigdata/2/1367135058\\_591b269ef5/part\\_one-tourism\\_profile.pdf](http://doczine.com/bigdata/2/1367135058_591b269ef5/part_one-tourism_profile.pdf)

six nights. Most visitors stayed in hotels/motels (31.7%), campgrounds (29.1%), or with friends or family (28.1%). Only 9.3% of visitors stayed in a B&B. For the Gulf Islands where there are many B&Bs and vacation rentals available and few hotels/motels, these figures are probably not an accurate reflection of accommodation choice.

According to the study Vancouver Island visitors participated in a variety of attraction activities during their travels. Beaches, parks, local shops and artisans, historic sites, art galleries, and farms and country markets were activities that interested automobile touring travellers and are among the attractions that are available in the trust area. Outdoor adventure tourists participated in hiking, wildlife viewing, canoeing and kayaking, and cycling, opportunities that are also available in the trust area.”<sup>25</sup>

### **5.3.4 Visitor Analysis - Outdoor Activities**

Destination BC has conducted research on key tourism products. Outdoor activities, potentially a key product offering in the Southern Gulf Islands, is one of them.

In 2005, over 1.2 million people participated in British Columbia commercial outdoor adventure tourism, an increase of 24% from 966,000 in 2001. US visitors and British Columbia residents are the heaviest participants of outdoor adventure tourism in British Columbia. The majority of British Columbia 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.

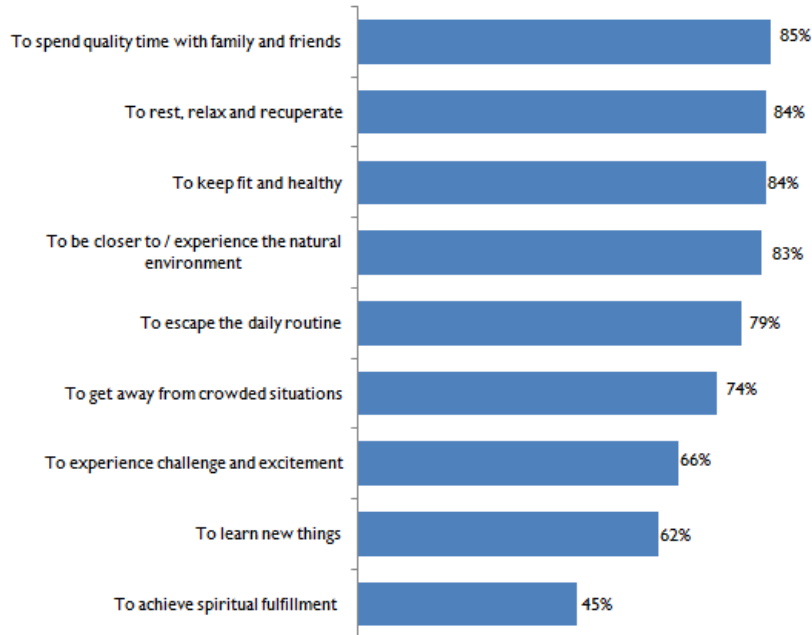
The most common outdoor recreational activities of British Columbia residents include day hiking (55%), beach activities (51%), and swimming at a lake or river (49%). Participation rates vary by region and tend to depend on recreational assets available (e.g. higher participation in ocean activities among those living on the coast).

British Columbia 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.

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<sup>25</sup> An Initial Tourism Planning Strategy for the Islands Trust Area by Michael e. Kelly <http://ebookbrowse.net/initialtourism-pdf-d1946161>

**Figure 12: Top Motivations for Participating in Outdoor Recreation for BC residents**



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

Key market segments for British Columbia'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 British Columbia. Thanks to geographic diversity, the Southern Gulf Islands offers the possibility for a multitude of outdoor adventure activities.<sup>26</sup>

#### 5.4 Product and Service Update

The Southern Gulf Islands are located on the west side of the Strait of Georgia and are accessible in three ways: 1) by vehicle via BC Ferries; 2) moorage for private boats is available at several public wharves or protected bays; 3) floatplane service is offered from Downtown Vancouver, the Vancouver International Airport and from Seattle.

Key product and experiences available on the islands, include<sup>27</sup>:

Product / Experiences	Examples
Accommodations	Resorts, Inns, Hotels, Motels, B&B, cabins, hostels, camping

<sup>26</sup> Destination BC – Parks Canada and BC Parks

<sup>27</sup> Note: product information was compiled from the Experience the Gulf Islands proposal, websites as well as from stakeholder discussions, surveys and interviews.

Transportation	BC Ferries, sea planes, inter-island shuttles, water taxi, on-island buses, car stops, gas stations
Food and Beverage	Restaurants, pubs, cafes, kiosks, grocery stores, bakeries, fish sales (from wharf)
Marine Activities	Kayaking, fishing, boating, sailing, marinas/wharfs, beaches, sheltered harbours, SCUBA diving
Parks and Trails	Gulf Islands National Park Reserve, BC Provincial Parks, walking, hiking, cycling, horseback riding, guiding,
Other Outdoor Activities	Golf courses, disc golf, gardens, children's play areas, baseball fields
Artisans and Studios	Pottery, ceramics, jewelry, fabric arts, painting, photography, murals, soapworks, glassworks
Agritourism	Farmers markets, farm gates, wineries
Wildlife Viewing	Orcas, seals, eagles, migratory birds, deer, otters, sea ducks
Guided Tours	Fishing, wildlife viewing, scenic, whale watching, natural history interpretation
Health and Wellness	Massage, spa, yoga, meditation
Festival and Events	Music festivals, theatre, dance, weddings, bird counts, Mushroom Festival, Literary festival, Wine Festival, Arts Festivals, Lamb Barbeque, Fall Fair
Museums and Heritage Sites	Museums, heritage sites and buildings, lighthouses, archeological sites
Education	Environmental restoration, ocean ecology and whale study, ecosystems and ecology, Saturna Island Marine Research & Education Centre, Gulf Islands film and television school, cooking workshops, park interpretative tours
Retail Stores	Groceries, books, art, antique, clothing
Services	Welcome centres, medical/health clinics, post office, library, liquor and grocery stores, realtors, internet/wifi, customs, recreation centres, community centres, public washrooms,
The People	Locals, residents, weekenders, other visitors

General discussion on the local trends and product experiences for the Southern Gulf Islands revealed the following:

- Increasing ferry costs and service reductions.
- Fewer visitors, in particular US visitors.
- High season is shorter in duration than in the past.
- Escalating costs and increasing regulations for businesses (taxes to insurance; restrictions on any new commercial zoning, fuel and transportation, etc.).
- Shrinking population, aging population, absent vacation homeowners: all combine to make year-round businesses' survival rate perilous.
- Hiking group trips come from Vancouver/Victoria.
- Growth in sea kayaking excursions.
- Increase in destination weddings and girlfriend getaways.

- Nature-based arts and cultural festival planned for the Southern Gulf Islands in April 2015. The draw is bird watching as this area is a migrational bird route – 122 species.
- Increase of cyclists on the island and day-tripper.
- Requests for pet-friendly accommodations are on the rise.
- Visitors need wi-fi.
- Some events are at capacity.
- Visitors are booking shorter trips and require instant feedback when enquiring about availability.
- Boating infrastructure is required – more dock space, showers, laundry facilities, etc.
- Potential opportunity - ETGI trail system designated as part of the Trans Canada Trail Network.

#### **5.4.1 Visitor Servicing**

There are 5 visitor centres/information kiosks located on the Southern Gulf Islands. Galiano Island operates an information booth, located near the BC Ferries terminal on Sturdies Bay Road. Mayne Island has two visitor facilities: the main visitor centre near the Village Bay BC Ferry terminal and a tourism brochure stand in Miners Bay. Pender Island has un-staffed information kiosk and Saturna Island's Welcome Centre is located at the Saturna Point Building.

### **5.5 Tourism Partnerships and Stakeholders**

Each of the Southern Gulf Islands has an organization focusing on tourism. A Chamber of Commerce exists on Galiano Island, Mayne Island and Pender Island while Saturna Island has a Tourism Association.

Each of these long-standing organizations has mandates to support and develop business and their memberships are primarily made up of tourism businesses. Each organization faces the same challenges being volunteer-run and dependent on membership fees and business operator support. They each work with other partners to complete their tourism projects, including: Driftwood Publishing, Island Tides Newspaper, local Parks and Recreation Commission, BC Parks and Parks Canada, local societies such as museums, markets, and trails, Capital Regional District, Economic Development Commission, Islands Trust, Regional Arts Council, BC Ferries, Lions Club, Experience the Gulf Islands project, Tourism Vancouver Island, and Destination BC.

#### **First Nations**

The Southern Gulf Islands is the traditional territory of multiple First Nations, including Penelakut on Galiano Island, Tsawout and Tseycum on Saturna Island and the Penders, and the Tsartlip on Mayne Island.

#### **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. These include:

- Marketing British Columbia domestically, nationally and internationally as a tourist destination;
- Promoting the development and growth of the tourism industry in British Columbia to increase revenue and employment in, and the economic benefits generated by, the industry, including, without limitation, by:
  - Providing support for regional, sectoral and community tourism marketing;
  - Providing industry leadership in tourism marketing;
  - Promoting training and development related to tourism marketing;
  - Providing support for Visitor Centres; and
  - Conducting tourism-related market research;
  - Enhancing public awareness of tourism and its economic value to British Columbia; and
  - Providing advice and recommendations on tourism-related matters.

### **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 not for 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 six regional destination marketing organizations (DMO) 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 the Tourism Partner Program for their respective region. Through the Tourism Partner Program, 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.

## **5.6 Community Attitudes about Tourism**

The Southern Gulf Islands have approximately only half of their dwellings inhabited full-time. Obtaining a true understanding of homeowners' opinions is difficult. However, existing community support for tourism appears to be increasing. Some chambers are seeing an increase in membership and partner involvement in initiatives. Short-term vacation rentals are an on-going issue with resident surveys in process with the Islands Trust. These results should provide more insight into resident opinions regarding visitor accommodation on the islands.



It is also recognized that some of the retired population wants it to stay the way it is, although there are future service issues that will need to be addressed for an aging population. There are some members of the community who are afraid of having their privacy disturbed by tourists, but there is also a sense of urgency that residents need to take action to improve the local economy.

## 5.7 Marketing Efforts

Currently, each of the Southern Gulf Islands conducts their own marketing efforts independently through their Chamber of Commerce of Tourism Association. Generally, marketing efforts are focused on websites, print publications/visitor guides, social media and some promotional advertising.

Each island has a website (see list below). There is no Southern Gulf Islands website maintained by these four islands as a cooperative marketing initiative. However, there are websites at [www.gulfislands.ca](http://www.gulfislands.ca), [www.gulfislands.com](http://www.gulfislands.com) [www.gulfislandstourism.com](http://www.gulfislandstourism.com) and it appears that [www.southerngulfislands.ca](http://www.southerngulfislands.ca) and [www.southerngulfislands.com](http://www.southerngulfislands.com) URLs have been reserved.

[www.galianoisland.com](http://www.galianoisland.com)

[www.mayneislandchamber.ca](http://www.mayneislandchamber.ca)

[www.penderislandchamber.com](http://www.penderislandchamber.com)

[www.saturnatourism.com](http://www.saturnatourism.com)

Website and social media efforts results for each island include:

Island	Website Unique Visitors (2013)	Facebook	Twitter
Galiano Island	72,705	279 likes	n/a
Mayne Island	52,993	n/a	26 followers
Pender Island	48,000	n/a	29 followers
Saturna Island	18,350	192 likes	29 followers

Print publications / visitor guides and print ads have also been produced for each island, and are distributed via Visitor Centres/Welcome Centres (on and off islands), local businesses, BC Ferries, and through a brochure distribution service. Other local organizations such as parks and recreation commissions have also produced visitor maps.

Island	Brochure Printed
Galiano Island	25,000
Mayne Island	25,000
Pender Island	30,000-40,000
Saturna Island	25,000

For each island, there are many organizations that participate in tourism promotion, e.g., arts groups, events. For a full list, see Appendix 2.

Currently Mayne, Pender and Galiano Islands are participating in the Destination BC Community Tourism Opportunities program to each respectively match \$8,600 in marketing activities that include brochure production and distribution, advertising such as a secret season video creation and website development.

At the provincial level, efforts have been taken to promote the Southern Gulf Islands through marketing to potential visitors. HelloBC.com, BC's official tourism consumer website, received 7.4 million visits in 2012.

Each of the four Southern Gulf Islands have 10 pages of dedicated consumer travel information on HelloBC.com, highlighting destination and activity information and providing a link to the tourism organization.

- There were 19,805 organically-searched\* page-views of Galiano Island's content on HelloBC.com during fiscal 2012/13, an increase of 22% over the previous year. There are no Galiano Island business listings on the HelloBC.com website. [www.hellobc.com/galiano-island.aspx](http://www.hellobc.com/galiano-island.aspx)
- There were 12,112 organically-searched\* page-views of Mayne Island's content on HelloBC.com during fiscal 2012/13, an increase of 130% over the previous year. There is one accommodation business listing on the HelloBC.com website for Mayne Island. [www.hellobc.com/mayne-island.aspx](http://www.hellobc.com/mayne-island.aspx)
- There were 4,419 organically-searched\* page-views of Saturna Island's content on HelloBC.com during fiscal 2012/13, a decrease of 16% over the previous year. There are two business listings on the HelloBC.com website for Saturna Island. [www.hellobc.com/saturna-island.aspx](http://www.hellobc.com/saturna-island.aspx)
- There were 3,068 organically-searched\* page-views of Pender Island's content on HelloBC.com during fiscal 2012/13, an increase of 9% over the previous year. There are four business listings on the HelloBC.com website for Pender Island (Inn, B&B, campground and winery) [www.hellobc.com/pender-islands.aspx](http://www.hellobc.com/pender-islands.aspx)

\* Organic search results are listings on search engine results pages that appear because of their relevance to the search terms, as opposed to being directed there from an advertisement. In contrast, non-organic search results (i.e. paid search) may include pay per click advertising.

During the same period the Vancouver Island regional-level pages on HelloBC.com received 400,193 views, an increase of 2% over the previous year. For the sake of comparison, Salt Spring Island had 26,101 organically-searched page-views of their content on HelloBC.com during fiscal 2012/13, an increase of 54% over the previous year. Parksville had 41,739 organically-searched page-views, an increase of 6% over the previous year.

Tourism Vancouver Island also has web pages promoting the destinations within this region: [www.vancouverisland.travel/regions/gulf-islands](http://www.vancouverisland.travel/regions/gulf-islands) - for 2013, this website had 18,100 page views with an average time of 2:12 spent viewing content. The bounce rate was 50%. [www.vancouverisland.travel/accommodations/gulf-islands-accommodations](http://www.vancouverisland.travel/accommodations/gulf-islands-accommodations) - for 2013, this website had 5,230 page views with an average time of 1:52 spent viewing content. The bounce rate was 51%.

Additional activities in 2012/13 from Destination BC and Tourism Vancouver Island that support the marketing of the Southern Gulf Islands include:

- On behalf of all communities in the Vancouver Island region and with support from Destination BC, Tourism Vancouver Island representatives attended the following trade events: CTC Rendezvous Canada, Canada's West Marketplace, National Tour Association (NTA), Canadian Inbound Tourism - Asia/Pacific (CITAP), and the Clipper Vacations Travel Show. Tourism Vancouver Island also conducted sales calls and training to Canadian Inbound Receptive Operators, these included Brewster Travel Canada and Anderson Vacations. Tourism Vancouver Island hosted a total of 15 familiarization trips for a total of approximately 106 trade participants over the past year.
- On behalf of all communities throughout the Vancouver Island region, and with the support of Destination BC, Tourism Vancouver Island representatives attended the following travel media events: Canada Media Marketplace, Go Media Canada, regional media events in Seattle, Vancouver and Calgary, Travel Media Association of Canada Chapter meeting events, and the annual conference of the Society of American Travel Writers (SATW). Tourism Vancouver Island supported 66 press visits for a total of 124 media to the region from a wide range of outlets. The average 2013 Fiscal advertising equivalency of the free media coverage generated is estimated in excess of \$6.9 million.
- In the spring 2013 issue of British Columbia Magazine, Galiano Island was profiled with 1 editorial page providing advertising equivalency estimated at over \$10,835.

## 5.8 Strengths, Weaknesses, Opportunities and Threats

The following SWOT outlines the strengths, weaknesses, opportunities and threats for the Southern Gulf Islands as a destination, followed by unique attributes for each island.

### Strengths

- Quiet, rural, isolated location, secluded, yet close to urban centres of Vancouver and Victoria.
- Nature – beaches, waterfront access, shorelines, Gulf Islands National Park Reserve.
- Whale-watching and marine life.
- Mild weather year-round with very predictable and desirable dry, hot summer weather.
- Outdoor Activities – hiking, sea kayaking, sailing/boating, fishing, geocaching, etc.
- Arts and Cultural activities – artisans, events, festivals, etc.
- Amenities –fire/rescue services, medical clinic, police, etc.

- Car Stops exist on each island.
- Visitor amenities – accommodations (inns, lodges, B&Bs, campgrounds, etc.), restaurants, shops, artists, mooring (docks and buoys), etc.
- Transportation services – seaplane, ferry, marina, docks.
- Safe, friendly and accommodating communities.
- First Nation heritage.
- Destination marketing is occurring in addition to individual business marketing efforts.
- Individual business marketing promotes the islands.
- Visitor information signage, kiosks and/or centres exist on each island.
- Thoroughly developed Official Community Plans produced by the Islands Trust in consultation with the island population and local businesses; preserve and protect mandate ensures long term environmental protection and maintains a desirable place to visit and live.
- Dedicated volunteers on each island working on tourism initiatives.

<b>Galiano Island</b>	<b>Mayne Island</b>	<b>Pender Island</b>	<b>Saturna Island</b>
<ul style="list-style-type: none"> <li>• Proximity to Vancouver – first island, direct ferry.</li> <li>• First-class accommodations at Galiano Oceanfront Inn and Spa.</li> <li>• Warmest swimming waters—Georgia Strait side of Gulf Islands.</li> <li>• Scuba diving – western side bordering Trincomali Channel and Porlier Pass.</li> <li>• Seven parks - Bluff Park; Montague Harbour Provincial Marine Park; Bodega Ridge; Matthews Point Regional Park; Dionisio Point Provincial Park &amp; Bellhouse Park.</li> <li>• Montague Harbour.</li> <li>• First Nation Middens at Montague.</li> <li>• Romantic.</li> <li>• Lover’s Leap Lookout.</li> </ul>	<ul style="list-style-type: none"> <li>• Access to the Belle Chain islands for sea kayaking.</li> <li>• Well-serviced island: school, RCMP, medical centre, fire/ ambulance service.</li> <li>• Centrally-located; direct ferry to/from Swartz Bay.</li> <li>• Strong history of being a popular tourist destination.</li> <li>• Accessible for touring island with a “circular” route.</li> <li>• Geographic hub of the SGI, including ferry transfers.</li> <li>• Japanese Garden.</li> <li>• Georgina Point Lighthouse and day use area.</li> <li>• MICCC - represents 65 local businesses representing approx. 80% of the private businesses on Mayne Island –70% are</li> </ul>	<ul style="list-style-type: none"> <li>• First-class accommodations (Poet’s Cove) and many B&amp;Bs.</li> <li>• Golf course and Disc Golf Park (SSI has the only other golf course in Southern Gulf Islands).</li> <li>• Sea Star Winery.</li> <li>• Otter Bay Marina.</li> <li>• Information kiosk.</li> <li>• Volunteer Marine Host Program at Beaumont, partnership with local yacht club and GINPR.</li> <li>• Pender (Beaumont/Poet’s Cove) often first stop for US boats (Customs office).</li> <li>• More public beach access than other Southern Gulf Islands.</li> <li>• Pender Island Chamber Chamber been involved in tourism for 10 years.</li> </ul>	<ul style="list-style-type: none"> <li>• Nearly 50% of Saturna Island is in Gulf Islands National Park Reserve. (Identified as strength and weakness.)</li> <li>• Land-based whale watching at East Point (Whale Trail) / Fog Alarm Building.</li> <li>• Wild Thyme Coffee House (the bus).</li> <li>• Winery.</li> <li>• Camping at Tumbo Island and Narvaez Bay (GINPR).</li> <li>• Trails/facilities/view at Winter Cove and Mount Warburton Pike (GINPR).</li> <li>• 253 species of mushrooms (Oct-Nov).</li> <li>• Pub (rated best pub by Pacific Yachting).</li> <li>• Good anchorages: Winter Cove, Boot Cove and Lyall Harbour; marina.</li> </ul>

<ul style="list-style-type: none"> <li>• Important Bird Area – Active Pass.</li> <li>• Medical clinic – helipad. Resident doctor and nurse. Important for cyclists and aging population.</li> <li>• Gulf Islands Film &amp; Television School (GIFTS).</li> <li>• 5 government docks (3 CRD, 2 Harbour authority).</li> <li>• Marina – sheltered harbor; historical.</li> <li>• Bus – from Montague to Pub.</li> </ul> <p><u>Events:</u></p> <ul style="list-style-type: none"> <li>• Galiano Literary Festival.</li> <li>• Lion's Fiesta.</li> <li>• Conservancy Learning Centre.</li> <li>• Galiano Concert Society.</li> </ul>	<p>wholly or partially dependent on tourism.</p> <ul style="list-style-type: none"> <li>• Important Bird Area – Active Pass</li> <li>• \$29,000 Chamber budget.</li> </ul> <p><u>Events:</u></p> <ul style="list-style-type: none"> <li>• May Day Festival.</li> <li>• Saturday Farmers Market.</li> </ul>	<ul style="list-style-type: none"> <li>• \$30,000 budget obtained from memberships and CTO cooperative funding.</li> </ul> <p><u>Events:</u></p> <ul style="list-style-type: none"> <li>• Fall Fair.</li> <li>• Art on the Fence.</li> <li>• Lantern Festival.</li> </ul>	<ul style="list-style-type: none"> <li>• 12 passenger bus; free service operating in summer 2014.</li> <li>• 12 passenger whale watching and tour boat; available as an inter-island water taxi service.</li> <li>• Welcome Centre.</li> <li>• Saturna Island Tourism Association formed 15 years.</li> </ul> <p><u>Events:</u></p> <ul style="list-style-type: none"> <li>• Lamb BBQ.</li> <li>• Pig Roast.</li> <li>• Cinco de Mayo.</li> <li>• Open Mic at Lodge.</li> <li>• Saturna Island Marine Research &amp; Education Society (SIMRES) educational presentations.</li> <li>• Annual Parks Day Event at East Point.</li> </ul> <p><u>Venues:</u></p> <ul style="list-style-type: none"> <li>• Heritage Community Hall (100 capacity).</li> <li>• Recreation &amp; Cultural Centre (300 capacity).</li> </ul>
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### Weaknesses/Challenges

- The Southern Gulf Islands depend on BC ferries for tourism traffic, but with increasing fares the islands have been seeing considerably fewer visitors.
- Each Southern Gulf Island has experienced a decrease in US visitors since 9-11 and the tightening of border security and the economic downturn in the US.
- Southern Gulf Islands experience high degree of seasonality. Services are stretched in the summer but underutilized the remainder of the year.
- More expensive destination than interior of BC.
- Many tourism businesses are only part-time as owners need to have additional employment.
- Seasonality results in limited business hours in off-season.
- No existing tourism development or marketing plan implementation.

- No tourism or event coordinator.
- Lack of brand for the Southern Gulf Island as a whole to encompass and enhance the overall destination and complement individual island brands.
- It is believed by some the BC Ferries naturalist program discusses the Pacific Rim, not the Gulf Islands that they are travelling right past, although Gulf Islands is included in the program.
- There is a lack of understanding among some tourism business owners as to how to be involved in social media marketing (Facebook, Twitter, TripAdvisor, etc.).
- Meeting participants were not aware of the ways that Destination BC and Tourism Vancouver Island are currently marketing the Southern Gulf Islands (HelloBC.com and VancouverIsland.travel).
- Lack of support amongst businesses on islands; lack of cross-selling on-island or amongst islands.
- Limited, or increasingly dated, tourist attractions. Lack of economic growth discourages tourism investment, especially with those enterprises having limited access to capital.
- Lack of coordinated collaboration. Islands Trust has a specific mandate and islands have Chambers, and economic development commission is trying to assist islands to work together, e.g. Experience the Gulf Islands Regional Trail System. Groups are working independently rather than together as the Southern Gulf Islands.
- Islands work independently. Islands Trust is involved and CRD has a role – manages water, garbage. Islands don't have mayor and council. One CRD rep has too big of a mandate.
- Islands Trust limiting economic development.
- No overall tourism or event coordinator.
- Lack of baseline data (number of visitors, numbers of boats, etc.).
- Aging population and lack of young people to provide services.
- Worker accommodations can be hard to find.
- Businesses closing due to lack of customers.
- Islands are looking their age; lack of general upkeep and investment capital.
- Lack of cooperative marketing and hours of operation between businesses.
- Lack of cellular and broadband internet coverage in key areas.
- Part-time residents. Family cottages sitting empty.
- Lack of campgrounds; particularly accessible campsites for sea kayakers.
- Limited RV camping (some see this as a strength).
- Lack of mooring buoys, laundry and shower facilities for boaters at Montague Harbour Marina.
- Lack of boat rentals and fishing charters.
- Lack of activities for younger visitors.
- Lack of on-island transportation – bus service, taxi, bike and walking paths/trails, etc. Creates a dependence on personal vehicles for exploring the island.
- Lack of easily accessible and inexpensive inter-island transportation, such as water taxi.
- Increased taxation on businesses (local taxes and PST/HST issue); possible reduction in funding from local government.

<b>Galiano Island</b>	<b>Mayne Island</b>	<b>Pender Island</b>	<b>Saturna Island</b>
<ul style="list-style-type: none"> <li>• Lack of budget accommodations (except campground).</li> <li>• Campground is full in summer.</li> <li>• No land access to Dionisio Point Provincial Park.</li> <li>• Lack of emergency medical support.</li> <li>• Not part of the Gulf Islands National Parks Reserve.</li> <li>• No services: have to provide own water treatment, sewage/septic, recycling and garbage.</li> <li>• One long main road on the spine of the island – no loop for people to explore.</li> <li>• Lack of signage.</li> </ul>	<ul style="list-style-type: none"> <li>• Visitor centre is very busy after summer ferry arrivals, causing overcrowding.</li> <li>• Mayne Island does not have the name recognition of other Southern Gulf Islands</li> <li>• Lack of a marina.</li> <li>• Lack of golf course.</li> <li>• Lack of convenient access to the adjacent Southern Gulf Islands (small ferry, water taxi; water tourism services).</li> </ul>	<ul style="list-style-type: none"> <li>• Loss of Sound Passages water taxi business, (Ministry of Transportation required the removal of the sign on road).</li> <li>• Locals don't understand the value of tourism to Pender Island.</li> </ul>	<ul style="list-style-type: none"> <li>• Recreation Centre is privately owned by Saturna community and therefore cannot receive funds from CRD.</li> <li>• Nearly 50% of Saturna Island is National Park Reserve (identified as strength and weakness); Parks Canada has limited financial resources for Parks development.</li> <li>• Public Dock, administered by CRD, is in very good condition but has limited moorage.</li> <li>• No regular scheduled floatplane service.</li> <li>• Poorly marked trails.</li> </ul>

## Opportunities

- Increased marketing efforts for the SGI, including Enhance representation of the Gulf Islands in Vancouver Island region and Destination BC marketing activities.
- A major effort to extend the shoulder seasons through advertising and increased attractions would positively impact the bottom line of many businesses.
- Regulate and legalize short-term vacation rental properties under new by-law. Incorporate unoccupied homes into short-term rentals.
- Urbanization/stress creates need to get away to places like the Gulf Islands.
- Falling Canadian dollar can increase US visitation.
- Implementation of the ETGI proposal - development of an island pathway system, enhanced marina/dock facilities, connection to Trans-Canada Trail system.
- Improvement of local inter-island access especially for foot/bike/kayak passengers.
- Fully utilize established resorts, B&Bs, guesthouses, all with applicable zoning and land-use regulations, even in the high season.

- Streamline governance – to promote safe, measured community growth.
- Develop, promote and encourage job producing enterprise targeted at young families.
- Develop strategic plan for secure transportation methods. Southern Gulf Islands could work with Tourism Industry Association of BC (TIABC) to address BC Ferries issues.
- Address the fact that Western Diversification resources, aimed at rural communities, are not be available to Southern Gulf Islands as they are part of an urban regional district (CRD).
- Pocket cruise ship business development (from Seattle & Vancouver) gaining access to Montague Harbour Marina , Port Browning and Ganges via these ports’ special Federal pocket cruise ship tender designations that have been set up via contracts signed by Marina owners for the period June 2013-2018.

<b>Galiano Island</b>	<b>Mayne Island</b>	<b>Pender Island</b>	<b>Saturna Island</b>
<ul style="list-style-type: none"> <li>•Peace Park being constructed – dedicated to Sri Chinmoy, a spiritual leader.</li> <li>•Asian, primarily Chinese market.</li> <li>•Develop visitor centre separate from Remax Office</li> <li>•Growth of the Galiano Saturday Market and craft products.</li> </ul>	<ul style="list-style-type: none"> <li>•If funding becomes available, Re-Max owners can provide space for a visitor centre.</li> <li>•Marina or dock development.</li> </ul>	<ul style="list-style-type: none"> <li>•A petition recently signed by 600 people in support of short-term vacation rentals that are regulated under Islands Trust.</li> <li>•Proposed survey/inventory of Pender Island could provide additional information regarding quality of life/ resident needs.</li> <li>•Potential renewal of Tsawout reef net fishing.</li> <li>•Utilize Timbers.</li> <li>•Parks Canada potential with trail networks and camping facilities.</li> <li>•New walk-in/kayak-in campsite at Shingle Bay (projected to open in 2015).</li> </ul>	<ul style="list-style-type: none"> <li>•SIMRES marine science programs,to provide learning opportunities.</li> <li>•Establishing a Saturna Island Chamber of Commerce.</li> <li>•Saturna Island’s location at the centre of the Salish Sea.</li> <li>•Parks Canada potential with trail networks and camping facilities.</li> <li>•Customs clearance available to boaters (as on Tumbo Island).</li> <li>•Kayak rentals being re-established.</li> <li>•Millhouse restaurant – fully licensed (Saturna Lodge).</li> <li>•Hostel or campground to attract younger demographic.</li> </ul>

### Threats

- BC Ferries – fare increases and service reductions.
- Parks Canada budget cuts.



- Islands Trust is perceived by some as hindering development, alternative land use or densification.
- CRD urban management structure for rural communities.
- Negative attitude towards tourism and development within segments of the community.
- Development growth that can damage or adversely affect pristine natural environment.
- Low priority for BC Government on supporting and developing tourism in the coastal communities of British Columbia.
- Small and aging population base means limited human resources and decrease in volunteer base on island.
- Loss of island businesses.
- Weather dependency. Summer visitor numbers are highly dependent on good summer weather (June to September).

## 5.9 Key Components for Success

Meeting respondents were asked what hasn't worked in the past that would be required to make this planning process successful. The common themes included:

- A measurable plan that respects the input from the meeting attendees, reflects the limited resources and funding and outlines roles and responsibilities.
- Identified champions who will lead implementation of Southern Gulf Islands tourism plan.
- Combining the efforts of various groups and initiatives to make the most effective use of limited resources and funding (Experience the Gulf Islands, Regional Arts Council, CRD Economic Development Commission, SaturnaWorks, etc.).
- Support from marketing partners including tourism stakeholders on each island, Tourism Vancouver Island and Destination BC.

Key Components for Success were also identified within the ETGI proposal, and although many were infrastructure specific, highlighted was "solid relationships, careful management, secure funding".

## 6 Strategic Plan

Tourism destination development and marketing involves envisioning, strategically planning, and then marketing a defined area as a desired destination for travellers.

It enhances the quality of tourism services, amenities, businesses and practices through effective planning and capacity-building to ensure a tourism destination is well positioned to make future strategic decisions, address issues and capitalize on opportunities.

### 6.1 Vision

Four individual island tourism planning sessions were conducted and input was sought regarding a vision for tourism in the Southern Gulf Islands. Common themes emerged, including: growing the tourism visitation numbers year-round, improved and sustainable local economies that supports residents, improved tourism amenities, developed harbours and marinas, connections on and between islands to better coordinate visitor experiences, developing brand recognition and ensuring ecologically sensitive tourism.

These common themes, along with elements of the islands' OCP documents, have been incorporated into a Vision Statement:

The Southern Gulf Islands are cooperatively branded and are internationally recognized as a year-round marine destination with unique, authentic coastal experiences.

The thriving tourism industry supports small business on each island, encouraging a diverse population to remain in the communities, while providing benefits to both residents and visitors in harmony with the ecological and cultural values of island living.

While the long term vision would be to work more closely with Salt Spring Island, the vision for this plan would be to focus on the four island – Mayne, Galiano, Pender, and Saturna.

This tourism vision supports/is supported by the vision included in the Experience The Gulf Islands proposal:

*We invite you – residents and visitors – to experience firsthand our gulf islands, to explore their ancient history, natural wonders and communities, to slow down, meet our people, get to know the trails and marine waters that lap our shores – to experience the joy of discovery as you journey the Islands in the Salish Sea.*

## 6.2 Objectives

Baseline research will be required to determine the current performance measurement of these objectives and establish targets for the future.

1. Increase visitor volumes, length of stay and spending.
  - Target: 4-6% growth rate
  - Baseline: to be determined
  - As measured by:
    - Increase length of high season.
    - Growth of shoulder season and mid-week.
    - Increase 3-night stays and repeat visitation.
    - BC Ferries traffic increases in shoulder season.
2. Increase tourism economic revenues to the Southern Gulf Islands.
  - Target: 4-6% growth rate.
  - Baseline: to be determined
  - Target: Increase in viable tourism businesses supporting more full-time employees.
  - Baseline: to be determined

## 6.3 Sources of Funding

This plan has been developed based on a budget of \$100,000. As the budget for the Priority Actions outlined within this plan exceeds the total annual budget available from the Southern Gulf Island stakeholders, new revenue streams will need to be sourced.

Currently, funding support may be available from the following sources:

Island Organizations	There may be funds available from existing organizations on each island that support tourism, e.g., Chamber of Commerce (Galiano, Mayne, Pender), SaturnaWorks, Arts organizations, etc.
Southern Gulf Island Cooperative Marketing	Buy-in Fees can be charged to participate in cooperative marketing efforts, e.g., campaigns, ad tiles on website, feature within newsletters, etc.
Destination BC	The Community Tourism Opportunities program offers \$21,000 as matching funds for clusters of communities to work together (such as Southern Gulf Islands).
DMOs	There may be additional funds available from other DMOs to leverage and extend marketing efforts, e.g., Tourism Vancouver Island, Destination BC.
CRD	There may be funds available from the CRD, in particular from Economic Development and Regional Parks & Trails.
Government Grants	There are multiple government grant programs, provincially and federally. Some activities outlined within this plan may fit within funding criteria.
Partnerships	There may be leveraging funds available from partnership activities, e.g., Salt Spring Island, Harbour Air.

Fundraising Events and Activities	Events or other activities could be developed to assist with raising funds.
In kind support	Donation of time, funds or resources may be provided.

It is important to review this plan on an annual basis to reprioritize activities, determine funding requirements and determine availability of funds.

## 6.4 Strategic Priorities

At each island tourism planning session, participants ranked the tourism strategies in terms of priority. The common themes were:

- Developing a strategic plan for tourism in the Southern Gulf Islands, including Salt Spring Island.
- Developing branding.
- Increasing marketing efforts.
- Engaging in cooperative group marketing as the Southern Gulf Islands.
- Creating and promoting packages, itineraries and new events.
- Ensuring coordination between islands and supporting existing tourism-related initiatives such as the Experience the Gulf Islands (ETGI) project.
- Working on product enhancement: marina facilities (boat repair, laundry, showers, etc.); on-island and inter-island transportation; hiking trails expansion (ETGI).
- Working toward a paid tourism coordinator to manage some aspects of the plan implementation e.g. social media monitoring, etc.
- Conducting community and partner education on tourism activities and their value.

See Appendix 3 for a summary of each island's priorities.

## 6.5 Strategies

The following identified strategies will support the goals/objectives of increasing visitation and average spend.

1. Increase awareness of the Southern Gulf Islands as a tourism destination.
2. Utilize a Southern Gulf Islands brand to leverage iconic products and generate greater appeal of a larger destination area.
3. Position the Southern Gulf Islands as a premier destination for authentic coastal marine activities and experiences.
4. Work in partnership to extend marketing reach and effectiveness.
5. Increase the quality of the visitor experience.
6. Increase the ease of travelling to and around the Southern Gulf Islands.
7. Increase the coordination and cooperation amongst the tourism industry and stakeholders.
8. Secure a stable funding source to consistently enable ongoing tourism development and marketing activities.

## 6.6 Target Market

The primary target markets for the Southern Gulf Islands are as follows. The intention is to not just market by segment, geographic market or sector (primary trip motivator) but to mix-and-match the targets by marketing activity to maximize marketing effectiveness and ensure support for all tourism businesses (directly or indirectly).

### Segment

- Primary: Leisure. (90% of focus)
- Secondary: VFR and business (meetings and retreats). (10% of focus)

### Geographic Markets

- Primary: Lower Mainland, southern Vancouver Island and western Washington State.
- Secondary: rest of BC.

### Sectors

The following target markets by sectors are provided as they are primary motivators of travel, not just activities offered by the Southern Gulf Islands.

- Mariners (two markets - power & sail boat cruisers and water sports group that includes canoes, kayaks, rowboats and paddle boards).
- Wildlife viewing – whale watching, bird watching.
- Naturalists.
- Hikers.
- Cyclists.
- Culinary/food/wine – Blackberry festival, lamb BBQ, etc .
- Family vacations.
- Weddings, small corporate retreats.
- Romantic getaways, family reunions, girlfriend getaways.
- Rejuvenation, yoga, quiet retreats.
- Arts & Culture enthusiasts.
- LGBT.
- Geo-tourists.

### Seasonality

- Shoulder/off season: BC residents getaways and retreats, weddings, events, arts & culture.
- Peak season (midweek for some islands): BC residents, families, outdoor activities.

## 6.7 Brand and Marketing

The creation of a Southern Gulf Islands brand and stronger individual island brands were identified as priorities for the stakeholders in the planning sessions. The creation of a Southern Gulf Islands brand<sup>28</sup> would enable cooperative marketing activities and generate greater appeal of a larger destination area, while still ensuring strong, unique identities for each island.

Galiano, Mayne, Pender and Saturna islands all have organizations and volunteers promoting their part of the Southern Gulf Islands to key target markets. A collaborative approach to marketing could result in more effective and efficient marketing campaigns, based on the simple idea that by working together, the islands can be stronger. For example, individual efforts in publication production and the costs of printing and distribution are duplicated.

The Southern Gulf Island communities can pool resources and ideas to create strong, targeted marketing messages that not only benefit the tourism businesses of their communities, but also the visitor who is able to experience something they may not have known about. This is not a new concept in the tourism industry and there are examples in British Columbia of other areas marketing together:

- The *You Are Here* campaign markets Penticton, Okanagan Falls, Naramata and Summerland together [tourismpenticton.com/youarehere](http://tourismpenticton.com/youarehere)
- Vancouver Island North promotes the communities of Port Hardy, Port McNeill and Alert Bay [www.vancouverislandnorth.ca](http://www.vancouverislandnorth.ca)
- The Stay Fraser Valley campaign markets the communities of Langley, Abbotsford and Chilliwack together [stayfraservalley.ca](http://stayfraservalley.ca). Each community maintains their unique character (Langley – food and wine; Abbotsford – farm fresh city in the country; Chilliwack – outdoor adventure) while providing the visitor with a richer list of experiences to choose from. The Fraser Valley visitors guide outlines the experiences available in key areas (Arts & Culture, Farm Fresh Food, Shopping, Outdoor Adventure, etc.) and highlights where in the valley the visitor can find them: [http://stayfraservalley.ca/2014\\_Experiences\\_Guide\\_web.pdf](http://stayfraservalley.ca/2014_Experiences_Guide_web.pdf)

A full and comprehensive branding strategy has been identified as outside the current financial and time constraints of Galiano, Mayne, Pender and Saturna Islands. This should be an initiative that is explored in subsequent years based on the successful implementation of the strategies referenced in this document. In the short-term, cooperative marketing as the Southern Gulf Islands, rather than four separate destinations, can be the first step in building a Southern Gulf Islands destination.

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<sup>28</sup> It is important to note a Southern Gulf Islands brand is more than just a logo. Per the Super, Natural British Columbia® Brand Book “A tourism brand represents the essence and enduring characteristics of a tourism destination and is based on the area’s core assets such as its landscape, people, culture and history. It is the destination’s story, or value proposition, reflecting the experiences visitors can expect when they visit the area. The brand becomes the way in which these assets are perceived by potential visitors and how they relate to the fulfillment of these expectations. Its role is to strengthen the impact of destination marketing and promotion.” [www.destinationbc.ca/Resources/british-columbia-tourism-brand.aspx](http://www.destinationbc.ca/Resources/british-columbia-tourism-brand.aspx)

### **EQ (Explorer Quotient™) Program**

The Canadian Tourism Commission EQ program could be a valuable tool to assist with the creation of a Southern Gulf Islands brand. Tourism Vancouver Island, in partnership with a number of community destination marketing organizations, has invested in the Canadian Tourism Commission's EQ program. This program provides psychographic detail of travel, including why people travel, what the different types of travellers are and why they are looking for different travel experiences than others.

The EQ program offers free tools and resources available to all stakeholders that will assist in reaching guests on a deeper level and communicating with them more effectively. Tourism Vancouver Island is available as a resource to help stakeholders take advantage of this new marketing tool. Gulf Islands National Park Reserve has adopted this tool in their promotional work and developed EQ-based visitor itineraries – see weblink <http://www.pc.gc.ca/eng/pn-np/bc/gulf/visit/eq.aspx>.

## **6.8 Priority Activity Areas**

The following section outlines the priority activity areas to support the identified goals, objectives and strategic priorities. This document is not meant to be an exhaustive list of all activities, but rather to highlight the strategic priorities for the next one to two years. The execution of the activities is dependent on funding and time.

### **Tourism Management**

1. Tourism Planning and Management
2. Research, Monitoring and Evaluation
3. Communications / Community Relations

### **Branding and Marketing**

4. Develop Southern Gulf Islands marketing platform
5. Product Packaging
6. Promotional Tool and Materials
7. Integrated Promotional Mix
8. Marketing Partnerships and Programs

### **Visitor Services**

9. Community Welcome

### **Destination and Industry Development**

10. Industry and Professional Development
11. Product Development and Enhancement
12. Transportation and Infrastructure

## **TOURISM MANAGEMENT**

<b>1.</b>	<b>Tourism Planning and Management</b>
<b>Objective</b>	Utilize and expand the capacity of tourism stakeholders in implementing the Southern Gulf Islands Tourism Plan.
<b>Description</b>	<p>Ongoing efforts need to be continued to ensure all stakeholders on Galiano, Mayne, Pender and Saturna Islands are working together and are represented and supporting this plan.</p> <p>A balanced approach of funding management is required to ensure sustainable funding for ongoing activities as well as one-time or time-bound funding for specific projects.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Program Management <ul style="list-style-type: none"> <li>○ Determine, document and communicate stakeholder roles in coordinating tourism initiatives (committees tasked with various components of plan).</li> <li>○ Establish clear understanding to work together in a cooperative and collaborative, consumer driven manner, ensuring representative engagement and enabling benefits for all.</li> <li>○ Hire a part-time coordinator to manage the execution of the plan, or portions of, e.g., social media, website development, and media relations. Explore possibility of students and/or exchange of services, e.g., on-island accommodations in exchange for service. <ul style="list-style-type: none"> <li>▪ Explore existing roles that can be expanded.</li> <li>▪ Contract specific actions within the plan.</li> <li>▪ Explore hiring part-time coordinator for oversight of one or more activities. Connect with Tourism Vancouver Island for a list of potential contractors.</li> </ul> </li> <li>○ Coordinate the annual and ongoing tourism planning for the Southern Gulf Islands to ensure tourism planning is integrated and collaborative. Involve Salt Spring Island as appropriate.</li> </ul> </li> <li>• Experience the Gulf Islands (ETGI) <ul style="list-style-type: none"> <li>○ Facilitate discussions to ensure the ETGI project is fully integrated into the tourism plan. Examples include: <ul style="list-style-type: none"> <li>▪ Coordination of ETGI implementation planning.</li> <li>▪ Coordination of funding requests.</li> <li>▪ Creation of one website.</li> <li>▪ Development of one marketing platform/brand strategy.</li> </ul> </li> <li>○ The focus of the ETGI project is on product and infrastructure development within the tourism plan. Coordination meetings should be held between the ETGI Teams and Chambers of Commerce/SaturnaWorks to ensure all stakeholders are involved and that funding requests, research work and development activities are fully integrated.</li> </ul> </li> <li>• Annual Planning <ul style="list-style-type: none"> <li>○ Annual meetings to review the Southern Gulf Islands Tourism Plan execution and budget. Engage members and stakeholders in prioritizing projects for subsequent years and allocating funding.</li> </ul> </li> <li>• Secure Funding</li> </ul>



	<ul style="list-style-type: none"> <li>○ Identify priority projects within this Tourism Plan requiring outside funding.</li> <li>○ Monitor government programs to identify partnerships or opportunities to secure assistance with management or implementation of the tourism plan.</li> <li>○ Explore funding from stakeholder or membership fees or participation, e.g., buy-in for marketing programs.</li> <li>○ Apply to Destination BC <i>Community Tourism Opportunities</i> program for matching funds (up to \$21,000). This requires a marketing plan and matching funds from industry and is managed by Tourism Vancouver Island.</li> <li>○ Look for specific funds and grants that match product experience opportunities within the Southern Gulf Islands (e.g. SaturnaWorks, Experience the Gulf Islands project, etc.).</li> <li>○ Look for in-kind support from community stakeholders.</li> <li>○ Explore the availability of the CRD grant coordinator to assist with grants funding.</li> <li>○ Explore cost savings from coordinating existing marketing efforts, e.g., reducing publications from four to one (see page 67).</li> <li>○ While identified as not a supported option currently, there may be greater support in the future for the potential of implementing of the 2% Municipal &amp; Regional District Tax (MRDT) or a Destination Management Fund for the entire Southern Gulf Islands. This should be reviewed in subsequent planning cycles.</li> </ul> <ul style="list-style-type: none"> <li>● Growth and Sustainability of Tourism <ul style="list-style-type: none"> <li>● Develop an industry driven code of conduct to help ensure that, as tourism grows, tourism operators and visitors do not negatively impact residents or natural and ecological assets. <ul style="list-style-type: none"> <li>○ Review the National Geographic Geotourism Charter global template as a starting point (see <a href="http://travel.nationalgeographic.com/travel/sustainable/pdf/geotourism_charter_template.pdf">http://travel.nationalgeographic.com/travel/sustainable/pdf/geotourism_charter_template.pdf</a>)</li> </ul> </li> <li>● Ensure cooperation and consultation with local service providers (e.g., Fire Rescue, medical clinics, etc.) at every level to ensure resident and visitor conflicts are minimized and safety remains paramount for all.</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>● Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>● \$15,000</li> <li>● Funds from island representative organizations (see Implementation on page 67)</li> <li>● Coordinator Funding options: Chamber of Commerce funds, federal work grants, students.</li> </ul>

<b>2.</b>	<b>Research, Monitoring and Evaluation</b>
<b>Objective</b>	Establish a tracking and evaluation program that is directly associated with the goals and objectives of the tourism plan.
<b>Description</b>	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 the Southern Gulf Islands.

	<p>Instill a culture of ongoing performance measurement collection and documentation to enable the analysis of trends over time and ensure business decisions are based on solid information, research and analysis.</p> <p>Tourism development and marketing activities should be monitored and evaluated so stakeholders and other partners can assess plan progress. This will help with managing and allocating resources, assisting with partnership development and building better relationships with the community by communicating expectations, outcomes and benefits.</p>
<b>Actions</b>	<p>Priority</p> <ul style="list-style-type: none"> <li>• Develop a process or program to ensure tracking and sharing of performance measurement of industry performance and marketing activity performance, including: <ul style="list-style-type: none"> <li>○ Visitor Centre/Welcome Centre Statistics.</li> <li>○ Accommodation occupancy rates and Average Room Rate.</li> <li>○ Marine traffic, e.g., marinas, wharfs.</li> <li>○ Ferry traffic statistics from BC Ferries.</li> <li>○ Participation rates of key product experiences, e.g., Lion's Bus, festival attendance, etc.</li> <li>○ Website analytics.</li> <li>○ Social Media reach and engagement.</li> <li>○ Earned media.</li> <li>○ # of media familiarization tours.</li> </ul> </li> <li>• Implement a visitor survey for the entire SGI area. <ul style="list-style-type: none"> <li>○ Ensure data is captured to understand the motivations and behaviours of visitors to each individual island as well as the larger destination combined.</li> <li>○ Look at Galiano survey as a template for all islands.</li> <li>○ Connect with Destination BC and Tourism Vancouver Island for assistance in survey questionnaire design.</li> <li>○ Explore working with Vancouver Island University to conduct a Visitor Experience Survey Project for the Southern Gulf Islands.</li> </ul> </li> <li>• Work with Tourism Vancouver Island to implement the EQ program, to gather additional data on potential visitors.</li> <li>• Implement robust website and social media statistics tracking to enable better collection of visitor information through these critical channels to market.</li> <li>• Conduct monitoring and tracking of 2014 transportation projects to determine usage and value for tourism economic growth. This may assist with business cases and funding requests to ensure sustainability of services. Include: water taxi/shuttles, community buses, car rentals, bike rentals, parking.</li> </ul> <p>Secondary</p> <ul style="list-style-type: none"> <li>• Create a culture of researching/following other destinations and organizations and target markets to generate ideas for the Southern Gulf Islands (e.g. San Juan Islands, Discovery Islands – Quadra and Cortes).</li> <li>• Monitor Destination BC Research webpage for overall BC industry performance.</li> <li>• Connect with Destination BC Research for assistance in establishing performance</li> </ul>

	<p>measurements specific to the Southern Gulf Islands (see <a href="http://www.destinationbc.ca/research.aspx">www.destinationbc.ca/research.aspx</a>).</p> <ul style="list-style-type: none"> <li>• Complete a current <i>Value of Tourism</i> visitor study to provide insight on consumer trends and establish a baseline to monitor against in future years (see <a href="http://www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Value-of-Tourism-Model.aspx#.UznX761dXIo">www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Value-of-Tourism-Model.aspx#.UznX761dXIo</a>).</li> <li>• Develop a forum / system to ensure sharing of key learnings amongst all tourism stakeholders.</li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$0</li> </ul>

<b>3.</b>	<b>Communications / Community Relations</b>
<b>Objective</b>	Establish a communications and community relations strategy that engages and informs the tourism industry, stakeholders, and residents to contribute to an enhanced tourism marketing climate. Encourages participants and support for tourism development.
<b>Description</b>	A communications program that targets all stakeholders in the community and keeps them informed about the progress of individual initiatives and overall plan progress is recommended.
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Stakeholder Participation <ul style="list-style-type: none"> <li>○ Initiate email updates/newsletters to interested stakeholders (there are many communities in BC with great examples of stakeholder communication tools).</li> <li>○ Hold annual tourism stakeholder meetings and invite interested stakeholders to additional meetings where engagement is valuable.</li> <li>○ Ensure product inventory of tourism operators is maintained.</li> </ul> </li> <li>• CRD, Islands Trust <ul style="list-style-type: none"> <li>○ Provide the CRD and Islands Trust with a copy of this and subsequent Tourism Plans and highlight areas for potential support and engagement.</li> <li>○ Provide updates on activities and accomplishments.</li> </ul> </li> <li>• Community (resident) Engagement <ul style="list-style-type: none"> <li>○ Provide updates to community residents.</li> <li>○ Coordinate with Tourism Vancouver Island sharing value of tourism information through the Powering Economic Alignment and Growth through Tourism program.</li> <li>○ Explore the development of open houses or a “Visitor to your own Island” day/weekend for residents to be provided with free or discounted access to tourism product. Use the opportunity to generate support for tourism as well as encourage residents to promote the Southern Gulf Islands to VFR.</li> <li>○ Consider social media activities that help engage residents as well as travellers (e.g. photo contest).</li> </ul> </li> <li>• Explore the development of a public relations/media campaign to address the perceptions of the costs of travelling to the islands.</li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$0</li> </ul>

## **BRANDING AND MARKETING**

<b>4.</b>	<b>Develop Southern Gulf Islands marketing platform</b>
<b>Objective</b>	Cooperatively marketing the Southern Gulf Islands as one destination to create more compelling reasons to visit Galiano, Mayne, Pender and Saturna Islands.
<b>Description</b>	<p>Develop a cooperative marketing platform that first positions the Southern Gulf Islands as a visitor destination, followed by the individual islands as complementary experience options.</p> <p>The marketing efforts should clearly designate the Southern Gulf Islands while still maintaining a unique identity for each of the four island communities – Galiano, Mayne, Pender, and Saturna.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>Secure a Gulf Islands URL and develop a simple website that will act as the call-to-action for all Southern Gulf Islands marketing efforts. This site will highlight and link to each of the existing four island websites. This site can contain overview information to entice the visitor, have seasonal images/content and list suggested itineraries (see Priority Activity #8). Detailed information, such as accommodation business listings can remain on the relevant island websites. <ul style="list-style-type: none"> <li>This tactic was also identified within the ETGI proposal as an opportunity.</li> </ul> </li> <li>Determine top 4-6 iconic experiences that will be used to showcase the destination. <ul style="list-style-type: none"> <li>Ensure all key product experiences are represented in marketing communications, however, iconic experiences will be the “lead message” whereas other experiences will be the “supporting messages”.</li> </ul> </li> <li>Ensure the marketing platform fully integrates Experience the Gulf Islands.</li> <li>Ensure each individual island website contains all relevant information referenced on the Gulf Islands website (accommodations, restaurants, etc.) and links to the Southern Gulf Island website.</li> <li>Communicate the new cooperative marketing platform to tourism operators and stakeholders to ensure understanding of the new direction and application of use. <ul style="list-style-type: none"> <li>Prepare a one-page backgrounder explaining the consumer-centric approach and the cost savings.</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>\$20,000 year one</li> </ul>

<b>5.</b>	<b>Product Packaging</b>
<b>Objective</b>	Create itineraries to provide more compelling and enticing packaged travel experiences within the Southern Gulf Islands.
<b>Description</b>	<p>Consumers are looking for unique, memorable, authentic experiences and the Southern Gulf Islands has the ability to package and provide the experiences potential guests are looking for.</p> <p>Efforts should be made to create compelling and attractive packages that:</p> <ul style="list-style-type: none"> <li>Encourage visitors to the Southern Gulf Island to stay longer and participate in</li> </ul>

	<p>activities and experiences on each island.</p> <ul style="list-style-type: none"> <li>• Entice same day or event-specific visitors to return for a longer visit within the area.</li> <li>• Provide residents with ideas for Visiting Friends and Relatives (VFR) to enhance and extend their stay.</li> </ul> <p>Travel media are also looking for new and unique offerings for their consumers. Ensure story ideas are shared with TVI as part of the Destination BC provincial travel media efforts.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Packaging and Itinerary Development <ul style="list-style-type: none"> <li>○ Seek assistance from TVI on best way to encourage packaging and itinerary development.</li> <li>○ Create packages and itineraries for both day and overnight stays. Focus goal of packages on increasing visitation, length of stay and yield (\$ spent per person).</li> <li>○ Facilitate packaging and itinerary development workshops and sessions. Provide assistance and guidance to members and stakeholders on developing appealing and compelling packages and promoting them.</li> <li>○ Create itineraries featuring a variety of activities but with each itinerary appealing to a specific market or travel motivation, e.g.: <ul style="list-style-type: none"> <li>▪ By target market.</li> <li>▪ By season, in particular to support the shoulder/off season, e.g., spring, fall, winter.</li> <li>▪ By length of stay, in particular to focus on 3-night stays, e.g., 1 day, 3 days, one week.</li> <li>▪ By travel motivation e.g., outdoor recreation, wildlife viewing, cyclists, arts and culture, events.</li> <li>▪ For examples, see: <a href="http://www.visitvalemount.ca/contact/itineraries.htm">www.visitvalemount.ca/contact/itineraries.htm</a>; <a href="http://www.tourismsmithers.com/index.php/travel-planner/sample-itineraries">www.tourismsmithers.com/index.php/travel-planner/sample-itineraries</a>; <a href="http://www.tripadvisor.com/Travel-g154943-c3336/Vancouver:British-Columbia:Suggested.Itineraries.For.Vancouver.html">www.tripadvisor.com/Travel-g154943-c3336/Vancouver:British-Columbia:Suggested.Itineraries.For.Vancouver.html</a>; <a href="http://www.aboriginalbc.com/itineraries">www.aboriginalbc.com/itineraries</a>; <a href="http://www.discovercomoxvalley.com/explore/top10/top-10-lists">www.discovercomoxvalley.com/explore/top10/top-10-lists</a>. <a href="http://blog.kenmoreair.com/index.php/2-days-nanaimo-bc/?utm_source=rss&amp;utm_medium=rss&amp;utm_campaign=2-days-nanaimo-bc">http://blog.kenmoreair.com/index.php/2-days-nanaimo-bc/?utm_source=rss&amp;utm_medium=rss&amp;utm_campaign=2-days-nanaimo-bc</a></li> </ul> </li> </ul> </li> <li>• Marketing of Packaged Offers <ul style="list-style-type: none"> <li>○ Utilize all relevant marketing communication vehicles to ensure the prominence of package offers and value-add messaging, including the website and social media.</li> <li>○ Ensure value-add packages are included within the Destination BC Travel Deals program (see <a href="http://www.destinationbc.net">www.destinationbc.net</a> for more details).</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$0</li> </ul>

<b>6.</b>	<b>Promotional Tools &amp; Materials</b>
<b>Objective</b>	Establish a set of promotional tools and materials to support marketing activities.
<b>Description</b>	<p>Consumers require information tools and materials to facilitate their progression through the purchase cycle (Awareness, Interest, Evaluation, Purchase, Loyalty). A set of Southern Gulf Islands promotional tools and materials are required for undertaking marketing activities. Efforts should be applied to ensure the materials are effective and efficient as they can be.</p> <p>Ensure all significant target markets and product experiences are reflected in the branded marketing materials. Tourism Vancouver Island can assist with <i>Explorer Quotient</i> information and training (see page 45).</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Online marketing - Website <ul style="list-style-type: none"> <li>○ Develop URL supporting the Southern Gulf Islands destination.</li> <li>○ Develop a one page landing site for all Southern Gulf Islands promotions – each island website would be featured on this page and visitors can choose their destination(s) of choice. Eventually, this website could evolve to more jointly describe the experiences of the Gulf Islands.</li> <li>○ Develop website content, ensure all content is relevant to the target market reader, showcases the variety of experiences and supports the Southern Gulf Islands key marketing messages. <ul style="list-style-type: none"> <li>▪ Explore using existing Destination BC content on HelloBC.com for the various Southern Gulf Islands destination websites, including editorial content, photographs, driving routes, trip ideas, blogs.</li> </ul> </li> <li>○ Include images that support the key product experiences and target markets. See the Super, Natural BC® brand book for more ideas of imagery (<a href="http://www.destinationbc.ca/Resources/british-columbia-tourism-brand.aspx">www.destinationbc.ca/Resources/british-columbia-tourism-brand.aspx</a>).</li> <li>○ Ensure website is mobile device friendly with responsive design.</li> <li>○ Ensure website usability is current to consumer standards and preferences.</li> <li>○ Highlight: packaged offerings, special offers/travel deals, suggested itineraries, top 10 things to do, unique experiences to the Southern Gulf Islands, welcoming people of the Southern Gulf Islands, difference in summer vs. winter activities, benefits of ferry travel (vs. the cost), etc.</li> <li>○ Work with Destination BC and TVI to ensure their website content is up to date and reflective of the Southern Gulf Islands brand position and experiences. Add all events to HelloBC.com festival and events listings (<a href="http://www.destinationbc.net">www.destinationbc.net</a>).</li> <li>○ Update Galiano, Mayne, Pender and Saturna Islands websites to reflect regional brand.</li> </ul> </li> <li>• Online Marketing – Online Travel Agents <ul style="list-style-type: none"> <li>○ Ensure Gulf Islands is included as a TripAdvisor destination.</li> <li>○ Connect with Trip Advisor directly to discuss opportunities and ensure they understand the goals of the Southern Gulf Islands.</li> <li>○ Write “Traveller Articles” for Trip Advisor to provide travel information.</li> </ul> </li> <li>• Print Advertising <ul style="list-style-type: none"> <li>○ Develop joint marketing collateral for the Southern Gulf Islands: one</li> </ul> </li> </ul>

	<p>Southern Gulf Islands print experiences guide and four island-specific maps (this would replace the four separate island guides).</p> <ul style="list-style-type: none"> <li>▪ Maps are for when visitors are on the island the guide is intended to lure people to the islands.</li> <li>▪ Review the new publication research and examine current practices (see research at Tourism Vancouver Island website <a href="http://www.tourismvi.ca">www.tourismvi.ca</a>).</li> <li>▪ Determine purpose of the guide and ensure it is designed to meet both visitor requirements and business objectives.</li> </ul> <ul style="list-style-type: none"> <li>○ Develop Southern Gulf Islands ads (1/8page, ¼ page, ½ page, full page) for use in cooperative marketing.</li> <li>○ Ensure all existing printed materials, such as beach access maps, are representative of the new Southern Gulf Islands destination brand and includes key messaging and highlights key product experiences and target markets.</li> <li>○ Provide print experiences guide as downloadable PDF on website. Also consider converting to digital guide with click through capabilities.</li> <li>○ Review the <i>Ads &amp; Brochures that Sell</i> guide for information (see <a href="http://www.destinationbc.ca/Programs/Guides-Workshops-and-Webinars/Guides/Tourism-Business-Essentials-Guides.aspx#.Uzm2B61dXlo">www.destinationbc.ca/Programs/Guides-Workshops-and-Webinars/Guides/Tourism-Business-Essentials-Guides.aspx#.Uzm2B61dXlo</a>).</li> </ul> <ul style="list-style-type: none"> <li>• Image Bank <ul style="list-style-type: none"> <li>○ Create and continually update an image bank for both media and marketing use.</li> <li>○ Ensure sufficient material to represent all tourism markets and product experiences throughout the islands.</li> <li>○ Explore the use of the TVI and Destination BC image banks <a href="http://www.destinationbc.ca/Resources/british-columbia-tourism-brand/Image-Bank.aspx#.Uzm3Cq1dXlo">www.destinationbc.ca/Resources/british-columbia-tourism-brand/Image-Bank.aspx#.Uzm3Cq1dXlo</a>. Work in cooperation with the TVI and Destination BC to ensure no overlap or duplication and resources are being leveraged.</li> </ul> </li> <li>• Event booth / Mobile event space <ul style="list-style-type: none"> <li>○ Create a Southern Gulf Islands event booth/mobile event space that can be moved from one island to the other for significant events.</li> <li>○ Ensure eye-catching design that reflects the character of the Southern Gulf Islands as well as the individual islands.</li> <li>○ Ideas include: farm truck (kayak on top?), double decker bus (see Saturna Island, but transportable), mushroom kiosk (by Godfrey Group).</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$20,000 year one for publication redesign, image bank development and event book/mobile event space.</li> <li>• \$5,000 year two and three for enhancements and updates.</li> <li>• Website year one development costs are included in the \$20,000 in Priority Activity #7 Develop Southern Gulf Islands marketing platform. Year two and three enhancements and updates are included within this budget.</li> </ul>

<b>7.</b>	<b>Integrated Promotional Mix</b>
<b>Objective</b>	<p>Create a promotional mix of marketing activities that raise awareness of the Southern Gulf Islands as a travel destination and communicate the attributes of market-ready product in key markets.</p> <p>Improve overall tourism performance by increased awareness, length of stays, overnight stays, visitor spending and overall market share.</p>
<b>Description</b>	<p>Evolve and refine the promotional marketing efforts to ensure the right messages are going to the right consumers at the right time with a goal to influence a decision to visit the Southern Gulf Islands and book a trip.</p> <p>With the continued shift to online, social media and mobile use, efforts should be directed to ensuring the website and online communications reflect the Southern Gulf Islands brand, target markets, product motivations and messaging.</p> <p>Also, with multiple product experiences being offered to different consumer target groups, it would be beneficial to map out an annual communication plan to ensure the right messages are being delivered effectively. A holistic communication plan will ensure all communications—community, stakeholder and consumer target markets—will be leveraged to achieve objectives, in particular, to increase awareness and engagement from industry.</p> <p>Media relations efforts will be used to generate cost-effective awareness building communications. Event marketing activities will be used to ensure existing visitors are aware of the year-round offerings throughout the entire Southern Gulf Islands.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Integrated Content Plan <ul style="list-style-type: none"> <li>○ Implement an annual content and communication plan for all outgoing communications materials e.g., website, social media, newsletters, industry and stakeholder communications, media relations, local government.</li> </ul> </li> <li>• Online marketing <ul style="list-style-type: none"> <li>○ Build an online presence through Search Engine Optimization (SEO) and implement and test SEM (Search Engine Marketing) key word campaigns and strategies against Facebook and other Social Media campaigns.</li> </ul> </li> <li>• Social media <ul style="list-style-type: none"> <li>○ Develop a social media strategy for the Southern Gulf Islands related to travel. Ensure integration of social media tools on website.</li> <li>○ Implement a social media presence for the Southern Gulf Islands, reflective of the brand positioning.</li> <li>○ Establish and cultivate community champions to spearhead social media content creation.</li> <li>○ Develop a Facebook presence for ongoing community engagement and implement best practices for gaining new followers to quickly establish an audience.</li> <li>○ Test use of Twitter for industry communications / updates and feature</li> </ul> </li> </ul>



	<p>highlights of interest to key target markets.</p> <ul style="list-style-type: none"> <li>○ Proactively engage in forums for sector specific target markets, e.g., bird watching, whale watching, naturalists, mushroom pickers, etc.</li> <li>○ Experiment with new tactics and messages to evolve and test communications.</li> <li>○ Create a members calendar of content to feature as part of Integrated Content Plan. Incorporate messaging from Integrated Content Plan.</li> <li>○ Ensure integration of social media tools on website.</li> <li>○ Utilize social media as a component of the media relations strategy.</li> <li>○ Maintain connections with Tourism Vancouver Island and Destination BC social media feeds to ensure support of one another's activities online (@DestinationBC, @TourismBC, @TVIIndustryNews, @TourismVI, <a href="http://www.facebook.com/HelloBC">www.facebook.com/HelloBC</a>, <a href="http://www.facebook.com/vancouverisland.travel">www.facebook.com/vancouverisland.travel</a>)</li> <li>○ Link to YouTube videos about the islands that highlight visitor's experiences with whale watching, kayaking etc. (see <a href="http://www.youtube.com/watch?v=UKVgmJYtlu0">www.youtube.com/watch?v=UKVgmJYtlu0</a> and <a href="http://www.youtube.com/watch?v=NfyVMWuUQnw">www.youtube.com/watch?v=NfyVMWuUQnw</a> for examples)</li> <li>○ Discuss options with Trip Advisor to manage each island destination section with Southern Gulf Islands branding incorporated into the content. Or at a minimum submit photos and traveller articles to provide rich information for potential visitors.</li> <li>○ Monitor Travel forums and online review sites to address questions and determine visitor opinions (Trip Advisor, Yelp, etc.).</li> </ul> <ul style="list-style-type: none"> <li>● BC Ferries <ul style="list-style-type: none"> <li>○ Explore the feasibility of cooperative promotional campaigns to increase awareness and interest of the Southern Gulf Islands as a destination and generate longer or incremental stays.<sup>29</sup></li> <li>○ Advocate for BC Ferries to utilize onboard naturalists to more fully highlight the Gulf Islands National Park Reserve.</li> </ul> </li> <li>● Media relations <ul style="list-style-type: none"> <li>○ Work with Tourism Vancouver Island to develop tools to maximize media opportunities. Develop itineraries, provide story ideas and itineraries to TVI, and ensure relevant content on website to support media efforts.</li> <li>○ Create media section on website: adding pre-written stories, story ideas, suggested itineraries, press releases, contacts, web links and availability of high-resolution scans of photography for print use and B-roll for broadcast, if available.</li> <li>○ Prioritize key market media, including: birders, families, etc., BC and Washington State Travel media.</li> </ul> </li> <li>● Familiarization (fam) Tours <ul style="list-style-type: none"> <li>○ Organize off-season "open door" fams for local residents and visitor centre counselors to increase their local knowledge and become more familiar with the product and experiences within the Southern Gulf Islands.</li> </ul> </li> </ul>
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<sup>29</sup> Note: It is believed BC Ferries and Gulf Islands operators have discussed this in the past. However, due to BC Ferries requirements for year-round rates for packaging, it was not implemented as operators didn't need summer marketing, only off-season. It would be worth exploring again to see if new opportunities or requirements have come up.

	<ul style="list-style-type: none"> <li>○ Organize annual fam tours for Southern Gulf Islands tourism employees at the beginning of the season.</li> <li>○ Conduct media fam tour initiatives with Tourism Vancouver Island, as appropriate.</li> <li>• Events <ul style="list-style-type: none"> <li>○ Explore combining existing community-specific events into more significant offerings to increase the draw to the entire Southern Gulf Islands.</li> <li>○ Explore adding additional features to existing events to encourage attendees to stay long and spend more.</li> <li>○ Support existing events through all marketing vehicles.</li> <li>○ Ensure all events are listed on HelloBC's free events listing: <a href="http://www.hellobc.com/vancouver-island/things-to-do/festivals-events/all-events.aspx">www.hellobc.com/vancouver-island/things-to-do/festivals-events/all-events.aspx</a> (see <a href="http://www.destinationbc.net">www.destinationbc.net</a> for details).</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$30,000 year one, \$55,000 year two, \$70,000 year three.</li> </ul>

<b>8.</b>	<b>Marketing Partnerships and Programs</b>
<b>Objective</b>	Develop a cooperative marketing program and regional partnerships.
<b>Description</b>	<p>The success of community destination marketing is to work in partnership with local business, neighbouring islands and communities and relevant strategic businesses.</p> <p>Partnerships can take a long time to forge, and require ongoing effort to maintain. The Southern Gulf Islands should ensure partnerships are a strategic priority.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Continue to work in alliance and build upon successful partnerships with the community tourism stakeholders throughout the Southern Gulf Islands.</li> <li>• Continue to work in partnership with Destination BC and Tourism Vancouver Island. Explore cooperative marketing opportunities for key target markets. Consider attendance at Wedding Show(s) with other regional partners.</li> <li>• Continue to work closely with Experience the Gulf Islands, Regional Economic Development Commission, Regional Arts Council, Saturna Works and island Chambers of Commerce to cooperatively develop programs and stay up-to-date on all initiatives to avoid duplication of efforts.</li> <li>• Explore partnership opportunities with other islands and communities (Salt Spring Island, Sidney, etc.).</li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$2,000</li> </ul>

## **VISITOR SERVICES**

<b>9.</b>	<b>Community Welcome</b>
<b>Objective</b>	Provide a visitor services and community welcome program to integrate with the destination marketing objectives and provide an outstanding and seamless experience

	for the visitor.
<b>Description</b>	<p>Efforts should be made to ensure the island communities are collectively contributing to creating a positive experience for the visitor that compels the visitor to share their experiences with others and engenders loyalty for a return visit.</p> <p>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 the Southern Gulf Islands and that they are easy to find.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Visitor Services <ul style="list-style-type: none"> <li>○ Continue to provide visitor servicing through the existing visitor centres and kiosks.</li> <li>○ Supply traffic sources (visitor centres, cafes, accommodations, etc.) with tourism information for all of the Southern Gulf Islands.</li> <li>○ Continue to work with Tourism Vancouver Island, learning more about the available marketing programs and ensuring regular communications regarding events, new businesses, media story ideas, etc.</li> <li>○ Explore adopting the San Juan Islands “Island Friendly Spirit” program. For further information, <a href="http://www.sanjuanislander.com/island-newshome/archive/4692-do-you-have-the-island-friendly-spirit?catid=146%3Alocal-business">see http://www.sanjuanislander.com/island-newshome/archive/4692-do-you-have-the-island-friendly-spirit?catid=146%3Alocal-business</a>.</li> <li>○ Develop a system/program of locals being available/friendly to visitors.</li> <li>○ Example, from Sooke: coffee shop baristas and other front line staff wear shirts that say “Ask me, I am a local”.</li> <li>○ Work with WorldHost Training Services to increase service levels within the Southern Gulf Islands. Encourage operators to become WorldHost Recognized Businesses <a href="http://www.worldhosttraining.com">www.worldhosttraining.com</a>.</li> </ul> </li> <li>• Signage <ul style="list-style-type: none"> <li>○ Continue to monitor Islands Trust regulations regarding signage to ensure any necessary signage is available for visitor way-finding.</li> <li>○ Conservation posters are available from the Islands Trust to reinforce the message to visitors about the importance of conservation - <a href="http://www.islandstrust.bc.ca/trust-council/reports-and-publications/visitor-information-posters.aspx">www.islandstrust.bc.ca/trust-council/reports-and-publications/visitor-information-posters.aspx</a></li> </ul> </li> <li>• Connectivity <ul style="list-style-type: none"> <li>○ Work with influencers to improve the wifi/connectivity on the islands, ensuring visitors have access to travel information, sharing via their networks and emergency resources when required.</li> </ul> </li> <li>• Quality Assurance <ul style="list-style-type: none"> <li>○ Provide industry with training on the Southern Gulf Islands brand strategy and highlight key initiatives operators can implement to support and reinforce the brand through quality improvements.</li> <li>○ 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. Potentially have operators sign an MOU in order to receive marketing support.</li> <li>○ Ensure all accommodation operators are aware of the Destination BC</li> </ul> </li> </ul>

	Approved Accommodation program <a href="http://www.destinationbc.net">www.destinationbc.net</a> .
<b>Involved</b>	<ul style="list-style-type: none"> <li>Island representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>\$10,000</li> </ul>

## **DESTINATION AND INDUSTRY DEVELOPMENT**

<b>10.</b>	<b>Industry and Professional Development</b>
<b>Objective</b>	Establish an industry development program that supports the needs of local tourism business operators and organizations.
<b>Description</b>	The brand promise that is made by marketing the Southern Gulf Islands must be in line with the products and services being offered. As the Southern Gulf Islands continue to develop tourism opportunities and outreach to new markets, both individual businesses and the collective industry will require development.
<b>Actions</b>	<ul style="list-style-type: none"> <li>Work with Tourism Vancouver Island and Destination BC to host professional development workshops: <ul style="list-style-type: none"> <li>To improve local understanding of actively participating in online and social media marketing by engaging travellers and generating content.</li> <li>To improve skillsets in Product Packaging.</li> <li>To improve understanding of aboriginal tourism development.</li> </ul> </li> <li>Host workshops focused on providing an exceptional visitor experience, including <i>WorldHost</i>® Customer Service Training and accommodation quality standards.</li> <li>Promote free downloadable <i>Tourism Business Essentials</i> guides to industry stakeholders (see <a href="http://www.destinationbc.ca/Programs/Guides-Workshops-and-Webinars/Guides/Tourism-Business-Essentials-Guides.aspx#.UznVRq1dXIo">www.destinationbc.ca/Programs/Guides-Workshops-and-Webinars/Guides/Tourism-Business-Essentials-Guides.aspx#.UznVRq1dXIo</a>).</li> <li>Promote Tourism Vancouver Island Pro-D Day sessions and other education and training opportunities offered to industry partners (see <a href="http://www.tourismvi.ca/get-informed/education-and-training">www.tourismvi.ca/get-informed/education-and-training</a>).</li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>Island representatives (see Implementation on page 67), Destination BC, Tourism Vancouver Island</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>\$1,000</li> </ul>

<b>11.</b>	<b>Product Development and Enhancement</b>
<b>Objective</b>	Support the Experience the Gulf Islands initiative to create additional product experiences to provide more compelling and enticing packaged travel experiences within the Southern Gulf Islands.
<b>Description</b>	Product development and enhancement is required to encourage visitor volumes, length of stay and spending within the destination, increase visitor satisfaction and repeat visitation. In particular, focus on three key areas: enabling visitors to visit the islands without a vehicle, ensuring the best opportunities for wildlife viewing (land-based, from hiking viewpoints, etc.), and participating in local events / festivals. These experiences support the OCP goals and stakeholder feedback regarding ecologically-sensitive tourism, promoting key natural, outdoor assets and supporting local events.

	<p>As the Experience the Gulf Islands initiative is already being established, it is recommended the product development portion of this plan be implemented by the ETGI group, leaving those representatives focused on this plan to dedicate further resources to the marketing activities. This clear delineation of roles will assist to avoid duplication of effort and scarce resources.</p> <p>Key product development areas include: Trails, Wildlife viewing, Festivals &amp; Events / Arts &amp; Culture, Marine Development, Aboriginal Tourism and Romantic Getaways/Couples Retreats.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Trails - Hiking/Cycling <ul style="list-style-type: none"> <li>○ Support the ETGI proposal to expand the CRD Regional Trail networks and Islands in the Salish Sea Trans Canada Trail Destination Loop.</li> <li>○ Continue to build new iconic hiking trails on each island to enhance the overall Southern Gulf Island destination appeal.</li> <li>○ Explore the enhancement of trails with unique island-specific features, e.g., sculptures, benches, pocket parks/gardens, love-locks, etc.</li> <li>○ Develop unique SGI trail naming conventions, e.g., Whale Trail. Attach a verb/adjective to the trail names (e.g. walking trail, viewpoint trail, etc. to make the trail offerings more appealing).</li> <li>○ Ensure maintenance of key hiking and cycling trails to ensure maximum enjoyment and safety.</li> <li>○ Ensure enroute, on trail signage is available.</li> <li>○ Ensure visitor facilities are in place and maintained, e.g., trailheads, washrooms, parking.</li> <li>○ Work with tourism operators to ensure transportation, accommodations, restaurants and other services are hiking/biking friendly.</li> <li>○ Work with Parks Canada on any news plans for hiking trails.</li> </ul> </li> <li>• Wildlife Viewing <ul style="list-style-type: none"> <li>○ Work cooperatively amongst business owners to share real-time information on whale/wildlife sightings (via marine and land) in order to better enable the chances of visitors seeing whales, and then having them share this experience with others. Twitter, or some other online tool, could be used to alert each other's business owners who then inform their customers.</li> <li>○ Ensure visitor services are provided at prime viewing areas, e.g., signage, platforms.</li> <li>○ Signage could have a Southern Gulf Islands look and feel; make the signage unique to the area.</li> <li>○ Develop interpretative programs to enhance the wildlife viewing at prime viewing areas.</li> <li>○ Offer tools to assist with wildlife viewing, e.g., maps, binoculars, guidebooks, checklists, etc. These can be offered complimentary, for a rental fee or for purchase.</li> </ul> </li> <li>• Festival &amp; Events / Arts &amp; Culture <ul style="list-style-type: none"> <li>○ Develop a few iconic Southern Gulf Island wide events to attract shoulder</li> </ul> </li> </ul>

	<p>season visitors from key markets.</p> <ul style="list-style-type: none"> <li>○ Examples: Southern Gulf Island Regatta and Maritime Festival, Southern Gulf Islands Fall Foodie &amp; Forage Festival, Southern Gulf Islands Spring Slow Cycle Festival, GIMISIPI Race: a race that incorporates each island or that rotates amongst the islands each year, First Nation canoe paddle-a-thon.</li> <li>○ Determine ability to attract current events that move locations, e.g., BC Bike Race.</li> <li>○ Develop a Southern Gulf Islands events calendar that is shared with consumers and amongst industry. This ensures that any new events are designed for times of the year that can manage the visitation and it ensures that all business operators can better inform visitors about activities and events.</li> <li>○ When clustering events it may provide more reasons for visitors to travel to the Southern Gulf Islands. Example: <i>Vancouver Craft Beer Week</i> creates a sense of urgency to visit the cluster of businesses during this week, with special events created during this specific time frame - <a href="http://www.vancouvercraftbeerweek.com">www.vancouvercraftbeerweek.com</a></li> <li>○ Develop itineraries and self-drive tours to support the connection of visitors to arts, culture and heritage products – individually for each island and overall for the destination.</li> </ul> <ul style="list-style-type: none"> <li>● Marine Development <ul style="list-style-type: none"> <li>○ Support the ETGI proposal to enhance the access and services for marine travellers.</li> <li>○ Research funding partners for showers/laundry facilities at key marina/mooring locations.</li> </ul> </li> <li>● Aboriginal Tourism <ul style="list-style-type: none"> <li>○ Work with Aboriginal Tourism Association of BC (AtBC) to develop an assessment of tourism product on the Southern Gulf Islands.</li> <li>○ Work with First Nations on each island and AtBC to identify opportunities for development.</li> <li>○ Support the development of a traditional canoe network between islands, as outlined in the ETGI proposal.</li> </ul> </li> <li>● Romantic Getaways/ Couples Retreats <ul style="list-style-type: none"> <li>○ Create places and spaces on the islands for couples to support the islands as a place for romantic getaways. Examples: couples tree swings, “love lock” display (come up with an island “twist” to this concept. See <a href="http://en.wikipedia.org/wiki/List_of_locations_with_love_locks.">http://en.wikipedia.org/wiki/List_of_locations_with_love_locks.</a>)</li> <li>○ Play up the “secret season” (off season) products (packaging).</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>● Experience the Gulf Islands representatives (see Implementation on page 67)</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>● \$10,000</li> <li>● Influence partner organizations to fund activities that are within their area of responsibility, e.g., CRD parks for enhancing wildlife viewing areas.</li> <li>● Support the Experience the Gulf Islands initiative to apply for grant funds to secure large funds required for major improvements. Coordinate efforts with the projects.</li> </ul>

<b>12.</b>	<b>Transportation Infrastructure</b>
<b>Objective</b>	Remove transportation barriers to visiting and exploring the Southern Gulf Islands.
<b>Description</b>	<p>Inter-island and on-island transportation were identified as key barriers to growth for the Southern Gulf Islands, in particular in connecting the islands making it easier for visitors to explore the entire geotourism destination. While steps have been taken to improve the transportation options, it is critical the tourism industry support these operations to ensure sustainability.</p> <p>BC Ferries was recognized as a threat during the SWOT (strengths, weaknesses, opportunities, threats). Schedule changes and costs were raised as concerns that are negatively impacting the tourism economy in the Southern Gulf Islands.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Inter-island Transportation (between Southern Gulf Islands) <ul style="list-style-type: none"> <li>○ Support inter-island transportation businesses through marketing and promotional efforts and encourage the exploration of sustainable shuttle options.</li> <li>○ Broadly communicate shuttle times and costs through websites, visitor centres, visitor information (e.g., guest directory in rooms), event information, etc. Ensure communication support from tourism organizations as well as all tourism operators and services.</li> <li>○ Support day trips to other islands, incorporate tickets into packaged offerings, e.g., stay 3 nights and receive a complementary shuttle day pass.</li> <li>○ Gather information and research to demonstrate value of service, which may be required for support to ensure sustainable.</li> <li>○ Ensure transportation options are easy to find and understand on tourism organizations and operator websites and communications.</li> <li>○ Ensure performance metrics tracking is in place.</li> </ul> </li> <li>• On-island Transportation <ul style="list-style-type: none"> <li>○ Ensure transportation options are easy to find and understand on tourism organizations and operator websites and communications.</li> <li>○ Lion's Bus: Develop system for obtaining/monitoring feedback from riders on why they are visiting, what they are experiencing and how they heard about the destination. Track ridership to develop baseline statistics.</li> <li>○ Explore car co-ops as an option for islands: <a href="http://www.modo.coop">www.modo.coop</a> or <a href="http://www.zipcar.ca">www.zipcar.ca</a>.</li> <li>○ Gather information and research to demonstrate value of new transportation services, which may be required for support to ensure sustainable.</li> <li>○ Include: car rentals, community buses, bike rentals, moped rentals.</li> <li>○ Share successes and learnings from each island.</li> </ul> </li> <li>• BC Ferries <ul style="list-style-type: none"> <li>○ Develop a working committee tasked with approaching the Tourism Industry Association of BC (TIABC) and MLA regarding assisting with BC Ferries concerns.</li> <li>○ Prepare a brief written document outlining the concerns, impacts, what the Southern Gulf Islands group is prepared to do (i.e., active promotion of destination and BC Ferries), and what the specific request of government</li> </ul> </li> </ul>

	<p>and BC Ferries is.</p> <ul style="list-style-type: none"> <li>• Air <ul style="list-style-type: none"> <li>○ Ensure transportation options are easy to find and understand on tourism organizations and operator websites and communications.</li> <li>○ Develop programs with air transportation providers, examples:</li> <li>○ Incorporate air tickets into packaged offerings, e.g., 10% off round-trip Harbour Air with every stay 3 or more nights.</li> <li>○ Explore packaged offerings for Harbour Air loyalty program point redemptions, e.g., redeem points for accommodation on SGI, not just travel.</li> <li>○ SGI operators to share the use of Seair Seaplanes Frequent Flyer Booklets or Harbour Air Quicktickets to offer customers 10% or more off flights.</li> </ul> </li> </ul>
<b>Involved</b>	<ul style="list-style-type: none"> <li>• Island representatives (see Implementation on page 67), Economic Development Commission, CRD, BC Transit</li> </ul>
<b>Funding</b>	<ul style="list-style-type: none"> <li>• \$2,000 to influence and participate.</li> <li>• Private sector funds will be required to invest in new businesses.</li> <li>• Explore grant or CRD funds to execute pilot projects.</li> </ul>

## 7 Timelines & Implementation Priorities

The following timeline provides a guideline for implementation of the priority activities. It is important to note this Timeline does not include all Actions as documented within the Priority Activity Areas above, but the larger projects that require more significant focus and effort.

It is recommended that the tourism stakeholders (or leads) review the full plan each year and agree on the priority activities for that year based on available and potential resources.

### Year 1

The focus for Year 1 is to begin to work together cooperatively together as the SGI. The priority activities are to secure resources for the implementation of the Tourism Plan, develop the Southern Gulf Island marketing platform, and launch the first collaborative marketing promotions. Also, Year 1 will begin research and performance tracking to establish baselines to measure against for future years.

### Immediate Priority

- Establish clear understanding to work together in a cooperative and collaborative, consumer driven manner.
- Hire a part-time coordinator to manage the execution of the plan, or portions of.
- Develop Southern Gulf Islands marketing platform, including website and 4-6 iconic experiences.
- Develop a social media strategy.
- Implement an annual content and communication plan.



- Secure Funding.
- Develop a process or program to ensure tracking and sharing of performance measurement of industry performance and marketing activity performance.
- Facilitate discussions to ensure the Experience the Gulf Islands project is fully integrated into the tourism plan.
- Provide the CRD and Islands Trust with a copy of this and subsequent Tourism Plans and highlight areas for potential support and engagement.
- Support inter-island transportation businesses through marketing and promotional efforts and encourage the exploration of sustainable shuttle options
- Develop a working committee tasked with approaching the Tourism Industry Association of BC (TIABC) and MLA regarding assisting with BC Ferries concerns.

### **Secondary Priority**

- Create and continually update an image bank.
- Implement a visitor survey for the entire SGI area.
- Coordinate the tourism planning for the Southern Gulf Islands to ensure tourism planning is integrated and collaborative.
- Work with Tourism Vancouver Island to implement the EQ program, to gather additional data on potential visitors.
- Conduct monitoring and tracking of 2014 transportation projects to determine usage and value for tourism economic growth.
- Initiate email updates/newsletters to interested stakeholders.
- Community Engagement
- Work with TVI and Destination BC to host professional development workshops – social media and product packaging.
- Support Product and Development Enhancement through supporting the Experience the Gulf Islands initiative – Trails, Wildlife Viewing, Festival & Events/Arts & Culture, Marine, Aboriginal Tourism.
- Lion's Bus: Develop system for obtaining/monitoring feedback from riders.

### **Year 2**

The focus for Year 2 is to continue with Year 1 efforts, focus on working in partnership with other organizations to further enhance the marketing and begin to develop product development plans.

Year 2 timelines should be reviewed and reprioritized based on the level of successful completion of the Year 1 priorities.

- Review Tourism Plan and update as required.
- Develop programs with air transportation providers.
- Packaging and itinerary development and marketing of packaged offers.
- Develop joint marketing collateral for the Southern Gulf Islands.

- Explore the development of a public relations/media campaign to address the perceptions of the costs of travelling to the islands.
- Work with Tourism Vancouver Island to develop tools to maximize media opportunities.
- Explore combining existing community-specific events into more significant offerings to increase the draw to the entire Southern Gulf Islands.
- Explore adopting the San Juan Islands “Island Friendly Spirit” program.
- Provide industry with training on the Southern Gulf Islands marketing platform 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 marketing platform and expectations of visitors.
- Develop an industry driven code of conduct to help ensure that, as tourism grows, tourism operators and visitors do not negatively impact residents or natural and ecological assets.
- Complete a current *Value of Tourism* visitor study to provide insight on consumer trends and establish a baseline to monitor against in future years.
- Work with TVI and Destination BC to host professional development workshops – aboriginal tourism and WorldHost Training Services.
- Product Development and Enhancement –Romantic Getaways/Couples retreats.

### Year 3

The focus for Year 3 is all about improving the visitor experience. Year 3 timelines should be reviewed and reprioritized based on the level of successful completion of the Year 2 priorities. This Tourism Plan should also be reviewed in Year 3 to determine if it is still relevant or if a new updated Plan is required.

- Create a Southern Gulf Islands event booth/mobile event space that can be moved from one island to the other for significant events.
- BC Ferries - explore the feasibility of cooperative promotional campaigns.
- Organize off-season “open door” fams for local residents and visitor centre counselors.
- Work with influencers to improve the wifi/connectivity on the islands.
- Develop programs with air transportation providers.

## 8 Budget

The following budget should be reviewed on an ongoing basis due to the success the Southern Gulf Islands has in securing additional funds to implement this plan; the plan should be adjusted based on actual funds. The budget should also be reviewed and reallocated annually based on stakeholder input during the annual planning process.

Priority Activity Areas		Year 1	Year 2	Year 3
<b>Tourism Management</b>				
1	Tourism Planning and Management	\$ 15,000	\$ 15,000	\$ 15,000
2	Monitoring and Evaluation	\$ -	\$ -	\$ -
3	Communications /Community Relations	\$ -	\$ -	\$ -
<b>Branding and Marketing</b>				
4	Develop Southern Gulf Islands marketing platform	\$ 20,000	\$ -	\$ -
5	Product Packaging	\$ -	\$ -	\$ -
6	Promotional Tools and Materials	\$ 20,000	\$ 5,000	\$ 5,000
7	Integrated Promotional Mix	\$ 30,000	\$ 55,000	\$ 60,000
8	Marketing Partnerships and Programs	\$ 2,000	\$ 2,000	\$ 2,000
<b>Visitor Services</b>				
9	Community Welcome	\$ -	\$ 10,000	\$ 5,000
<b>Destination and Industry Development</b>				
10	Industry and Professional Development	\$ 1,000	\$ 1,000	\$ 1,000
11	Product Development and Enhancement	\$ 10,000	\$ 10,000	\$ 10,000
12	Transportation and Infrastructure	\$ 2,000	\$ 2,000	\$ 2,000
<b>Total</b>		<b>\$ 100,000</b>	<b>\$ 100,000</b>	<b>\$ 100,000</b>

## 9 Implementation

This plan will be implemented by representatives from the four islands working cooperatively:

- Galiano Island Chamber of Commerce
- Mayne Island Chamber of Commerce
- Pender Island Chamber of Commerce
- SaturnaWorks

Initially, one representative from each organization will be responsible for either implementing on the plan or finding another representative from their island to be responsible:

- Galiano Island Chamber of Commerce – Conny Nordin
- Mayne Island Chamber of Commerce – Andy Pearson
- Pender Island Chamber of Commerce – Janet Laurencelle
- SaturnaWorks – Larry Peck

The next steps in finalizing the plan is to present to the Chamber of Commerce organizations and SaturnaWorks to ensure they endorse and support the plan as organizations.

After the plan has been endorsed by the four organizations, the representatives will work together to begin to implement the plan.

## 10 Appendix

### 10.1 Appendix 1 – Meeting Attendee Lists

#### Galiano Island Meeting Attendees – March 5, 2014

	NAME	ORGANIZATION	EMAIL
1	Richard Dewintez	Galiano Chamber of Commerce	
2	Henny Schnare	Captain's Quarters, Galianofarmtransplants.com, Experience the Gulf Islands, TGI, Chamber	henny@gulfislands.ca
3	Mike Hoebel	SGI Economic Development Commission	mhoebel@telus.net
4	Beth Gauthier	Bellavista, Chamber	bethgauthier@telus.net
5	Paul LeBlond	Galiano Trails Society, museum	<a href="mailto:leblondpaul41@gmail.com">leblondpaul41@gmail.com</a>
6	Ed Andrusiak	Experience the Gulf Islands	ed.andrusiak@gmail.com
7	Ryan McQuillan	Salish Sea Charters	ryan@salishseacharters.com
8	Arnie Bell	EDC – Advisory Group	ajbell@ajbell.ca
9	George Bird	Madrona Lodge	info@madrona-lodge.com
10	Shelley Lawson	Driftwood Village	info@driftwoodvillage.com
11	Debbie Ritchie	Chamber, Fenton Design Jewelry, The George Accommodation	debbie56@shaw.ca
12	Debbie Spees	Hummingbird Pub Restaurant	hummingbirdpub@telus.net
13	Nick Ferrar	Galiano Island Books	nick_ferrar@hotmail.com
14	Conny Nordin	Galiano Oceanfront Inn and Spa	c.nordin@galianoinn.com

#### Mayne Island Meeting Attendees – February 18, 2014

	NAME	ORGANIZATION	EMAIL
1	Tina Farmilo	Trincomali Community Arts Council of the Southern Gulf Islands – Maybe chapter	tinafarmilo@shaw.ca
2	Andrew Ferneyhough	Trincomali Community Arts Council of the Southern Gulf Islands – Maybe chapter	bedowynn@gmail.com
3	David Choquette	Bennett Bay Bistro	bennettbaybistro@gmail.com
4	Colleen Wadsworth	Bennett Bay Bistro	bennettbaybistro@gmail.com
5	Andy Pearson	Mayne Island Community Chamber of Commerce (MICCC)	aandycarm@aol.com
6	Mike Maxwell	Mayne Island Car Show	mikemaxwell@shaw.ca
7	Brian Dearden	Home Hardware / MICCC	bdearden@shaw.ca
8	Brian Crumblehulme	Former tourist owner / elected	briancottage@gmail.com

9	Carmen Pearson	Blue Vista Resort	bluevista@bluevistaresort.com
10	Lorie Brown	Gardenia Home & Garden Shop	gardenia@shaw.ca
11	Millie Leathers	A+ Guesthouse on Bayview	millieleathers@shaw.ca
12	Dave Hinton	Mayne Island Resort	dave@mayneislandresort.com
13	Doug Peers	Bennett Bay Kayaking	info@bennettbaykayaking.com
14	Leslie Peers	Bennett Bay Kayaking	info@bennettbaykayaking.com
15	Barbara McIntyre	Nomads Essentials	Barbara@nomadicroutes.com
16	Richard Jarco	Fernhill B&B	richardjarco@gmail.com

#### Saturna Island Meeting Attendees – February 17, 2014

	NAME	ORGANIZATION	EMAIL
1	Bob Fitzgerald	Saturna Point Holdings / Lighthouse Pub	saturna.point@gmail.com
2	Teresa Higgins	Arts Saturna	teresa@weavingbyteresa.com
3	Katie Jones	Wild Thyme Coffee House	saturna-girl@hotmail.co.uk
4	Karen Muntean	Arts Saturna	kmuntean@gmail.com
5	Larry Peck	SIMRES / Saturna Works	sail@meriah.com
6	Ron Monk	Saturna Works	rmreservices@gmail.com
7	Michele Buchignani	Sandy Bay B&B	rick@sandybaysaturna.com
8	Paul Brent	Islands Trust / Rec Centre	pbrent@mac.com
9	John Robertson	Saturna Cottage	robertsonjf@gmail.com
10	Inglid Gaines	Sunset Beach Cottage Rentals	sunsetbeach@saturnacan.net
11	Amber Jensen	Four Winds B&B	info@fourwindsb-b.com
12	Laura Swan	Saturna Lodge / SITA	innkeeper@saturna.ca
13	Nancy Angermeyer	Art Saturna / SITA / Fog Alarm Building	nancy@nancyangermeyer.com
14	Michelle Davies	Darryl's & James' Dig	michelleonsaturna@gmail.com

#### Pender Island Meeting Attendees – February 18, 2014

	NAME	ORGANIZATION	EMAIL
1	Mike Dine	Pender Island Fire Rescue (PIFR)	deputychief@penderfire.ca
2	Wendy Gardner	Southern Gulf Islands Economic Development Committee / Regional Arts Council	imwendygardner@gmail.com
3	Anna Katsioras	Beach House B&B	<a href="mailto:annakatsioras@shaw.ca">annakatsioras@shaw.ca</a>
4	Lou Henshaw	Beach House B&B	<a href="mailto:lhenshaw@shaw.ca">lhenshaw@shaw.ca</a>
5	Janet Laurencelle	Shangri-La Oceanfront B&B / Chamber	<a href="mailto:jdellal@shaw.ca">jdellal@shaw.ca</a>
6	Charlie Boyne	Pender Island Fire Rescue	<a href="mailto:chief@penderfire.ca">chief@penderfire.ca</a>
7	Jane Perch	Coach House in the Cove / Chamber	<a href="mailto:Pacific.cove@shaw.ca">Pacific.cove@shaw.ca</a>
8	Leeanne Mueller	Garden Song / Chamber	<a href="mailto:llmueller@shaw.ca">llmueller@shaw.ca</a>
9	David Goudge	Sea Star Vineyards	<a href="mailto:davidgoudge@me.com">davidgoudge@me.com</a>

10	Mamie Hutt-Temoana	Salmonberry Inn	mamielht@gmail.com
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#### Joint SGI meeting in Sidney – May 29, 2014

	NAME	ORGANIZATION	EMAIL
1	Ed Andrusiak	Experience the Gulf Islands	ed.andrusiak@gmail.com
2	Sheila Midgley	Harbour Commission, SGI Economic Development (Arts & Culture)	<a href="mailto:kingfisher@gulfislandswireless.com">kingfisher@gulfislandswireless.com</a>
3	Michael Hoebel	SGI Economic Development Commission, Experience the Gulf Islands	mhoebel@telus.net
4	Henny Schnare	www.galianogulfislands.ca, www.farmtransplants.com, Experience the Gulf Islands, TGI, Galiano Chamber of Commerce	henny@galianogulfislands.ca
5	Toby Snelgrove	Mayne Island Community Chamber of Commerce (MICCC), Mayne Tours and Charters, Toby Snelgrove Photography	toby.snelgrove@mac.com
6	Andy Pearson	Mayne Island Community Chamber of Commerce (MICCC)	aandycarm@aol.com
7	Karen Muntean	Arts Saturna	kmuntean@gmail.com
8	Mamie Hutt-Temoana	Salmonberry Inn	mamielht@gmail.com
9	Janet Laurencelle	Shangri-La Oceanfront B&B / Chamber	<a href="mailto:idelial@shaw.ca">idelial@shaw.ca</a>
10	Larry Peck	SIMRES / Saturna Works	sail@meriah.com
11	Paul Brent	Islands Trust / Rec Centre	pbrent@mac.com
12	Ken Hancock	Islands Trust	khancock@islandstrust.bc.ca
13	Conny Nordin	Galiano Oceanfront Inn and Spa	c.nordin@galianoinn.com
14	Beth Gauthier	Bellavista, Chamber	bethgauthier@telus.net

## 10.2 Appendix 2 – BC Ferry traffic statistics by island

### Vehicle Traffic Embarkations – Southern Gulf Islands, by island

#### Route 5

	Swartz Bay	Pender	Saturna	Galiano	Mayne
2010	123,633	69,955	14,770	24,153	26,889
2011	117,989	65,763	14,786	22,642	26,145
2012	114,784	64,130	14,403	21,877	25,308
2013	112,197	63,041	13,591	20,875	25,024
2014	112,738	63,314	13,239	20,888	25,878

#### Route 9

	Tsawwassen	Salt Spring	Pender	Galiano	Mayne
2010	78,350	30,776	14,278	21,691	17,783
2011	74,541	28,803	13,944	20,659	16,524
2012	71,434	27,497	13,714	19,669	15,684
2013	71,235	26,881	12,789	19,434	15,390
2014	67,269	26,580	11,782	18,897	14,945

### Passenger Traffic Embarkations – Southern Gulf Islands, by island

#### Route 5

	Swartz Bay	Pender	Saturna	Galiano	Mayne
2010	236,484	138,178	31,258	45,120	49,147
2011	225,722	130,874	30,792	42,077	48,342
2012	220,077	128,622	30,398	40,193	46,698
2013	216,282	127,257	29,286	38,878	46,115
2014	215,440	125,456	28,129	38,295	47,692

#### Route 9

	Tsawwassen	Salt Spring	Pender	Galiano	Mayne
2010	235,670	80,416	32,986	69,888	51,958
2011	223,670	75,421	31,037	65,713	45,584
2012	218,345	72,880	31,066	64,460	47,831
2013	220,616	72,569	29,532	64,383	47,739
2014	208,197	72,079	27,160	62,916	45,905

## 10.3 Appendix 2 – Organizations supporting tourism marketing

### All Islands

- Capital Regional District
- BC Parks
- Parks Canada
- Regional Arts Council
- Driftwood Publishing (website, newspaper, visitor guide)
- Go Island TV (Shaw)
- Island Tides Newspaper
- Tourism Vancouver Islands
- Victoria and the Gulf Islands
- Destination BC

### Galiano Island

The Chamber of Commerce is largely tourism-focused as 99% of the businesses are tourism dependent. The Chamber has been a Tourism focused organization for more than thirty years; it originally was more broadly business focused but economic changes made a change to a tourism group. The Chamber has a mandate to support and develop business and community on Galiano. The role of the President is the lead role in Tourism initiatives and is supported by 8 other board members.

Other organizations involved include: Active Page, local Parks and Recreation Commission, BC Parks - campground, Trincomali Community Arts Council, Galiano Museum Society, Galiano Market Society, Galiano Conservancy, Trails Society, The Galiano Club.

### Mayne Island

The Mayne Island Community Chamber of Commerce (MICCC) has been involved in tourism for over 10 years. The mandate for the 4-member Board of Directors is to encourage visitation to the island and enhance the overall business climate on Mayne. Chamber membership provides funding for the annual \$18,000 annual budget. The Chamber represents approximately 65 local businesses that have evolved over the past 5 years into a group representing about 80% of the private businesses on the island of which about 70% are wholly or partially dependent on tourism. Additional funds are obtained through Chamber fundraisers and brochure advertising.

Other organizations involved include Mayne Island Parks and Recreation Commission.



## **Pender Island**

The Pender Island Chamber of Commerce has been involved with tourism for over 10 years. The mandate for the 7-member Board of Directors is “To provide our local business community with a means to promote our area to the outside world and to make our community a better place to live.” The Commerce has a 3-person tourism sub-committee, in existence for 5 years, that is examining tactics to promote Pender Island through a website, social media, print ads and brochures. The Chamber’s almost 100 businesses provide a budget of just over \$30,000 (in total, not just specific to tourism). Additional funds are obtained through chamber benefits and cooperative funding programs such as the Destination *BC Community Tourism Opportunities* program.

Other organizations involved include BC Ferries – Packages and Getaways.

## **Saturna**

Tourist operators wishing to collectively market themselves, and Saturna Island, as a tourist destination, organized the Saturna Island Tourism Association approximately 15 years ago. The organization currently has approximately 12 active participants who are supportive residents, business owners or tourism operators. The organization has been active since the early 1990’s but participation has been declining in recent years. There is a silent auction at the annual Lamb BBQ as well as membership fees sold to about 30 interested or actively involved Saturna residents. These funds support the costs for brochures and website.

Other organizations involved include: SaturnaWorks (Saturna Island Economic Development Initiative), the Lions’ Club, Scribbler, Saturna Island Marine Research & Education Society (SIMRES).

## 10.4 Appendix 3 – Meeting Notes re Priority Votes

### Galiano Island:

- 13 votes: Develop off-season: events (e.g. sports car rally); romantic weekend getaways (13 votes)
- 8 votes: Experience the Gulf Islands initiative
- 5 votes: Easier, cheaper, more frequent access
- 5 votes: Improve transportation on-island, inter-island, foot passengers, car stop, car co-op concept
- 3 votes: Improve cell coverage, connectivity
- 3 votes: Media: film/videos about artists, festivals, experiences, earned media
- 3 votes: Formalize structure to cooperate for networking; develop partnerships and packages; (e.g. stakeholder open houses occurred last year)
- 2 votes: Advocacy for BC Ferries – position paper from DBC; coordination between all stakeholders and lobby
- 1 vote: Building retreats markets: corporate, incentive market, other
- 1 vote: Year-round amenities, activities and services
- Develop friendly STVR rentals
- Minimum 3-night stay on weekends (currently some 2-night minimums)
- Staffing - housing, plans
- Mid-week market (in addition to Saturday market)

### Mayne Island:

1. 11 votes: Branding – Mayne / SGI – differentiate and identification of products; the hub of SGI, climate, part of Vancouver Island region
2. 7 votes: Develop/repair/maintain facilities for small boats (sailboats, kayaks, etc.) on and between islands
3. 6 votes: Develop Gulf Islands packages (accom and experience activities)
4. 6 votes: Coordinate between islands – organized, structure / Create a unified plan and monitor it – communication system amongst islanders (communication network)
5. 4 votes: Address value and BC Ferries challenges – make it worth to come to – part of experience to get here
6. 3 votes: Centralized Gulf Islands website
7. 2 votes: Info Centre off ferry – booth, counsellor, etc.
8. 1 vote: Trail system development
9. 1 vote: Off-season theme e.g. Tofino storms
10. 1 vote: Gulf Island event (one event, multiple islands) – brings citizens and visitors together

11. Realize needs of the different demographics/markets and meet those needs (product and services)

Pender Island:

1. 8 votes: Branding – Pender Island and Southern Gulf Islands
2. 7 votes: Promote off-season (Mediterranean climate; eco-diversity and micro-climates)
3. 5 votes: Champion/leader and driving force for change
4. 5 votes: Community education – understanding value of tourism and positive benefits of tourism; messaging to visitors. Community includes Islands Trust, CRD
5. 4 votes: Pender promotion – confusion about Pender Island and Pender Harbour
6. 3 votes: Change public perception of BC Ferries
7. 1 vote: Boating community – capitalize (marina, docks, etc.)
8. Transportation to connect inter-islands
9. Secure funding
10. Collective vision

Saturna Island:

1. 7 votes: Saturna Island recognition and Saturna brand; increase awareness; advertising and promotion
2. 7 votes: Social media staff person; Media and online representative
3. 7 votes: Hiking trails expanded; Circle tours, inter-island
4. 4 votes: Mariners destination; develop resources – e.g. showers, laundry, increase marina size (mooring), Regatta – visit 3 islands, climb each mountain, drink one beer
5. 4 votes: Group Marketing; weddings, birders, etc.
6. 4 votes: Coordination and collaboration between Saturna Island organizations
7. 3 votes: Job creation; Pay people instead of volunteer
8. 3 votes: Motivate movement between islands; Southern Gulf Islands branding and identity
9. 2 votes: Broader target families
10. 1 vote: Bike Trails (*Note: Parks Canada currently prohibits bike use in parks*)
11. Create a hostel – place to stay
12. Goat Karts

SGI Meeting – May 29, 2014

1. 9 votes: Website – SGI
2. 6 votes: Inter-island transportation
3. 4 votes: Visitor Experiences Survey
4. 3 votes: Content Plan
5. 2 votes: CRD/Islands Trust
6. 2 votes: Media Relations
7. 2 votes: Product Packaging

8. 2 votes: Online Marketing
9. 1 vote: Value of Tourism Study
10. 1 vote: Other Partners – ETGI, etc.
11. 1 vote: Community Tourism Stakeholders
12. 1 vote: Tourism Vancouver Island