



DESTINATION
BRITISH COLUMBIA

DESTINATION DEVELOPMENT STRATEGY FRAMEWORK NORTH VANCOUVER ISLAND PLANNING AREA

Discussion Paper November 2017

Purpose of Strategy Framework

This framework document is designed to stimulate discussion on destination development priorities. The process has been facilitated by Destination BC and is focused on supply factors that impact the competitiveness of a destination. It identifies the guiding principles that should underlie the plan, the aspirations for the region, and the key attributes of North Vancouver Island (NVI) – as discussed in previous workshops. On the basis of these discussions, a range of strategic issues and priorities have been identified. These now need further discussion and agreement on how they should be addressed over the coming 10-year period.

The emphasis has been on identifying priorities that are regional in nature. While they may be of regional significance, it is recognised that the focus of effort may vary across NVI and that a regional priority may require more localised responses.

Purpose of Plan

- To support the provincial program goals:
 - To make BC the most highly recommended destination in North America
 - To create strategic 10-year plans for tourism development and improve return-on-investment for government and private sector investments in tourism assets
 - To elevate BC's ability to compete as a premium destination while making the province more attractive for investment
- To create a plan that will:
 - Provide strategic direction for the region and will be used to inform local and regional planning
 - Enhance stakeholders' ability to leverage related initiatives
 - Establish the basis for joint action and inter-community dialogue

INFRASTRUCTURE, TRANSPORTATION &
ACCESS + signage, investment attraction etc.

VISITOR EXPERIENCE and PRODUCT
DEVELOPMENT + SENSE OF PLACE

POLICY & REGULATORY CONTEXT – land use
planning, Crown land, marine

INDUSTRY DEVELOPMENT– capacity,
partnerships, labour, quality...

Guiding Principles

It is agreed that the Destination Plan:

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

Vision

The 10-year vision statement has been written as a two-part statement. The initial phrase relates to the visitor experience and destination, and the secondary phrase relates to the aspirations for the tourism industry within the region.

North Vancouver Island will be recognized globally for its unique terrain, coastline, wildlife and ecosystems; its marine and land-based adventure; its year-round opportunity to be immersed in the atmospheric solitude of the wilds; the Indigenous culture; and the welcoming range of distinctive communities that portray an engaging array of coastal lifestyles and traditions.

The tourism industry will work in responsible collaboration with all partners, rights holders and levels of governments to ensure that the region's inherent environmental and cultural values are respected and that the visitor is truly inspired by its warmth of hospitality and its emphasis on delivering remarkable experiences.



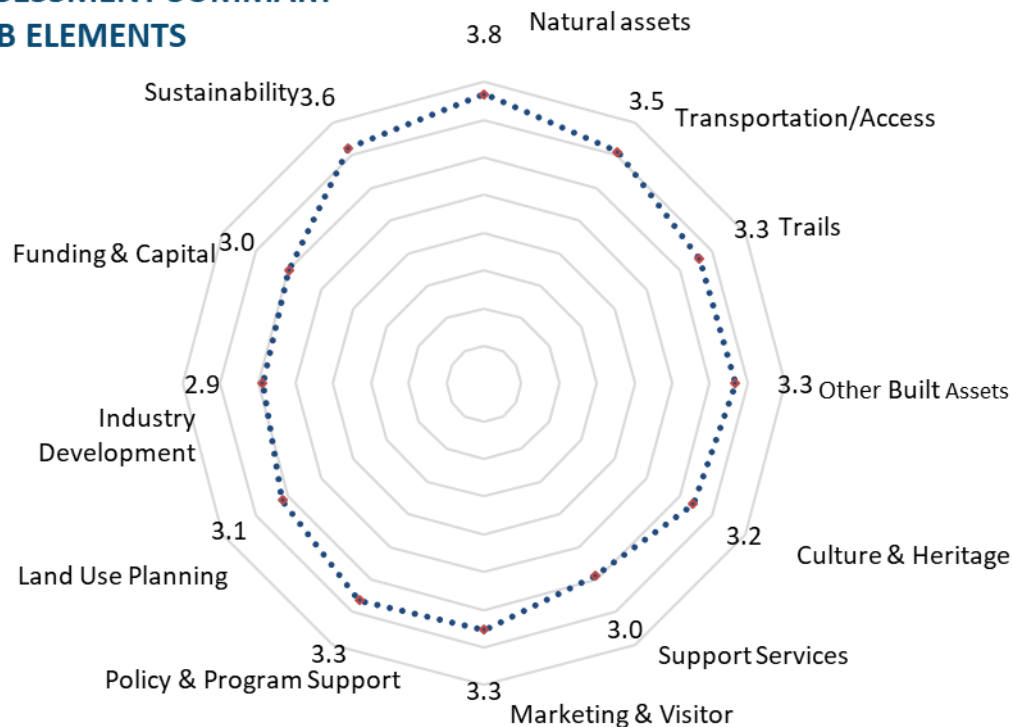
Authentic Friendly
 Bountiful Gritty Small-scale human-scapes
 Trust Passion Space to Accessible
 Wild Composite breathe & remote
 Inspiring experience Relaxed
 Islands & inlets Energising Rugged
 Spiritual Responsible

Our key attributes

Understanding the attributes and personality of the destination provides the basis for identifying priorities that will build on these strengths.

The assessment on the following page provides further detail on the planning area.

ASSESSMENT SUMMARY SUB ELEMENTS



North Vancouver Island Destination Assessment

Destination audit

Understanding the competitive strengths and areas of concern is an important first step in setting directions for the next 10 years. An assessment of the planning area was carried out using a new audit tool. The tool is based on 130 questions. Seventy-two respondents completed the survey. On the basis of the results, scores out of 5 have been determined for a series of 'main elements' that contribute to competitiveness. Each element was 'assessed' through a range of relevant statements. A further series of sub-elements were also scored. (The sub-element table shows the number of statements relating to each element and the average score).

The respondents rated the questions from 1 for 'strongly disagree' to 5 for 'strongly agree'. The higher the score, the stronger the element as perceived by the stakeholders who responded to the survey.

Assessment Summary - Main Elements	Total # of Statements	Average Score (Max=5)
A. DESTINATION READINESS	26	3.6
B. TOURISM ASSETS AND EXPERIENCES	60	3.3
C. SUPPORT SERVICES INFRASTRUCTURE	9	2.9
D. ENABLING CONTEXT	35	3.2
GRAND TOTAL	130	3.3

Summary of key strengths, challenges and opportunities

- Wealth of marine assets – unique coastline, karst caves, beaches, islands and inlets
- Wide range of marine experiences and quality eco-tourism operators
- Distinctive temperate rainforest
- Mountain peaks and related scenery
- ‘Wild encounters’ – marine and land-based – whales, otters, birdlife, bears, sport fishing, trails
- Rich Indigenous culture and First Nations committed to developing tourism
- Range of alpine / Nordic ski settings
- Birth of ‘British Columbia’ story
- Range of authentic communities
- History of industry, trade, world wars

STRENGTHS

- Alignment of destination experience with expectations
- Seasonality + lack of product outside of peak season
- Inconsistent visitor services
- Reluctance of locals to embrace tourism
- Labour availability and insufficient access to training
- Insufficient support for small businesses
- Lack of collaboration
- Transportation linkages + weak air access
- Insufficient emphasis on wildlife protection
- Tourism not at the wider planning table
- Land tenure issues
- BC Parks – need to update management plans
- Issues relating to territory/reconciliation
- Accommodation issues
- Telecommunications

CHALLENGES

- Developing a seamless focus
- Trails-related experiences
- Emerging Indigenous experiences & focus on tourism development
- Community engagement
- Enhanced collaboration between all partners
- Strengthened focus on culture & heritage and related stories
- Enhanced wilderness experiences – new infrastructure
- Industry-led training
- Cycling experiences
- Culinary experiences
- Integrated policy planning + framework for access
- Ongoing emphasis on sustainability + global recognition for responsible whale watching
- Marine trail

OPPORTUNITIES

Environmental factors

The importance of managing growth and ensuring the long-term ecological diversity of the region and protection of its physical assets is a recurring theme in the discussions on tourism development. The health of the salmon and the whale population are seen as critical indicators of the marine environment, while the need to preserve scenic beauty and integrate the concept of sustainability more effectively into all planning discussions was highlighted. Issues included;

- Insufficient emphasis on wildlife protection.
- Lack of appropriate data for policy development.
- The need to emphasise watershed management.
- Balancing the consumptive versus non-consumptive recreational use of assets – hunting versus wildlife viewing.
- Importance of maintaining visual quality objectives.
- The need to ensure that the voice of the wilderness tourism advocates is adequately heard at senior levels of government.
- The need to develop planning processes that ensure regular review and updating of land-use plans – such as the Vancouver Island Land Use Plan, and BC Parks plans.
- Scope to advance the environmental focus through green certification for businesses and global recognition for responsible whale watching (World Cetacean Alliance).
- Need for in-town recycling services.

Statement	TRAILS	n	Rating
The destination has an attractive range of trail systems that draw visitors to the area		51	4.0
There are attractive trail systems for hiking		51	4.2
There are attractive trail systems for mountain biking		51	4.0
There are attractive trail systems for motorized activities such as off-road vehicles and snowmobiles		51	3.2
There are attractive trail systems for horseback riding		51	2.9
There are attractive water-based trails for canoeing and kayaking		51	2.9
There are attractive trail systems for winter activities		51	4.1
The trails are well managed and maintained		51	2.9
There are no significant issues associated with conflict between users or with other economic activities on the trail systems		51	3.4
The trails are well signed		51	2.9
Trail infrastructure and supportive amenities such as huts have been developed		51	2.5
Access to trail heads for the area's top trails is good and parking is adequate		51	3.4
There is good connectivity between trails within the region and beyond the region		51	2.8
Gaps in the trail networks have been identified and strategies are in place to address these gaps		51	3.1
Trails have been improved to provide access to visitors with disabilities		51	2.7
The stories associated with the trails across the destination have been identified and documented and are interpreted for visitors through signage, brochures, online stories and other communications tools		51	2.9
Trail experiences have been developed and integrated with other adjacent attractions and complementary experiences such as a visit to a local winery		51	2.5

Trails

The trail system is an integral element of the overall destination experience, with iconic trails such as the North Coast / Cape Scott Trail and key assets with further potential such as the Nookta Trail and the Oolichan Trail or Grease Trail.

Areas of consideration:

- Connectivity between trail systems (2.8) and improving way-finding.
- Looking at trails as part of a wider framework for land access.
- Trail infrastructure and supportive amenities (2.5) – such as huts.
- Identification of stories and interpretation through signage and technology.
- Increasing accessibility of select trails.
- Managing capacity concerns and demand on peak weekends on Cape Scott park and trail.
- Managing user conflicts.
- Developing further opportunities for ATVs.
- Year-round maintenance.
- Visitor information – including information on accessing trails and using gravel roads.
- Leveraging the TVI project on trails – includes setting up sub-regional working group, continuing to develop the inventory, highlighting iconic trails, addressing accessibility/mobility issues on select trails, improving amenities and focusing on developing hut-to-hut experiences.

Statement	PLANNING AND POLICY	n	Rating
Local governments are proactive in encouraging the development of tourism		46	3.4
First Nations government/leadership are proactive in facilitating the development of tourism		46	3.3
Land-use planning plays a supportive role in the development of tourism		46	3.1
Agricultural Area Plans actively support the strategic development of agritourism		46	2.8
Regional Growth Strategies support the strategic development of tourism		46	3.4
There is strong political support for the tourism industry		46	3.4
There is strong community support for the tourism industry		46	3.7
Local governments are actively supported through input and dialogue with tourism advisory committees or boards		45	3.5
Provincial Government ministries and agencies are knowledgeable of the destination and are actively involved in tourism development		46	2.6
The Province's Crown land policies support the development of tourism		46	2.9
The Province's Crown land policies support backcountry operators		46	2.7
The management plans for designated landscapes that benefit tourism (e.g. Provincial Parks) are current and seek to optimize the relevant assets		46	2.8
The Municipal and Regional District Tax is in place throughout the entire destination		46	3.8

Planning and Policy

It is felt that tourism is not typically at the table when it comes to planning for other sectors such as transportation at all levels of government and that the industry has insufficient ability to influence policy development. Concern was expressed both in the audit and in the workshops, that government ministries and agencies are not sufficiently knowledgeable of the area from a tourism perspective and could play a stronger role in tourism development (2.6).

Additional areas of considerations include:

- The need to strengthen all policies relating to transportation – linkages between communities, air access to the region, the activities of BC Ferries (scheduling, routes,), and the need to build cycling into these policies, given the growth of this sector and the potential to leverage it.
- Safety issues with regard to the highways and increasing concerns regarding the anticipated growth in logging trucks using the highways (Western Forest Products)
- Marine policies relating to derelict vessels and marine infrastructure.
- First Nations' reconciliation process – dealing with the uncertainties that it may raise.
- Land tenure processes – e.g. competing uses, take-backs and lack of compensation.
- Developing a framework for land access, including policies regarding the non-deactivation of forest roads. Potential to consider this from a province-wide perspective.
- Backcountry stewardship policy and enforcement issues – a need to review current management plans within the context of visitor management and access.
- The need to look at the linkages between BC Parks and experiences outside of parks to encourage greater levels of collaboration.
- Communications between ministries and tourism on the ground and between ministries themselves on tourism – a need for improved dialogue regarding tourism and a stronger tourism emphasis within all ministry mandate letters.
- A need for a more integrated approach to planning, including an enhanced understanding of how First Nations plans for tourism will support the overall competitiveness of the region.

Statement	ACCOMMODATION & URBAN INFRASTRUCTURE	n	Rating
The destination offers a variety of quality fixed-roof accommodation facilities		47	3.4
The accommodation inventory includes branded hotel chains well known to international visitors		47	2.0
There is adequate quality fixed roof accommodation for peak season		47	2.7
A significant number of new rooms have been developed in the past five years across the destination		47	2.8
There are adequate public camping facilities (provided by the Province or Parks Canada)		47	2.9
There are adequate commercial (privately owned) camping facilities		47	3.5
The evening economy is strong (evening entertainment)		51	1.9
Dining opportunities at a range of price points are readily available		51	2.8
The retail shopping experience is a key aspect of the overall visitor experience		51	2.3
The visitor is well serviced by Visitor Services that let guests know what is available, such as visitor centres, roaming ambassadors, etc.		51	3.7

Accommodation & Urban-based Infrastructure

There is general concern regarding the quality, availability and diversity of accommodation in select areas. While new product has been developed/upgraded, such as the Kwa'lilas Hotel in Port Hardy, and plans are in place to develop additional opportunities – e.g. the expansion of Telegraph Cove Resort and an anticipated increase in public campsites, this remains an area of tourism infrastructure that needs to be reviewed. Points to consider:

- Encouraging the ongoing growth of B&Bs, ensuring that the need to deliver quality is fully understood.
- Identifying mechanisms to facilitate and support upgrades to existing accommodation and camping facilities, including increasing the availability of full-service camping and RV facilities. Accommodation in North Island in particular, requires further investment.

- Meeting the demand for F&B in remoter locations.
- Lack of municipal service agreements with First Nations and developers in outlying areas.
- Need to expand operating hours on visitor-related services, including information services.

Transportation and Connectivity

A range of factors need to be reviewed, including:

- Internal transit challenges – between communities.
- Air connections and a lack of direct flights with Vancouver, Victoria and Seattle.
- No direct inter-island air options.
- Connecting transportation with ports and airports is inadequate.
- A need for cycle infrastructure to be developed alongside other transport infrastructure.
- A need for an increase in pull-outs and rest stops + information on how to drive the gravel roads.
- Limited infrastructure for electric cars.
- Opportunity to create ferry circle route packages – vessel improvements on the Sointula/Alert Bay route will help.
- Shortage of marinas, boat launches and other marine services, including gas services – insufficient contingencies in the case of poor weather. Inability of small communities to maintain docks.
- Limited internet and cell coverage on highways and backroads.

Industry Development

A wide range of concerns were raised with regard to the labour market, enterprise facilitation, general community engagement, and the need for a greater level of collaboration. These included:

- Quality of life for tourism employees in terms of housing issues, levels of remuneration.
- Shortages of skilled and unskilled resources – seasonal staffing challenges, transient workers, retention issues + insufficient access to training; unwillingness to utilize WorldHost; gap between industry's view of good services and visitor expectations.
- Lack of focus on experience delivery – not tying product into place + slow to adapt to new technology
- Lack of entrepreneurial support for SMEs; succession planning issues; lifestyle issues limiting growth
- Value of tourism not fully understood by communities.
- A need for a stronger culture of hospitality.
- Insufficient collaboration between operators, communities, municipalities and First Nations – need for greater levels of communication, trust, and improved understanding regarding protocol agreement between operators and First Nations.

Visitor Experience

While the destination audit did not indicate any particular low/average scores for statements relating to the visitor experience, other than for agritourism (2.7) and the destination's reputation for local foods and culinary tourism (2.6), the workshop discussions highlighted a number of concerns. These included:

- Insufficient product outside of peak season and lack of capacity and support services within peak season.

- The experience is not always aligning with visitor expectations.
- Inconsistent visitor services – need to improve knowledge on regional products and experiences, particularly First Nations experiences.
- Insufficient use of technology.
- Inconsistent mapping and way-finding.
- Insufficient use of interpretation and limited story-telling + overgrown viewpoints.
- Visitor management concerns and capacity issues at key sites in peak season.
- Difficult to find multi-day itineraries and tour experiences online.
- Lack of support from secondary businesses such as gas stations.

A key concern relates to perception that many visitors hold of North Vancouver Island – seeing it as a staging area rather than as a destination in its own right.

In looking at product development opportunities, the following should be considered in addition to cycling and other initiatives already identified (this is not an exhaustive list):

- Sport fishing.
- Product development opportunities for remote communities and how this is integrated with the wider North Vancouver Island experience.
- Winter recreation and the potential to build on existing resources associated with Mount Washington Alpine Resort and Mount Cain Alpine Park.
- Developing export-ready trail experiences – particularly in North Island.
- Role of technology in enhancing experiences and delivery of services.

Products, experiences and markets

An assessment of products and experiences by EQ markets provides a further context for destination development. The table below has clear implications for destination development and management.

Activities	Interest Level			Relative Importance	Experience Rating ^a	Potential Management Direction
	Authentic Experienter	Cultural Explorer	Free Spirit			
• Marine wildlife viewing	80%	81%	76%	Primary	5	<ul style="list-style-type: none"> Extended seasons Expanded viewing of non-traditional species New transport modes (e.g. low-pollution electric boats)
• Seeing beautiful coastline, beaches	74%	-	71%	Primary	5	<ul style="list-style-type: none"> Interpretive and learning experiences Improved beach access, parking, signage
• Dining at restaurants offering local ingredients	74%	78%	71%	Primary	3	<ul style="list-style-type: none"> Links to festivals and events Farm to table initiatives
• Visiting national/provincial parks to see wildlife	72%	77%	70%	Primary	3	<ul style="list-style-type: none"> Improved access and wayfinding to high-value use areas Increased interpretive programming
• Land-based wildlife viewing	78%	78%	69%	Primary	4	<ul style="list-style-type: none"> Inventory of viewing sites Self-guided tours
• Visiting aquariums and zoos	-	-	67%	Secondary	1	<ul style="list-style-type: none"> Greater interpretation of unique ecosystems and species
• Visiting national/provincial parks visitor centres	71%	75%	66%	Secondary	3	<ul style="list-style-type: none"> Extend packaging for these facilities Investment in technologies and experiential learning
• Visiting well-known natural wonders	72%	76%	66%	Secondary	4	<ul style="list-style-type: none"> Access infrastructure New tour experiences
• Staying at a waterfront resort	-	-	65%	Secondary	5	<ul style="list-style-type: none"> Niche resorts, underwater hotels Curated adventures for existing facilities
• Mountain and glacier viewing	-	-	65%	Secondary	5	<ul style="list-style-type: none"> Improved beach access, parking, signage Access to mainland sites
• Viewing northern lights	67%	-	65%	Secondary	1	<ul style="list-style-type: none"> Dark-sky viewing opportunities
• Visiting small towns and villages	72%	76%	-	Primary	3	<ul style="list-style-type: none"> Revitalization Growth management, carrying capacity concerns
• Visiting well-known historic sites and buildings	73%	73%	-	Primary	1	<ul style="list-style-type: none"> Inventory of viewing sites Self-guided tours
• Interacting with the locals	-	73%	-	Secondary	3	<ul style="list-style-type: none"> Expand visitor services program beyond VCs Education and awareness of value of tourism
• Visiting world heritage sites	-	72%	-	Secondary	1	<ul style="list-style-type: none"> Support for Yuquot world heritage status

Source (EQ Interest Level Ratings): Canadian Tourism Commission, 2015, EQ Profiles Note: ^a 5=strong match 1=weak match

Framework for Discussion

The workshop will focus taking existing discussions forward with the intent of further defining and refining the strategic direction for the next 10 years. The goal will be to define game-changing projects and initiatives that will ensure the ongoing development of North Vancouver Island in a sustainable and competitive basis. The following table provides potential projects as identified in the second session.

Participants are reminded that the project list is neither exhaustive nor exclusive and that the workshop will review, refine, add/remove and prioritize as necessary. The output from the workshop will be the primary input into crafting a draft strategy.

	Game-changing projects and key priorities
INDUSTRY DEVELOPMENT	
Labour	<ul style="list-style-type: none"> • Industry-led training – working collaboratively with colleges, industry-led mentorship & professional development – building on current initiatives (Adventure Tourism educators collaboration, Aboriginal Ecotourism training) • Engaging an older demographic • Quality of life considerations
Enterprise facilitation	<ul style="list-style-type: none"> • Identifying leadership and determining roles for a support framework • Establishing business incubators • Store-front booking outlets
Community engagement	<ul style="list-style-type: none"> • Developing community / tourism business ambassadors • Role of OCP process
Tourism advocacy	<ul style="list-style-type: none"> • Developing understanding regarding the value of tourism • Communicating rural and wilderness tourism needs to policy makers • Engaging industry in wider land-use planning and policy making
Collaboration	<ul style="list-style-type: none"> • Development of new networking opportunities + relationship building / reduce fragmentation • Whale Heritage designation offers new opportunity for collaboration

	Game-changing projects and key priorities
PLANNING & POLICY	
Transportation	<ul style="list-style-type: none"> • North Island focused transportation planning – inclusive of cycling + managing logging truck traffic • Air access policy – engaging commercial airlines in the conversation • Working more effectively with BC Ferries
Crown land / access / trails	<ul style="list-style-type: none"> • Assessing ATV use / addressing issue of deactivating roads • Developing a framework for land access / consultation process (use Cumberland and Nanaimo as examples) • Backcountry stewardship policy • Review current management plans
Inter-ministry support	<ul style="list-style-type: none"> • Inter-agency management committee? Developing a more integrated planning approach • Process to clearly define role of ministries and agencies in tourism
Local Government / First Nations	<ul style="list-style-type: none"> • Building channels to facilitate greater levels of consultation and collaboration • Improve communications between local government and business • Tax incentives to encourage tourism business development
Sustainability	<ul style="list-style-type: none"> • Replicating successful planning models – e.g. Great Bear Rainforest • Updating Vancouver Island Land Use Plan • Encouraging certification programs / Whale heritage designation
INFRASTRUCTURE	
Accommodation & urban	<ul style="list-style-type: none"> • Assessing accommodation and campsite requirements
Transportation	<ul style="list-style-type: none"> • Airport/port shuttle services • Identification of highway infrastructure that is required • Electric vehicle infrastructure • Cycling infrastructure • Identification of marine infrastructure and approaches to maintenance of docks
Trails	<ul style="list-style-type: none"> • Identifying capacity issues and managing potential conflict + meeting visitor needs • Year-round maintenance • Consider development of Nimpkish Valley rail corridor • Leveraging TVI trails project

	Game-changing projects and key priorities
INFRASTRUCTURE cont.	
Signage	<ul style="list-style-type: none"> • Trails, littering, amenity signage, business signage – need for an overall assessment • Wildlife safety + information on driving gravel roads safely • Improved signage in rest areas / use of technology
Telecommunications	<ul style="list-style-type: none"> • Developing an action plan to address internet and cell coverage issues – addressing supply/demand constraints and developing a business case • Using technology to enhance the visitor experience
Maps / data	<ul style="list-style-type: none"> • Developing maps / data that is accurate and up to date – how to use existing content more effectively and increase availability
VISITOR EXPERIENCE	
General + visitor services	<ul style="list-style-type: none"> • Establishing an approach that focuses on developing a seamless delivery of the experience • Ensuring visitor services are meeting existing needs – operational hours, knowledge base etc.
Indigenous experiences	<ul style="list-style-type: none"> • Needs to be led by First Nations + need to determine what can be shared, protocols etc. • How to work through capacity issues – identify suitable tools and processes • Improve overall education of First Nations culture, history and vision to wider tourism industry
Small communities	<ul style="list-style-type: none"> • Ways of strengthening the small community experience – developing and delivering alternative ‘home-spun’ solutions / experiences – co-ops, using community kitchens, food trucks • Focus on identifying ‘cottage industry’
History & culture	<ul style="list-style-type: none"> • Developing new experiences to highlight the diversity of culture and history – e.g. Sointula • Profiling / developing Indigenous grease trails and trade routes • Identifying potential to enhance interpretation and story-telling
Wilderness experiences	<ul style="list-style-type: none"> • Scenic tour development on secondary/logging roads – to Tahsis, Sayward, Woss, Zeballos etc. • Identify parameters for responsible growth • Identify new land-based opportunities to complement the marine focus – e.g. Birding • Woss rail trail • New forms of wilderness accommodation – glamping, lodges etc. • Seamless tours – e.g. cave tours