

NORTH ISLAND

DESTINATION DEVELOPMENT STRATEGY



DESTINATION
BRITISH COLUMBIA

DESTINATION BC

Sepe Mommaerts
MANAGER, DESTINATION DEVELOPMENT

Jody Young
SENIOR PROJECT ADVISOR,
DESTINATION DEVELOPMENT

destinationdevelopment@destinationbc.ca

TOURISM VANCOUVER ISLAND

Calum Matthews
COMMUNITY & INDUSTRY SPECIALIST

250 740 1224
calum@tourismvi.ca

INDIGENOUS TOURISM BC

604 921 1070
info@indigenousbc.com

MINISTRY OF TOURISM, ARTS AND CULTURE

Amber Mattock
DIRECTOR, LEGISLATION AND
DESTINATION BC GOVERNANCE

250 356 1489
amber.mattock@gov.bc.ca



TABLE OF CONTENTS

I. EXECUTIVE SUMMARY	1	7. STRATEGY AT A GLANCE	36
II. ACRONYMS	5	8. STRATEGIC PRIORITIES.....	37
1. FOREWORD AND ACKNOWLEDGEMENTS.....	6	THEME 1: Tourism Infrastructure	
2. INTRODUCING THE STRATEGY	8	THEME 2: Trails and Crown Land Access	
a. Program Vision and Goals		THEME 3: Collaboration	
b. Purpose of the Strategy		THEME 4: Technology	
c. A Focus on the Supply and Experience		THEME 5: Industry Development	
d. Methodology		THEME 6: Product and Experience Development	
e. Project Outputs		9. IMPLEMENTATION FRAMEWORK	55
3. ALIGNMENT	13	a. Catalyst Projects	
4. SUCCESS NETWORK.....	15	b. Provincial and Regional Priorities	
5. A DISTINCTIVE DESTINATION	18	c. Funding Programs	
a. Geographic Description of the Area		10. MEASURING AND MONITORING SUCCESS.....	59
b. Description of the Population Base, Communities Included, and First Nations		APPENDIX	60
c. Description of Economy Base — Historical and Current		Appendix 1: Planning Considerations	
d. Overview of Tourism Performance		Appendix 2: Alignment Details — Plans Reviewed	
e. Key Visitor Markets		Appendix 3: International Standards for Tourism Destinations — Biosphere Destination Certification Criteria	
f. Overview of Tourism Assets, Infrastructure and Unique Selling Propositions			
g. Summary of Key Strengths, Challenges and Opportunities			
6. A DISTINCTIVE DIRECTION	27		
a. Vision			
b. Goals			
c. Guiding Principles for Destination Development			
d. Motivating Experiences			
e. Development Themes			
f. Interaction of Development Themes and Motivating Experiences			

FRONT COVER PHOTO: SAN JOSEF BAY, Shayd Johnson

(C) 2018 — Destination BC Corp. All rights reserved. No part of this guide may be reproduced in any form or by any means, electronic or mechanical, without permission in writing from Destination BC. This guide is produced to provide information to assist tourism operators in British Columbia. Destination BC does not endorse, recommend or assume any liability for any of the operations or organizations referenced in this document. **Super, Natural; Super, Natural British Columbia; HelloBC** and **Visitor Centre** and all associated logos/ trade-marks are trade-marks or Official Marks belonging to Destination BC Corp.

EXECUTIVE SUMMARY

The North Island Destination Development Strategy was developed to enhance the competitiveness of the planning area over the next 10 years and beyond.

The strategy was developed as part of Destination BC's Destination Development Program. This program is a critical part of Destination BC's corporate strategy and facilitates the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators, and other community interests to guide the long-term growth of tourism in the North Island.

In addition to supporting the underlying goals of the provincial Destination Development Program, the strategy:

- Provides strategic direction for the planning area and guidance for local and regional planning.
- Enhances the North Island's ability to leverage their resources and programs.
- Fosters joint action and inter-

community dialogue.

The strategy is intended to serve as a guide for tourism partners as they proceed with implementation and should be regarded as a working document that should be tracked on a regular basis. While tourism has two primary revenue drivers — supply and demand, destination development focuses on the supply side and what is required to create a compelling visitor experience to attract new visitors and entice repeat visitation. The strategy is one of three that has been prepared for Vancouver Island and one of 20 for the province as a whole. The situation analysis and strategy were developed over a nine-month period and based on an extensive, collaborative process.



The North Island has natural and cultural wealth marked by an intimate connection to the marine environment. Miles of untouched coastline and unspoiled waters host countless marine species, while vast rainforests support large predators such as cougars, wolves, and bears. The destination is mainly built around nature-based or outdoor adventure tourism, but also includes strong elements of Indigenous culture, history, the arts, and community lifestyles. While it benefits from a range of strengths, it is also facing a number of destination development challenges. Some of these challenges have the potential to impact the future growth and sustainability of the tourism sector such as labour market constraints, marked seasonality, and transportation issues.

The North Island planning area encompasses 41,043 km² of the Mount Waddington, Strathcona, and Comox Valley Regional Districts. The total 2016 population for the planning area is 122,233. More than 75% of the population is clustered in the Campbell River and Comox/Courtenay areas. The planning area includes 25 First Nations and four tribal councils (Kwakiutl District Council, Nuuchahnulth Tribal Council, Nanwakolas Council and Musmagw Dzawada'enuwx Tribal Council). The Nuxalk and Heiltsuk reside on the Central Coast but have traditional territory in the planning area.

THE DIRECTION

The vision for the planning area is based on the 10-year aspirations for the North Island expressed by tourism partners during the consultation process. It also aligns with existing community plans and related planning frameworks. The vision highlights the underlying elements that differentiate the area and form the basis for motivating experiences.

With this vision in place, the development focus is on six themes:

- infrastructure
- trails and Crown land access
- collaboration
- technology
- industry development
- product and experience development

These development themes contribute to the experience themes that are integral to the vision:

- marine / land eco-cultures
- Indigenous culture
- wild encounters
- island livelihoods and global connections
- bounty of land and sea

THE OBJECTIVES

In total, 47 objectives were identified for the North Island as a tourism destination for the next 10 years. These are outlined by development theme, with priority actions, an indication of priority, and relative timing for implementation.

ACTIONS

THEME 1: TOURISM INFRASTRUCTURE

1. Create a rural roads task force that will communicate and promote the value of logging roads to the visitor experience in the planning area.
2. Develop a Vancouver Island Transportation Plan, with a section on addressing the challenges of moving visitors around the North Island.
3. Improve inter-community connectivity.
4. Develop a business case for coordinating more air connections to the North Island.
5. Develop an evaluation model through which boat launches, docks, marinas, and other marine infrastructure/amenities can be listed and prioritized.
6. Prepare a Boating Development Guide to help local governments with developing infrastructure and services that will extract more value out of visiting boaters.
7. Prepare a pre-feasibility assessment of a regional pocket cruise that would operate between Vancouver and/or Seattle and the North Island.
8. Develop a BC Ferries communications and advocacy strategy.
9. Advocate for more user-friendly and accessible cycling destinations on the North Island.
10. Develop a signage strategy that is more responsive to visitor needs and provides consistency across jurisdictions.
11. Support local governments' housing initiatives that address worker and visitor housing and accommodation options.
12. Improve cellular, broadband, and wi-fi services within the North Island.

THEME 2: TRAILS AND CROWN LAND ACCESS

13. Encourage ATV services and guided experiences, and build on the expanding trail network in the Strathcona region.
14. Identify exceptional trails on the north coast to complement and enhance TVI's Hiking Master Plan.
15. Encourage BC Parks to undertake new management plans for select parks in the planning area that incorporate a much higher profile tourism mandate and management direction.
16. Examine the feasibility of a BC Parks Interpretive Visitor Centre on the North Island.
17. Update the Vancouver Island Land Use Plan and improve its relevance to tourism.
18. Develop a consistent trail sustainability program that maintains the current quality of experience while diverting use to under-utilized trails.
19. Promote a consistent, cohesive, and acknowledged backcountry stewardship policy.
20. Catalogue, curate, and promote interpretive resources linked to the trail systems to stimulate visitor interest and awareness of local culture.
21. Build a better baseline that will assist future development of a marine trail product on the North Island.

ACTIONS

THEME 3: COLLABORATION

22. Create a mechanism to implement, monitor, and follow up on the Destination Development Strategy.
23. Prepare a Value of Tourism study for the North Island.
24. Encourage all ministries and Crown corporations that have the potential to influence tourism, to state their role in tourism as an economic development priority.
25. Closely review the implementation of the North Vancouver Island Marine Plan and work through the partnership to protect the integrity of marine and near-shore cultural and heritage resources.
26. Promote greater collaboration among local governments on tourism planning.
27. Create a tourism ambassador program to provide more memorable experiences for visitors to the North Island.
28. Strengthen the emphasis on sustainability within the tourism sector.

THEME 4: TECHNOLOGY

29. Further develop, enhance, and expand the Vancouver Island North trails map and app.
30. Develop a tourism technology strategy for Vancouver Island that would prioritize development efforts.
31. Develop a performance measurement framework that can be used to evaluate the Destination Development Strategy and help communities track progress on tourism.

THEME 5: INDUSTRY DEVELOPMENT

32. Enhance enterprise facilitation services by local governments and economic development agencies.
33. Promote increased tourism capacity amongst educational institutions.
34. Formulate legacy services to enhance the Remarkable Experiences program.
35. Support expansion of training programs and tourism career planning for Indigenous peoples.
36. Work with industry to expand delivery and increase uptake of tourism training programs.
37. Investigate the feasibility of a tourism mentorship program on the North Island.
38. Promote the adoption of certification standards for tourism employees.

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT

39. Organize a study tour of best practice tourism destinations for local governments, DMOs, and industry leaders.
40. Continue to evaluate and position visitor services so they are able to promote and facilitate connections to North Island experiences and communities.
41. Develop new winter experiences to increase visitation in the off and shoulder seasons.
42. Encourage more excursions and day tours so visitors have more activity choices when travelling through the planning area.
43. Develop more experiences linked to the pending accreditation of the world's first Whale Heritage Site on Vancouver Island North.
44. Work with First Nations and ITBC to encourage more Indigenous experiences.
45. Increase the touring appeal of rural and island communities, which target EQ segments that have a high interest level in visiting, providing enhanced services.
46. Increase outdoor adventure experiences.
47. Increase arts and cultural heritage experiences.

II. ACRONYMS

AEST Ministry of Advanced Education, Skills & Training

AGRI Ministry of Agriculture

CITZ Ministry of Citizens' Services

DMO Destination Marketing Organization

DBC Destination British Columbia

DC Destination Canada

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

go2HR The British Columbia Human Resource Organization for Tourism

ITAC Indigenous Tourism Association of Canada

ICET Island Coastal Economic Trust

JTT Ministry of Jobs, Trade & Technology

ITBC Indigenous Tourism British Columbia

IRR Ministry of Indigenous Relations and Reconciliation

LBR Ministry of Labour

MAH Ministry of Municipal Affairs and Housing

MAPP Marine Plan Partnership

MRDT Municipal and Regional District Tax (commonly referred to as the 'Hotel Tax')

RSTBC Recreation Sites and Trails British Columbia

RDMO Regional Destination Management Organization

TAC Ministry of Tourism, Arts and Culture

TIABC Tourism Industry Association of British Columbia

TRAN Ministry of Transportation and Infrastructure

TVI Tourism Vancouver Island

VIEA Vancouver Island Economic Alliance

WD Western Diversification

WFP Western Forestry Products

WTA Wilderness Tourism Association

1

FOREWORD AND ACKNOWLEDGEMENTS

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

As one of 20 destination development strategies that will be produced in the province, the North Island strategy will contribute to the tapestry of long-term regional and provincial planning that will

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

ACKNOWLEDGEMENTS

Destination British Columbia, Tourism Vancouver Island (TVI), and the project facilitation team thank the stakeholders who contributed throughout the process by attending the community meetings, participating in surveys, stakeholder interviews and follow-up conversations, and forwarding relevant documents that provided the background information for the situation analysis. The participation of our partners throughout the process was invaluable, but it is important to note that no endorsement of this strategy or any action listed within was obtained.

We give thanks and acknowledge the Kwakwaka'wakw, Nuu-chah-nulth, and Coast Salish people on whose traditional territories we gathered for meetings in Port Hardy, Port McNeill, Sayward, Campbell River, and Courtenay.

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

Special thanks are offered to members of the working committee:

- Steve Emery, Owner & Committee Member, North Island Kayak, Sayward Tourism Committee
- Erin Neely, Business Development, Pacific Coastal Airlines
- David Pinel, Operator & Instructor, West Coast Expeditions and North Island College
- Janet Hoare, Tourism Committee Member, Sayward Valley Tourism
- Kirsten Soder, Executive Director, Destination Campbell River
- Joli White, Tourism Coordinator, Vancouver Island North Tourism
- Conrad Browne, CEO, Kwakiutl Economic Development Corporation
- Lillian Hunt, Director & Operator, Alert Bay Tours, ITBC Director, TVI Director
- Leah Knutson, Manager of Recreation, Village of Cumberland
- Aaron Miller, Section Head, BC Parks
- Ben Clark, Policy Analyst, Ministry of Tourism, Arts and Culture

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

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

A photograph of four glasses of beer in different colors (light yellow, dark red, golden, and dark) sitting on a wooden tray. The tray has the letters B, R, P, and S written on it. The background is a wooden bar surface.

2

INTRODUCING THE STRATEGY

CAMPBELL RIVER
Photo: Ben Giesbrecht

The North Island Destination Development Strategy has been developed to enhance the competitiveness of the planning area over the next 10 years and beyond. The strategy was developed as part of Destination BC's Destination Development Program. The program is a critical part of Destination BC's corporate strategy and facilitates the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators, and other community interests to guide the long-term growth of tourism in the North Island.



A. PROGRAM VISION AND GOALS

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

BC IS A WORLD-CLASS TOURISM DESTINATION THAT OFFERS REMARKABLE PRODUCTS AND EXPERIENCES THAT ARE AUTHENTIC, DRIVEN BY VISITOR DEMAND, EXCEED EXPECTATIONS, AND ALIGN WITH BC'S BRAND.

The above vision is supported by three provincial goals:

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

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

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

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

FIGURE 1:
Tourism Revenue
Drivers



B. PURPOSE OF THE STRATEGY

The purpose of this strategy is to support the goals of the provincial Destination Development Program and:

- Provide strategic direction for the planning area and guidance for local and regional planning.
- Enhance the North Island's ability to leverage their resources and programs.
- Foster joint action and inter-community dialogue.

The North Island Destination Development Strategy is intended to serve as a guide for tourism partners as they proceed with implementation. This document should be reviewed and updated as necessary to reflect changing tourism objectives, priorities, and market conditions. In addition, results should be tracked regularly to ensure learnings help future implementation activities be even more effective in increasing economic, social, and cultural benefits to the entire North Island planning area.

C. A FOCUS ON THE SUPPLY AND EXPERIENCE

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

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

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

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

- the setting in which our experiences take place and how to access them
- policies that establish and maintain opportunities and growth barriers
- the investment enhancement framework
- products and experiences matched to consumer interests, including infrastructure and amenities (which are often public in nature and used by residents as well as visitors)
- visitor servicing programs that meet and exceed guest expectations
- capability, skills, and training our industry

These dimensions are illustrated below (Figure 2).

D. METHODOLOGY

The North Island Destination Development Strategy was developed based on an extensive, collaborative effort during a nine-month process that culminated in the creation of a situation analysis report and this strategy.

The destination development planning approach was highly iterative, allowing for multiple opportunities for stakeholder input and validation (Figure 3). The process, created by Destination BC, followed a semi-structured yet flexible approach that ensured the distinct considerations of the North Island planning area were assessed and respected. A volunteer Working Committee contributed their expertise to reviewing and discussing the key findings from the situation analysis and helped develop the goals, supporting objectives, and strategies contained in this strategy.

FIGURE 2:
Five Dimensions
of Supply — the
Visitor Experience



FIGURE 3:
Key Project
Timelines

ACTIVITY	DATES
Project staging and document review	May, 2017
First in-community consultation at two locations: • Courtenay • Port Hardy Destination audit	May, 2017
Second in-community consultation at three locations: • Campbell River • Port McNeill • Comox Interviews and industry survey	November– December, 2017
Draft Situation Analysis	September– December, 2017
Priority setting and review of preliminary findings with the Working Committee • Workshop in Sayward • Interviews with stakeholders	December– January, 2018
• Draft Destination Development Strategy • Review of the Draft Strategy and Draft Situation Analysis by the Working Committee • Follow-up teleconference session with the Working Committee to discuss/refine strategies • Additional interviews with select stakeholders	January– February, 2018
Finalization of the Situation Analysis and the Destination Development Strategy	March 2018

E. PROJECT OUTPUTS

The three key outputs from this project include:

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

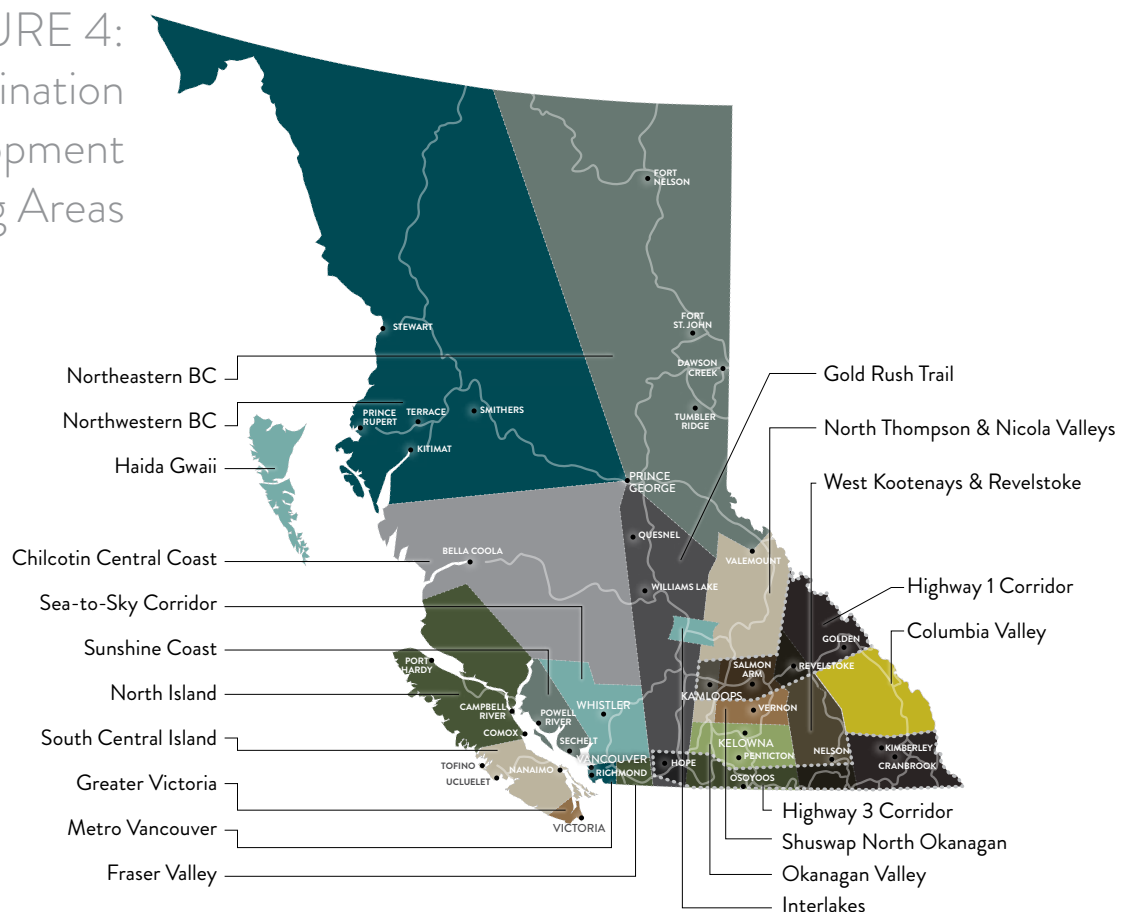
3

ALIGNMENT

CAPE SCOTT PROVINCIAL PARK
Photo: Shayd Johnson

The North Island Destination Development Strategy is one of three that has been prepared for Vancouver Island, and one of 20 for the province as a whole (Figure 4).

FIGURE 4:
Twenty Destination
Development
Planning Areas



The two other planning areas within the Vancouver Island region are:

South Central Island and Greater Victoria. Over the course of Destination BC's Destination Development Planning Program, each of the province's six tourism regions will integrate their planning area strategies into one Regional Destination Development Strategy which, in turn, will be used to inform a Provincial Destination Development Strategy.

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

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

FIGURE 5:
Levels of Destination
Development Planning





SUCCESS NETWORK

STRATHCONA PARK
Photo: Boomer Jerritt

Successful destination development implementation recognizes that we all have a role to play. The North Island Destination Development Strategy is not intended to work in isolation or disregard the existing policy and planning framework that already exists. Rather, this planning process brought tourism to the table in a coordinated fashion to work within the context of wider policies and planning efforts.

Success networks represent the clusters of businesses and organizations who are encouraged to collaborate and work in harmony to bring the opportunity to fruition, and implement the strategy. As such, these strategies have been built on a foundation of utilizing federal, provincial, regional and local organizations, and available resources for implementation. It is only through working collaboratively in the continued planning and

implementation of destination development that the true potential of the North Island be realized.

Tourism partners throughout the development of this strategy have articulated their desire to work cooperatively on key aspects of implementation.

The following partners have been identified collectively through the strategy development process as likely playing a role in moving a potential objective or action forward:

FIGURE 6: Key Governmental and Management Organizations

FEDERAL	FIRST NATIONS	PROVINCIAL	REGIONAL	LOCAL
<ul style="list-style-type: none"> • Destination Canada • Indigenous Tourism Association of Canada • Western Economic Diversification • Parks Canada • Canadian Heritage • Public Works and Government Services Canada 	<ul style="list-style-type: none"> • Kwakiutl District Council • Nuu-chah-nulth Tribal Council • Nanwakolas Council • Musgmagw Dzawada'enuwx Tribal Council 	<ul style="list-style-type: none"> • Destination BC (DBC) • Indigenous Tourism BC • Ministries/Agencies: <ul style="list-style-type: none"> -Tourism, Arts and Culture -Indigenous Relations and Reconciliation -Transportation and Infrastructure -Forests, Lands, Natural Resource Operations and Rural Development -Operations, incl. Rec Sites and Trails & Heritage -Environment -BC Parks -Agriculture • go2HR 	<ul style="list-style-type: none"> • Tourism Vancouver Island • Vancouver Island North Tourism • Island Coastal Economic Trust • Vancouver Island Economic Alliance • Community Futures of Mount Waddington, Strathcona, Alberni Clayoquot • North Island College • Strathcona Wilderness Institute • Vancouver Island Spine Trail Association 	<ul style="list-style-type: none"> • Regional Districts of Mount Waddington, Strathcona, Comox Valley • Municipalities of Port Hardy, Port McNeill, Alert Bay, Port Alice, Sayward, Zeballos, Tahsis, Gold River, Campbell River, Comox, Courtenay, Cumberland • Discovery Island Chamber of Commerce • Port Hardy Chamber of Commerce • Hornby Island Chamber of Commerce • Tourism Campbell River • Comox Valley Economic Development Society



THIS STRATEGY IS INTENDED TO INFORM ACTIONS FOR THE FUTURE, WHICH OVER TIME MAY BE EMBEDDED IN THE LOCAL, REGIONAL, AND PROVINCIAL DECISION MAKING.

The result will be an integrated system of priorities that will achieve better development decisions, drive greater tourism revenues, and realize benefits for businesses and communities on the North Island. All of this will contribute to a thriving, vibrant, and growing economy.

Joint strategy ownership among all planning area tourism partners is a critical component of this program's success. The planning process identifies a suggested success network of tourism partners to champion and move actions within each objective forward. However, during implementation, leads and involved parties would need to be verified. In many instances, executing on an initiative may require sharing responsibilities, and entities listed will be responsible to lead their own areas.

The regional representatives for Vancouver Island will have an important role to play in championing regional destination development. As this planning process is not intended to duplicate ongoing efforts or create new organizational or administrative structures, the implementation of this strategy should first be executed through existing organizations, where possible.



5

A DISTINCTIVE DESTINATION

TRADITIONAL SALMON BAKE, SPRING ISLAND
Photo: Mason Mashon

OVERVIEW OF NORTH ISLAND

A. GEOGRAPHIC DESCRIPTION OF THE AREA

The North Island planning area encompasses 41,043 km² of the Mount Waddington, Strathcona, and Comox Valley Regional Districts. The total 2016 population was 122,233, with more than 75% of people clustered in the Campbell River and Comox/Courtenay areas.

The Comox Valley Regional District covers an area of 2,425 square kilometres, and serves a population of 66,527 according to the 2016 Census. Major communities include Courtenay, Comox, and Cumberland. The regional district borders extend east to Denman and Hornby Islands.

The Strathcona Regional District has a land area of 18,330 km² and a 2016 census population of 44,671. Major communities include Campbell River, Sayward, Gold River, Tahsis, and Zeballos. Its electoral areas include Area A (Kyuquot/Nootka-Sayward), Area B (Cortes Island), Area C (Discovery Islands-Mainland Inlets), and Area D (Oyster Bay-Buttle Lake).



NORTH ISLAND

● Towns and Indigenous Communities

— Highways

— Lakes and Rivers

— Provincial Parks and Protected Areas

1. Cape Scott Park
2. Broughton Archipelago Marine Park
3. Lower Tsitika River Park
4. Nimpkish Lake Park
5. Brooks Peninsula Park (Muqgiwn)
6. Checleset Bay Ecological Reserve
7. Tahsish Kwois Park
8. Woss Lake Park
9. Schoen Lake Park
10. Hesquiat Peninsula Park
11. Strathcona Park



DESTINATION
BRITISH COLUMBIA™

0 50 100
Km

The Regional District of Mount Waddington has a land area of 20,288 km² and a 2016 population of 11,035. Major communities include Port McNeill, Port Hardy, Port Alice, and Alert Bay. The regional district takes in the adjoining lower Central Coast region centered on the Queen Charlotte Strait, but there are no incorporated communities on the mainland.

THE PLANNING AREA IS A GATEWAY TO COASTAL BC, AS WELL AS A POPULAR DESTINATION IN ITS OWN RIGHT. PORT HARDY IS A MAJOR TRANSIT POINT, GATEWAY, AND STAGING AREA FOR THE CENTRAL AND NORTH COASTS OF BRITISH COLUMBIA, ACCESSED VIA THE BC FERRIES INSIDE PASSAGE AND DISCOVERY COAST CONNECTOR ROUTES.

BC Ferries maintain eight routes on the North Island, the major one being the Inside Passage, from Port Hardy to Prince Rupert. Others include Georgia Strait North (Comox-Powell River),

Baynes Sound (Buckley Bay-Denman), Lambert Channel (Denman-Hornby), Discovery Passage (Campbell River-Quadra), Sutil Channel (Quadra-Cortes), Broughton Strait (Port McNeill-Alert Bay), and Discovery Coast Connector (Port Hardy-Central Coast).

There are 62 airports, aerodromes, and helipads/ports in the planning area, including those operated by the Coast Guard, health authorities and National Defence. Scheduled air flights are available at the Comox, Campbell River, and Port Hardy airports. Airport shuttle services, taxis, and car rental agencies are available as well.

BC Transit offers local bus services in all municipalities across the planning area except those on the west coast.

The North Island has four key corridors. The original Island Highway (19A) follows much of the eastern coastline between Port Hardy and Nanaimo. At Campbell River, it intersects the Inland Island Highway (19). The majority of traffic across the planning area is on Route 19. Two east-west highways provide access to the west coast, Route 28 from Campbell River to Gold River, and Route 30 to Port Alice via Route 19.

Coastal communities are served by 32 ports, with the majority managed by local authorities, and a small number operated by the Department of Fisheries and Oceans.

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

The planning area includes communities from the Comox Valley Regional District, Strathcona Regional District, and the Mount Waddington Regional District. Municipalities include: Comox, Courtenay, Cumberland, Campbell River, Gold River, Tahsis, Gold River, Sayward, Zeballos, Alert Bay, Port Alice, Port Hardy, and Port McNeill.

THE POPULATION OF THE PLANNING AREA WAS 122,161 IN 2016, WITH POPULATION GROWTH AVERAGING 1.7% BETWEEN 2011 AND 2016. SMALLER REMOTE COMMUNITIES HAVE BEEN LOSING POPULATION OVER THE LAST DECADE.

There are 25 First Nations and four tribal councils (Kwakiutl District Council, Nuuchahnulth Tribal Council, Nanwakolas Council, and Musgumagw Dzawada'enuwx Tribal Council) in the planning area, with an estimated 2016 population of 16,076. The Nuxalk and Heiltsuk reside on the Central Coast but have traditional territory in the planning area.



C. DESCRIPTION OF ECONOMY BASE — HISTORICAL AND CURRENT

The economic base of the planning area is dominated by forestry and the public service, but there is considerable variation among sub-regions and individual communities. Campbell River and Port Hardy have the highest reliance on forestry for total community income, with the Alert Bay area and the Comox Valley much less reliant. The Comox Valley has easily the most diversified economy, with agriculture, mining, construction, and transportation all accounting for equal portions, together with the growing significance of education, health services, aerospace industries, and aquaculture. Comox is the home base of CFB 19 Wing Comox, which is the largest economic generator in the immediate area. Manufacturing other than forest products, high technology, and agri-food production is also more widespread in the Strathcona and Comox Valley regional districts than in Mount Waddington. The public sector and non-employment sources of income are very important to the regional economy, accounting for close to half of all income. The primary industries are significant to the Mount Waddington economy, with this area being one of the most important timber production areas in Canada, and the location of one of the few specialty cellulose mills (sulphite pulp) on the continent. It is also home to approximately half the farmed salmon production on the BC Pacific Coast. Tourism accounts for between 5% and 7% of the economic base, with Campbell River and the Comox Valley on the higher end and Mount Waddington on the lower¹.

¹Horne, Garry. 2009. British Columbia Local Area Dependencies-2006. BC Stats.



D. OVERVIEW OF TOURISM PERFORMANCE

- There are few indicators available to measure the performance of the tourism industry as a whole for the entire planning area. The data that exists includes room revenue, visitor centre statistics, air passengers, BC ferry traffic, highway volumes, and parks attendance.
- Year over year MRDT revenues declined between 2010 and 2012, but grew strong through to 2015 when close to \$42 million was earned². The growth in revenue was partially attributable to an increasing inventory of properties; 75 in 2015 versus 57 in 2010. Average per property revenues also rose from approximately \$300,000 in 2010 to \$555,000 in 2015.
- Visitor Centre attendance has declined 20% since 2012, with Alert Bay the only Visitor Centre reporting an increase (46%). The other five Visitor Centres all saw a drop-off in attendance, although Comox was down only marginally. The disruption of ferry service to the Central Coast is believed to be partially to blame for this. Attendance is heavily weighted to the summer months, with 56% occurring in the peak July to September period and 68% when June is included.
- Air passenger traffic in Comox and Campbell River for the summer of 2016 saw a 20% increase in both airports compared to their summer 2011 equivalents³. Looking only at 2016 over the previous year, Campbell River declined by 3%, reflecting a local slowdown in construction and other economic activity that had driven rapid growth over the last few years, while Comox airport passenger numbers grew by 5%⁴.
- All eight Northern Island BC Ferries routes generated overall lower volumes in 2016 when compared to 2009. Total passenger volumes during this period were down 4.5%, from 5.9 million to 5.6 million. The greatest percentage decrease was on the Powell River to Comox Route (8.3%). It is believed the decline in passenger volumes since the 2008 recession is partly attributable to increased prices and service cuts on many routes. A general uptrend in volumes since 2014 coincides with temporary fare discounts and an increase in international visitors.
- Aggregate highway traffic volumes for the three permanent count stations in the North Island has risen 1.7% annually between 2007 and 2016, while summer average daily traffic was in the same range. However, growth has been concentrated on the southern routes around Comox, Courtenay, and Campbell River.
- There are 51 provincial parks in the North Island planning area, many of which do not track attendance because there are no campgrounds or visitor amenities. For the 2013 to 2015 period, average annual attendance was 684,143, a growth of 35% over the average of 507,880 in the 2006 to 2008 period. In comparison, attendance growth for all of Vancouver Island and BC were 5% and 8%, respectively.

²MRDT data is aggregated for Central and North Island by BC Stats — this aggregation includes the communities of Alert Bay, Courtenay, Port Alice, Mount Washington, Nanaimo, Port Alberni, Port Hardy, Port McNeill and Qualicum.

³Island Coastal Economic Trust, Air Passengers (Updated December 2016).

⁴Destination BC, May 2017, Vancouver Island Regional Profile.

E. KEY VISITOR MARKETS

Recent research⁵ conducted by both Tourism Campbell River and Region (CRR) and Vancouver Island North (VIN) during the summer of 2015 has produced valuable insights into the planning area's visitors. While the two regions are destinations for a significant proportion of their visitors, as much as one-third of visitors are en-route to another destination. The data also shows that nature-based activities and cultural heritage attractions are important to the visitor experience.

This visitor profile reflects and reinforces the Vancouver Island visitor profile which shows that beaches, parks, hiking and backpacking, boating, and wildlife viewing are all popular activities. However, US visitors tend to prefer historical and cultural sites more than either Canadian or other international visitors⁶. The top five markets were BC residents, Washington State, Alberta, Australia, and Ontario. Visitor Centre data, while not necessarily representative, does show a divergence from the Vancouver Island profile. In 2015–2016 aggregate

Visitor Centre attendance for the North Island indicated 43% were from BC, followed by Europeans at 23%, US at 14%, and rest of Canada at 8%.

Many of the existing experiences align well with the activities that motivate travel with the three Explorer Quotient market segments that Destination BC targets — Authentic Experiencers, Cultural Explorers, and to a lesser extent, Free Spirits. For these markets the natural landscape of mountains, coastline, forests, and wildlife create a competitive advantage in the Canadian context, as do the waterfront resorts within the planning area. The latter include both front and backcountry facilities. While there are no national parks on North Island, there are several provincial parks with outstanding scenery and wildlife viewing opportunities — another demand generator for these EQ markets. Heritage and cultural experiences have great potential but are under-utilized. It should be noted that many elements of Indigenous culture in the planning area are globally significant.

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

The North Island is a planning area of natural and cultural wealth marked by an intimate connection to the marine environment. Miles of untouched coastline and unspoiled waters host countless marine species, while vast rainforests support large predators such as cougars, wolves, and bears.

This abundance is spread across front, mid and backcountry areas, with the latter characterizing the extensive mainland portion of the planning area.

The land-based and marine-based ecotourism and adventure tourism assets and experiences include: a range of outstanding provincially protected areas of beaches, an array of landscapes and ecosystems, over 260 recreation sites, wide ranging

opportunities for iconic wildlife viewing and nature observation, the largest concentration of caves in North America, globally recognized scuba-diving opportunities, outstanding kayak and canoeing settings, internationally famed sport fishing experiences, marine cruising, mountain biking and road cycling, alpine and Nordic skiing, championship golf courses, and well-recognized garden collections.

⁵Tourism Campbell River & Region, December 2015, Visitor Profile — Summer 2015; Vancouver Island North, November 2015, Visitor Profile — Summer 2015

⁶Destination BC, May 2017, Vancouver Island Regional Tourism Profile.



While the planning area is predominantly built around nature-based or outdoor adventure tourism, it has strong elements of Indigenous culture, history, the arts, and community lifestyles. Indigenous occupation and culture can be traced back millennia. The traditional big houses, totem poles, and other living culture are still much in evidence. European settlement, dating to the 1800s, is the foundation of many settled communities, former fishing villages and farmland.

The planning area includes the traditional home of the Kwakwaka'wakw (East Coast of Vancouver Island and mainland) and the Nuuchahnulth (West Coast of Vancouver Island). Namgis/Alert Bay is the location of the U'mista Cultural Centre, Canada's longest running First Nations museum and cultural centre, founded in 1980 as a ground-breaking project to house potlatch artifacts. On Quadra Island, the Kwagiulth Museum and Cultural Centre on Cape Mudge (Wewaikei) houses items that were confiscated by the federal government in the early 1900's in their attempt to suppress Indigenous culture. The Tsa-Kwa-Luten Lodge beyond Cape Mudge is a large wood and glass longhouse which provides further exposition of the Kwakwaka'wakw culture, and the planning area offers a variety of Indigenous tours and galleries.

The heritage of European settlers and contemporary culture can also be explored in a number of other locations, from the Whale Interpretive Centre in Telegraph Cove and the Comox Air Force Museum, to a range of community museums, galleries, craft shops, and heritage trails. The number of artists and artisans has grown and there is now a

network of studios and art galleries in virtually every community. There are performing arts at the Sid Williams Theatre in Courtenay and the Tidemark Theatre in Campbell River. Over 100 annual events and festivals are hosted within the planning area, with various cultural, nature, harvest, and arts themes all contributing to the arts heritage of North Island. The increasingly popular Vancouver Island MusicFest in Courtenay features roots and world music, while some of Canada's top artisans gather annually at the Filberg Festival in Comox, which has the largest juried art show in Western Canada. Campbell River Salmon Fest offers logger sport competitions while the Summer Salmon Sizzler is two days of salmon cooking competitions with live music, beer and oyster tasting. The BC Seafood Festival in Comox has become the largest seafood festival in Western Canada. With festivals of this nature, a growing number of farmers' markets, and new emerging product such as the Comox Valley Farm Cycle Tour, the focus on local foods is growing and the significance of this as part of the visitor experience is increasing.

The planning area has two distinct sub-regions. While they both share the overarching landscape of mountains, forests, and a captivating coastal environment, the Comox-Strathcona region is the more urban of the two, with major communities and service centres in Campbell River and the Comox Valley. The northern sub-region of Mount Waddington has small, rural communities linked by the Island Highway and coastal waterways with access to a remote but accessible natural environment of equal parts water and land.

The area is accessible by highway from south central Vancouver Island, ferry (car and walk-on service), airplane, floatplane, and by motor-coach. BC Ferries maintains eight routes, and there are 32 ports, and 62 airports, aerodromes, and helipads/ports. Scheduled air flights are available at the Comox, Campbell

River, and Port Hardy airports. Airport shuttle services, taxis and car rental agencies are available. The four highway corridors include the original Island Highway (19A), the Inland Island Highway (19), Route 28 from Campbell River to Gold River, and Route 30 to Port Alice via Route 19.

G. SUMMARY OF KEY STRENGTHS, CHALLENGES AND OPPORTUNITIES

From a tourism destination perspective, the North Island planning area benefits from a range of strengths. However, it is also facing a number of destination development challenges, some of which have the potential to impact the future growth and sustainability of the tourism sector. To build on these

strengths and address these challenges, the area’s tourism stakeholders have identified a range of opportunities. These opportunities form the foundation of the North Island Destination Development Strategy. The key strengths, challenges, and opportunities are summarized below in no particular order.

FIGURE 7: Strengths, Challenges, and Opportunities

KEY STRENGTHS	KEY CHALLENGES	KEY OPPORTUNITIES
<ul style="list-style-type: none">• Natural, wild landscapes• Provincial parks• Alpine areas• Karst/caves• Islands and inlets• Trails• Wildlife, marine/ terrestrial• Yuquot/Friendly Cove• Inside Passage• Great Bear Rainforest• Authentic Indigenous experiences• Remote, iconic lodges• Sport fishing• Regional service centres	<ul style="list-style-type: none">• Regional, industry cooperation• Land management• Housing• Labour market issues• Carrying capacity• Awareness of tourism• Highway conditions• Seasonality• Interpretive signage• Transportation and transit services• Marine and ferry infrastructure• High business costs• Export-ready product	<ul style="list-style-type: none">• Community buy-in, commitment to tourism• Cooperative planning• Build a hospitality culture• Sustainability principles• Experiences that show “our DNA”• Indigenous experiences• Higher-end, higher-yield products• Interpreting authenticity• Marine services• Wildlife interpretation• Showcase small communities• Labour market partnerships



A DISTINCTIVE DIRECTION

NORTH VANCOUVER ISLAND
Photo: Steven Fines

THE DIRECTION FOR THE STRATEGY

A. VISION

The following 10-year vision has been created, based on the 10-year aspirations for the North Island expressed by tourism partners during the consultation process, while also seeking to align with existing community plans and related planning frameworks. The goals, strategies, and actions within this plan have been prioritized to achieve the elements identified within this vision.

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



THE NORTH 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 GOVERNMENT TO ENSURE THAT THE PLANNING AREA'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.

B. GOALS

Three inter-related destination development goals have been identified to support the vision for North Island:

1. Develop distinctive experiences with a high level of market appeal
2. Build a year-round visitor economy
3. Disperse the benefits of tourism throughout the North Island

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

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

C. GUIDING PRINCIPLES FOR DESTINATION DEVELOPMENT

AS THE JOURNEY OF DESTINATION DEVELOPMENT CONTINUES IN THE NORTH ISLAND PLANNING AREA, CHOICES WILL HAVE TO BE MADE AND PRIORITIES SET.

Guiding principles were discussed by stakeholders, and it was agreed that the Destination Development Strategy and related decision-making:

- Supports and enhances existing community values and aspirations
- Builds on core attributes that make the destination distinctive
- Recognizes 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



D. MOTIVATING EXPERIENCES

An identification of the key motivating experiences that will set the destination apart as a competitive and sustainable destination, and will entice the visitors we want to visit, is an important step in developing the strategy. Differentiating the North Island and making it truly distinct in terms of these experiences will increase the strength of the planning area.

The first step in identifying the experience potential for the planning area involves developing an understanding of the key attributes and personality of the North Island. The following figure depicts the key attributes and experience themes, and the words and phrases that capture the essence of the North Island (as perceived by the stakeholders involved in the planning process).

Visitor experiences that encapsulate this personality, and focus on leveraging these attributes and the underlying five experience themes, are going to strengthen the distinctiveness of the North Island and its overall positioning in the marketplace. A key focus of this

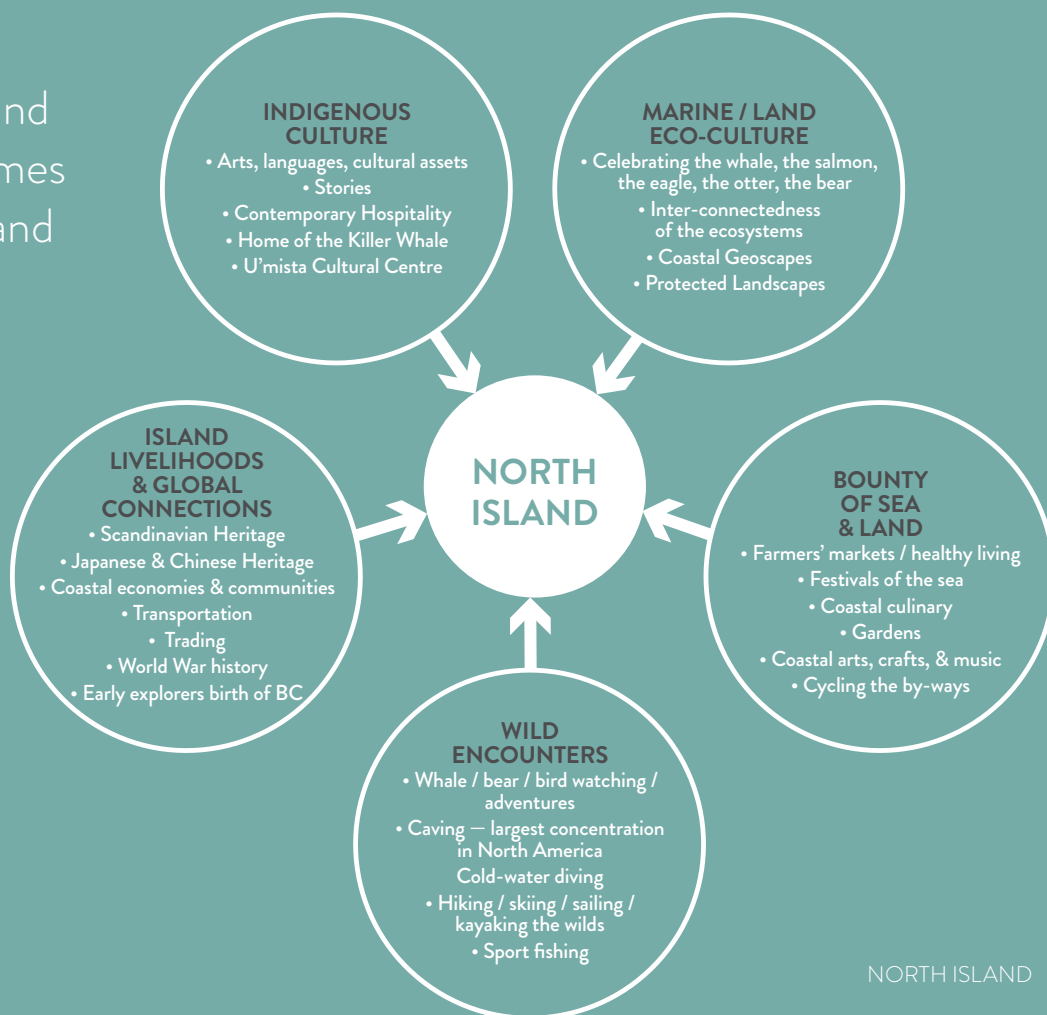
strategy is to work together to ensure there is a collective mass of activities for each of these experience themes to motivate travel to the North Island as a destination.

Throughout the strategy development, discussions were guided by keeping the desired consumer in mind, predominantly the Authentic Experiencer and the Cultural Explorer from near-in regional markets and overseas — particularly Europe.

Further information is provided to highlight potential opportunities for each experience theme.

AUTHENTIC
 BOUNTIFUL
 TRUST
 Composite Experience
 Inspiring
 Relaxing
 Wild
 balanced
 Islands & Inlets
 gritty
 friendly
 Accessible & Remote
 Small-scale human-scapes
 Space to Breathe
 RESPONSIBLE
 RESPONSIBLE
 ENERGIING
 spiritual
 PASSION

Figure 8:
Key Attributes and
Experience Themes
of the North Island



EXPERIENCE THEME OVERVIEW

MARINE / LAND ECOCULTURE

The interplay between land and sea, the diverse coastline of beaches, inlets, and islands, the backdrop of forested mountain peaks, the abundance of terrestrial and marine-based wildlife, and the dynamics of the inter-relationship between the land and the marine environment provide the basis for the identity of the North Island. Everything else — Indigenous culture, settler economies, the wild encounters, and even visitor sentiment for the area are all shaped by, and reflect, the distinctive nature of this interplay. Visitor experiences need to provide the opportunity to explore the diversity, the grandeur, the raw beauty, the challenges, and the elemental forces that are present in this area of land and ocean.

INDIGENOUS CULTURE

The Indigenous culture in North Island dates back millennia, and First Nations people have shared this wild coastal region with eagles, black bears, orca, and salmon for over 8,000 years. After a long period of cultural repression, the Indigenous communities are once again celebrating their culture through art, dance, music, language, and a sustainable day-to-day relationship with the natural world. As First Nation Councils within the planning area see the opportunity to engage in tourism as an economic sector, existing experiences have been strengthened, and new experiences and guided activities have been developed — such as those offered by k'awat'si Tours. New resort and accommodation product and partnerships to open up trail-based activities are increasing the appeal of the North Island. This niche sector has become a critical element of the destination offering.

WILD ENCOUNTERS

The North Island is renowned for its marine and land-based adventure and for the opportunities to view wildlife year-round. Whether it is hiking iconic trails, exploring some of the longest and deepest karst caves in Canada, diving in waters described as a marine wonderland, biking routes varying from forest roads and downhill trails to back roads and byways, camping and enjoying the beaches, sport fishing in some of the richest fishing grounds around the island, the Kusam Klimb challenge, or enjoying a range of winter skiing adventures — the North Island has a remarkable spectrum of wild encounters.

ISLAND LIVELIHOODS AND GLOBAL CONNECTIONS

For almost 240 years the North Island has featured on the world stage, with a history that has included standing on the brink of war as the British and the Spanish each sought to assert navigation claims which ultimately resulted in the Nootka Convention; and the early exploration of the area by European explorers, with Captain Cook being the first to arrive followed by Spanish explorers in the late 1700's. Early exploration then led to waves of settlement, with the arrival of settlers from Scandinavia and early attempts to farm the coastal areas; the establishment of a utopian society by the Finnish settlers on Malcolm Island, the arrival of Chinese labourers to build early dock infrastructure on the west coast, followed later by Japanese settlers who sought to make a living from logging, fishing, farming, and whaling industries. The history of these industries through to present day, and the emergence of new industries such as the aerospace sector, demonstrates how the North Island continues to exhibit strong global connections in all areas of its livelihoods. Moving forward, the emphasis will be on developing new experiences that will bring these older and partially hidden stories to life so they add value to a visit on the North Island.

BOUNTY OF LAND AND SEA

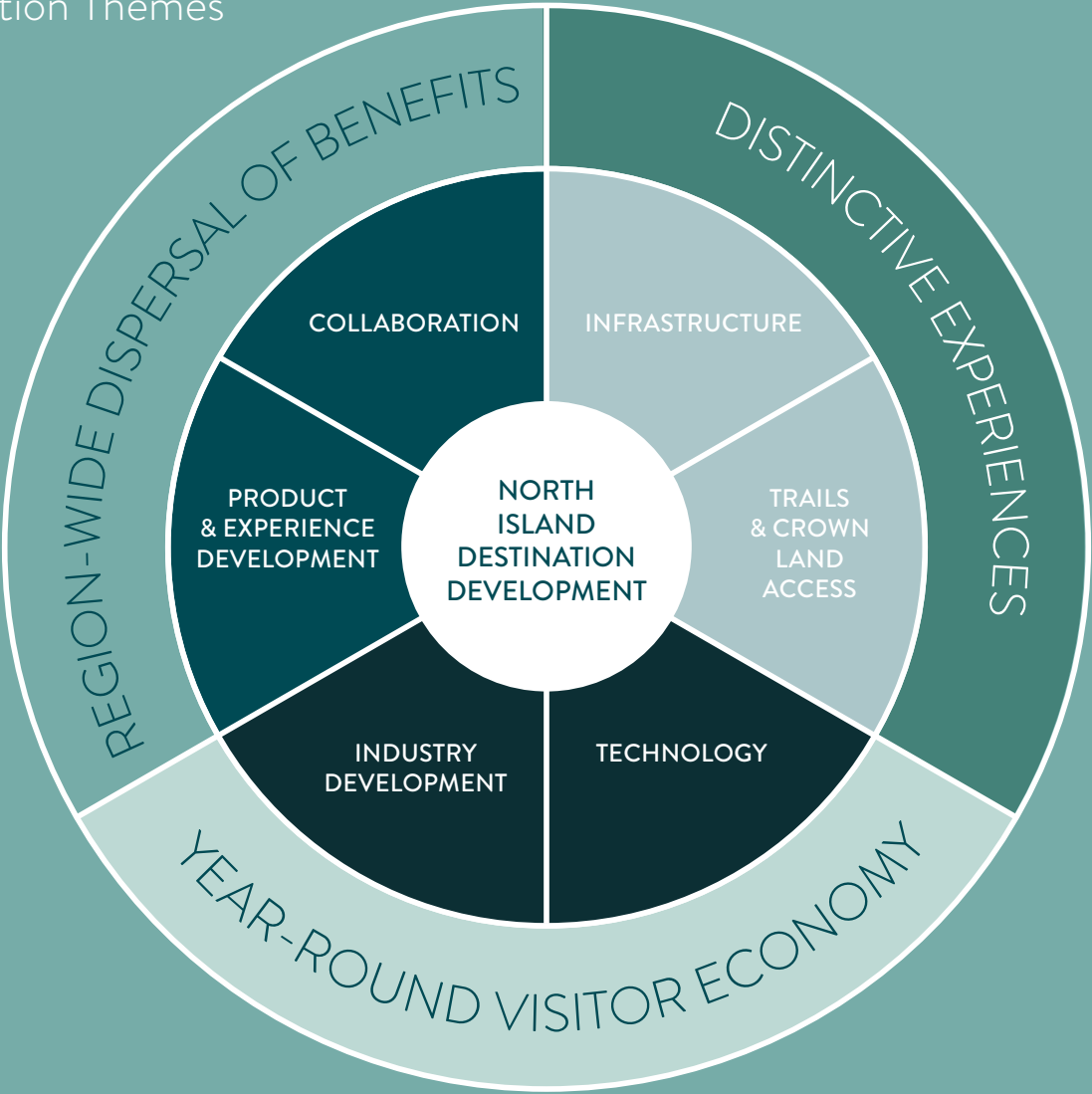
The interplay between land and sea has created an environment that impacts everything from local culinary experiences and festivals of the sea, to a temperate maritime climate that has allowed for the cultivation of distinctive gardens, local produce and the growth of farmers' markets. Equally, the bounty of land and sea is reflected in the growing music, arts and craft sector, the overall desirability and appeal of the area for residents and amenity migrants, and the sense of healthy living that has come to be associated with the North Island.

E. DEVELOPMENT THEMES

Similar to motivating experiences, there is a need to identify the development themes that will focus attention for the next 10 years. Destination development planning themes define the priorities that have surfaced from tourism partners through

the planning process, and support both the vision and goals, as well as motivating experiences. Six destination development themes have been identified to focus strategic efforts. Each theme has objectives and actions identified to support it.

FIGURE 9:
Development and
Destination Themes



DEVELOPMENT THEME	RATIONALE
-------------------	-----------

INFRASTRUCTURE	<p>Tourism infrastructure can refer to any capital asset or service that enables the movement of visitors to, and within, the destination, and creates access for attractions, events, and facilities. This section deals with hard infrastructure (e.g., transportation) while soft infrastructure (e.g., technology, human resources) are addressed in other sections of this strategy.</p> <p>Transportation is a crucial component of the tourism economy in BC. Within the planning area it plays a bigger role than elsewhere, given the predominance of ferry travel and the importance of air connectivity. Indeed, the transportation experience often sets the tone for travel and leaves impressions that can last a lifetime.</p> <p>For Vancouver Island the transportation experience is not always a positive one. In a survey of Vancouver Island residents last year, Tourism Vancouver Island (TVI) found that one of the biggest discrepancies between perceived importance and perceived performance was in the accessibility of transportation systems such as highways, rails, ferries, and airports.⁷ Feedback at the planning sessions noted that visitors arriving without personal vehicles (rented or owned) face significant challenges moving from points of entry at air and ferry terminals to accommodation, downtown shopping areas, and other areas of interest. Moving between communities can be equally demanding, especially when the various island groups are considered, where ground transportation options are not coordinated particularly well with ferry services.</p> <p>The recommendations address challenges relating to transportation to the planning area, connectivity within the planning area, and between ports of entry and local destinations. Other initiatives relate to specific aspects of transportation including cycling and marine infrastructure, and to the issue of affordable housing — a concern that has become prevalent across much of the province.</p>
-----------------------	--

TRAILS AND CROWN LAND ACCESS	<p>Trails are a critical piece of public infrastructure with significant benefits for both residents and visitors. They generate health benefits by encouraging an active lifestyle, serve as an alternative mode of transportation, and provide access and linkages between and within communities and areas of natural and cultural interest. Trails are inexpensive to use and readily accessible to most. If developed properly they can attract persons with disabilities, children and youth, the elderly, and others who may have fewer opportunities to be physically active. Economically, trails tend to increase property values and can lead to employment and wealth creation in the tourism economy.</p> <p>The North Island has the advantage of having a mix of trails for hiking, mountain biking, all-terrain vehicle usage, and horse-riding. In addition, there are fresh water, ocean canoe, and kayak trails. Many communities are working on trail projects which will create a much stronger network and opportunities for visitor experiences. TVI is contributing to trails-related efforts with the completion of the Hiking Tourism Master Plan (2016) for Vancouver Island, the Gulf Islands, and the Sunshine Coast, whose objective is to create an exceptional hiking experience network.</p> <p>While the upside development potential of trails is considerable, the challenges of building new trails and maintaining existing trails are equally substantial. There is a need to look at all aspects of access to the backcountry, stewardship, and capacity management, and the opportunity to continue to work in strategic partnerships. With a well-coordinated approach, there will be more efficient use of funds, less duplication of effort, a sharing of best practices, and the development of a cohesive North Island trails product. It is noted that the Hiking Tourism Master Plan constitutes a major addition to the planning landscape, and although the plan is confined to hiking, it is referenced in the following recommendations where applicable.</p>
-------------------------------------	---

⁷Tourism Vancouver Island. 2016. 2016 Vancouver Island Resident Survey.

DEVELOPMENT THEME	RATIONALE
-------------------	-----------

COLLABORATION	<p>Given the complexity of tourism with the multiple interests involved, and the value to be gained from adopting a North Island perspective on competitiveness, there is a need to regularly engage in relevant cross-planning area discussions on supply related factors. An ongoing dialogue on the issues and opportunities raised in this strategy will play a significant role in ensuring that progress is made, and that potential synergies between tourism initiatives and local, provincial, and federal policies are identified and maximized.</p> <p>For the implementation of this strategy to succeed over the next 10 years, increased dialogue among provincial agencies and planning area stakeholders is necessary, and ideally will lead to a more cohesive approach to satisfactorily resolving the supply factors as identified in this strategy. Collaborative frameworks exist, such as the recently established Marine Plan Partnership between First Nations and FLNR, but there remains a need for developing further mechanisms of this nature. Monitoring the value of those that exist and advocating for further collaboration underlies a number of the recommendations under this development theme.</p> <p>In addition, continuing to recognize and promote the value of tourism and improving awareness of the interplay and impact of resource management decisions on tourism and the visitor experience are important at all levels — from the community through to government ministries and Crown corporations. The visitor experience is based on maintaining the integrity of the tourism resource base, and working to achieve this needs an integrated and partnership-based approach that is well-informed.</p>
----------------------	--

TECHNOLOGY	<p>Economic and industrial change is increasing rapidly due to advances in technology. The Internet, computer systems, mobile technologies, wearable technologies and drone technologies have revolutionized how people engage in their travel experience. Businesses have responded by integrating technology into all aspects of operations, providing new services, greater convenience and new ways of engagement during the complete research/purchase/trip cycle.</p> <p>Technology-related innovations are advancing at a prolific rate — for example, in the converging use of social media, smart phones, and wearable technologies. If technology is revolutionizing the travel industry, then tourism destinations will have to recognize, understand, and adapt to both the impacts and the potential opportunities to remain competitive.</p> <p>For the North Island, upgrading telecommunications capacity through improved cell and wi-fi networks; modernizing visitor information services through quality, user-friendly and consistent year-round information; engaging visitors more effectively through technology; and, encouraging smart businesses that are flexible, dynamic, collaborative, and able to move swiftly to leverage market opportunities should all be encouraged.</p>
-------------------	--

INDUSTRY DEVELOPMENT	<p>Destination development requires a quality and skilled tourism workforce and labour market intelligence that is useful for tourism operators. The tourism industry continues to experience considerable change in the economic, competitive and technological landscapes that have important implications for human resources as a business and industry input. In 2015, tourism contributed more to provincial GDP than any other primary resource industry including oil and gas extraction (\$7.2 billion), mining (\$3.8 billion), forestry and logging (\$1.9 billion), and agriculture and fish (\$1.5 billion), with the majority of this in the form of wages and salaries[*]. Yet the industry continues to face persistent shortages of entry level and skilled labour, high turnover, recruitment and retention challenges, a poor image as career industry, uneven accreditation standards, and lagging productivity. The planning sessions indicated that visitors to the area are likely to experience considerable variations in the experience, skills, and qualifications of tourism workers they encounter while on their travels. Training and tourism education for Indigenous workers were identified as areas that required improvement and will need to be addressed if the product potential of the Indigenous sector is to be fully realized.</p> <p>In addition to working toward improving training opportunities and profiling the benefits of a career in tourism, there is also a need to highlight best practices. Where existing small business operators can experience this first-hand, the impact can be quite significant. Clearly a combination of approaches is required to strengthen the capacity of industry to deliver remarkable experiences. The recommendations recognize the need to expand and build on a variety of existing programs.</p> <p>Human resource development is stated as a priority in higher level tourism strategies, including the government's tourism strategy, and Canada's Federal Tourism Strategy: Welcoming the World. go2HR, the provincial organization dedicated to supporting the development of a strong workforce, is focused on all aspects of recruitment, retention, and professional development. Moving forward, a collaborative approach that utilizes these resources (in combination with regional-based expertise from within the education institutions in North Island) will assist in providing solutions that are based on local and regional needs and opportunities. At the same time, these institutions need to be supported in identifying and delivering appropriate solutions.</p>
-----------------------------	---

^{*}[www.destinationbc.ca/getattachment/Research/Industry-Performance/Value-of-Tourism/Value-of-Tourism-in-British-Columbia-%E2%80%93-A-Snaps-\(1\)/Value-of-Tourism-2015-Snapshot.pdf.aspx](http://www.destinationbc.ca/getattachment/Research/Industry-Performance/Value-of-Tourism/Value-of-Tourism-in-British-Columbia-%E2%80%93-A-Snaps-(1)/Value-of-Tourism-2015-Snapshot.pdf.aspx)

DEVELOPMENT THEME	RATIONALE
PRODUCT & EXPERIENCE DEVELOPMENT	<p>Tourism operators provide products and services to visitors that collectively generate their experiences. Operators have a tremendous influence on the destination given that they invest the money, promote the region, bring in the markets, generate the jobs and income, and in so doing strive to protect the environment and preserve history and cultural heritage. Ideally, tourism operators will also be innovative and responsive to constantly evolving consumer preferences, demographic change, fragmenting markets, and macro-economic events by assessing existing products and developing new experiences.</p> <p>The North Island planning area is home to approximately 800 tourism and tourism-related businesses ranging from accommodators, food and beverage establishments and rental services, to wineries, and destination attractions. As they are on the front line of service delivery, the competitiveness of these operators, and the experiences they create for visitors, has a direct bearing on destination development. However, capital, management and operating expertise, labour, and other inputs such as Crown land access can be difficult to come by and can weaken competitiveness. As these inputs are addressed, the quality of the overall experience will improve. At the same time, the seasonality of visitation, which is currently oriented to the June-September period, constrains cash flow and the viability of businesses. As efforts are made to lengthen the visitor season, create reasons for visiting year-round, and develop new experiences throughout the planning area, both the viability of businesses and the distribution of benefits will improve. In turn, these changes will provide a stronger base for reinvesting in product and visitor experience development.</p> <p>As industry capacity is strengthened, and as structural issues relating to supply factors such as transportation are addressed, the North Island will be in a stronger position to work on creating new experiences. It is anticipated that these experiences will leverage the experience themes identified in this strategy and will enhance the overall positioning of the planning area. As such, the work under this development theme will support the following key goals:</p> <ol style="list-style-type: none"> 1. Develop distinctive experiences with a high level of market appeal 2. Build a year-round visitor economy 3. Disperse the benefits of tourism throughout the North Island <p>In addition, the provincial goals of the Destination Development Program will also be supported through gains made under this theme to:</p> <ol style="list-style-type: none"> 4. Lead Canada in growth of overnight visitor expenditures. 5. Secure the highest Net Promoter Score in North America.

F. INTERACTION OF DEVELOPMENT THEMES AND MOTIVATING EXPERIENCES

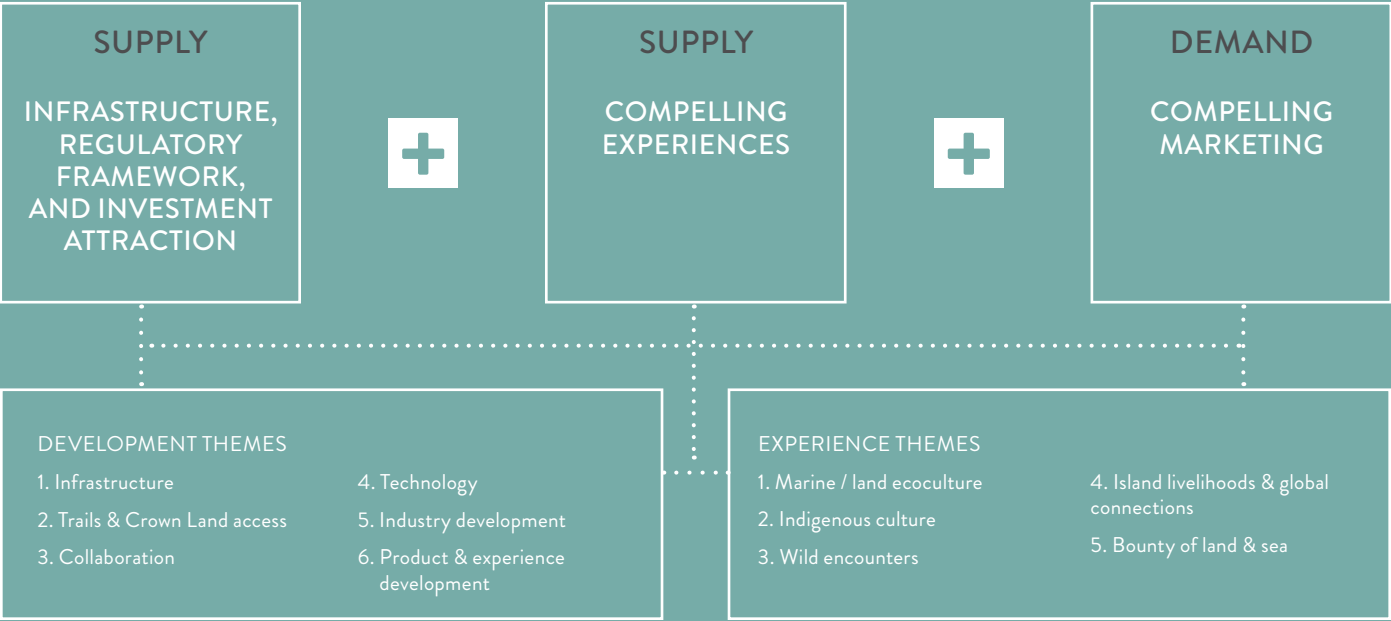
For any destination development plan to achieve its goals, there must be coordinated interaction with the other components of the tourism development process. As mentioned in Section 1, tourism has two primary revenue drivers — supply and demand. Destination development focuses on the supply side of tourism by providing the setting, access, policy framework, investment attraction, experiences, and visitor services to attract new visitors and entice repeat visitation. Demand side marketing efforts strive to create urgency for people to want to visit.

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

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

Each of the six development themes will contribute to each of the experience themes that have been determined for the North Island, although they will do so at different levels, based on the actual objectives recommended.

FIGURE 10: Interaction of Development Themes and Experiences Themes



7

STRATEGY AT A GLANCE

CUMBERLAND
Photo: BC Ale Trail

NORTH ISLAND: A DISTINCTIVE DESTINATION

VISION	The North 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 government to ensure that the planning area'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.		
GOALS	<ul style="list-style-type: none"> • Develop distinctive experiences with a high level of market appeal. 	<ul style="list-style-type: none"> • Build a year-round visitor economy. 	<ul style="list-style-type: none"> • Disperse the benefits of tourism throughout the North Island.
USPs	<ol style="list-style-type: none"> 1. Intimate connection to the marine environment 2. Unspoiled, protected coastal areas surrounded by stunning landscapes 	<ol style="list-style-type: none"> 3. Vast rainforests 4. Rich Indigenous culture 	<ol style="list-style-type: none"> 5. Wildlife viewing and nature observation 6. Local food
MOTIVATING EXPERIENCES	<ul style="list-style-type: none"> • Marine and land ecoculture • Indigenous culture 	<ul style="list-style-type: none"> • Wild encounters • Island livelihoods and global connections 	<ul style="list-style-type: none"> • Bounty of land and sea
DEVELOPMENT THEMES	<p>THEME 1: Tourism Infrastructure</p> <p>THEME 2: Trails and Crown Land Access</p>	<p>THEME 3: Planning and Collaboration</p> <p>THEME 4: Innovative Technology</p>	<p>THEME 5: Industry Development</p> <p>THEME 6: Product and Experience Development</p>



STRATEGIC PRIORITIES

QUADRA ISLAND
Photo: Brian Caissie

FRAMEWORK The North Island Destination Development Working Committee utilized a framework to determine the prioritization of each objective and the relative timing for implementation:

1. QUICK WINS — high value tactics with low complexity and can be achieved within three years (2018–2021).

2. LONGER TERM ACTIONS — high value, high complexity that require four to 10 years to achieve the result (2022–2028) albeit activities can begin immediately to achieve the outcome.

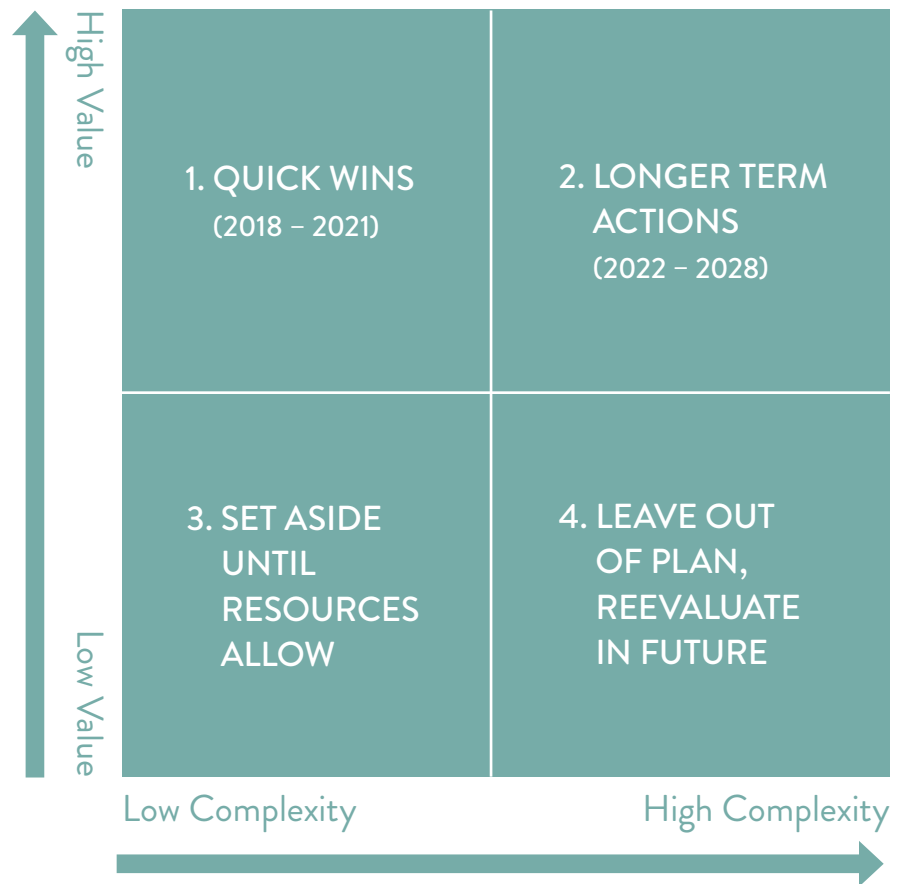
3. SET ASIDE UNTIL RESOURCES ALLOW — low complexity and low value, address when time/resources exist.

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

Presenting the destination development objectives within a consistent framework will allow the province and North Island to examine the various priorities across all planning areas to identify those which belong within a regional or provincial strategy. The success network is identified⁹, and where the proposed objective has provincial or regional scope beyond this planning area, it is noted.

⁹Organizations and partners listed under the success networks have been identified collectively through the strategy development process as likely playing a role in moving a potential objective or action forward. In no way is this meant to suggest any form of commitment or endorsement of the objective or action.

FIGURE 11: Priority Setting Framework



OBJECTIVES AND ACTIONS

In total, 47 objectives were identified for the the North Island for the next 10 years. The following section outlines the objectives by each development theme, the priority, and relative timing for implementation. It also identifies the priority actions within each objective.

This is not meant to be an exhaustive list of all tactical implementation activities, but a highlight of the priorities. As such, objectives or actions may require a more detailed implementation plan.

THEME 1: TOURISM INFRASTRUCTURE

THEME 1: TOURISM INFRASTRUCTURE	PRIORITY
<p>1. Create a rural roads task force that will communicate and promote the value of logging roads to the visitor experience in the planning area.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Prepare an inventory of key logging roads with prioritization set according to use levels and purpose as: <ul style="list-style-type: none"> - access corridors - staging areas - play areas • Prepare a policy statement on not decommissioning select routes. • Work with FLNR, ENV, and licensees to assist with the prioritization and discussion of budgetary constraints to maintaining the select routes. <p>SUCCESS NETWORK FLNR, ENV, licensees (permit holders), First Nations, TVI, Local government , BC Parks, RSTBC</p>	<p>1. QUICK WINS</p>
<p>2. Develop a Vancouver Island Transportation Plan, with a section on addressing the unique challenges of moving visitors around the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with the provincial government to identify the opportunity to lead the preparation of a Vancouver Island Transportation Plan as a regional sub-plan of BC On the Move. • Work with other partners such as regional districts (which have their own transportation plans), the Vancouver Island Economic Alliance and Vancouver Island Association of Coastal Communities to establish a Tourism Transportation Task Force for the purpose of preparing a tourism transportation policy brief. • Encourage local government to integrate and connect their active transportation plans and infrastructure, specifically hiking and cycling, to facilitate non-motorized access and use. Coordinate and merge existing local plans into a regional plan, if appropriate. <p>SUCCESS NETWORK Local government, Vancouver Island Association of Coastal Communities, Transportation service providers (ports, terminals, airports), BC Transit, TRAN, Vancouver Island Economic Alliance, TVI</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>3. Improve inter-community connectivity.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • For the North Island area (specifically Mount Waddington), encourage local government to continue pursuing transit service between communities, to and from airports and ferry terminals, and to identify future needs so visitors without personal vehicles can navigate the planning area. • Strive to make the planning area more cycle-friendly, first within communities and then between communities and destination areas. Cyclo-tourism is a huge growth area but it requires supportive infrastructure to ensure safety and accessibility – see also 9. • Investigate peer-to-peer sharing models to see if there is a potential application in the North Island. Look at non-conventional car and ride sharing options that would be an alternative to conventional car rentals, which are under-served north of Campbell River and which preclude use of gravel roads and thus access to many tourism features. • Improved public transit services, like Acadian National Park in Maine, which offers free public transport as part of the park use fee with hop-on hop-off services, connecting to all major features. This type of service can offset the need to pave new roads, and to increase availability of parking lots and amenities. Consider coordinating this with the Whale Heritage Site initiative. • DMOs should be encouraged to provide guidance and direction on moving around the planning area without a car, promoting available services and google mapping sites to improve the visitors' ability to safely move around the North Island. <p>SUCCESS NETWORK Local government, Vancouver Island Association of Coastal Communities, Transportation service providers (ports, terminals, airports), BC Transit, TRAN, Vancouver Island Economic Alliance, TVI, DMOs</p>	<p>1. QUICK WINS</p>

THEME 1: TOURISM INFRASTRUCTURE	PRIORITY
<p>4. Develop a business case for coordinating more air connections to the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Document previous discussions with Harbour Air and continue to encourage their interest in increasing services. • Identify and sponsor a pilot project linked to a specific seasonal adventure that would generate demand. This could be linked to a high-end lodge or resort. Prepare and maintain a list of air service providers, other than Harbour Air, who may be interested in leading or participating in the pilot. • Identify weak spots in ground transportation services that may be adversely impacting the visitor experience at airports and discouraging air service providers from promoting the planning area. Expensive and limited car rentals are said to be making it difficult to access mountain resorts, ferries, and backcountry areas. • Work to maintain passenger volumes, air services, and regional status at the Comox Airport, which is an important feeder to the entire North Island. As new regional routes open up, there is an opportunity to generate increased demand through new markets. • Consider an initiative to attract a direct to/from Seattle air service, most likely to Comox. Better service to the Washington market and Seattle specifically would improve connectivity to this important US market. <p>SUCCESS NETWORK TVI, Airports, Local government</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>
<p>5. Develop an evaluation model through which boat launches, docks, marinas, other marine infrastructure and amenities can be listed and prioritized.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with TVI to see if the tourism inventory spreadsheet can be adapted to house such a model. • Work with MaPP to assess coastal infrastructure within the context of existing marine plans. This work can be supported by the work of the TAC tourism Branch on assessing value of tourism resources and infrastructure. • Enquire with DataBC about assisting, as a pilot project, with data retrieval and mapping. This may be of interest as part of the province's Open Data Initiative. • Enquire with the BC Marine Conservation Analysis for access to existing data sets. • Develop a set of criteria (e.g., use levels, condition, ongoing investment and maintenance requirements) which can be used to differentiate and rank infrastructure. • Classify and map all infrastructure. • Identify gaps in small harbour services, and prioritize infrastructure improvements for visiting boaters. <p>SUCCESS NETWORK Fisheries and Oceans Canada, Port and harbour authorities, MaPP, TAC, Local government, Harbour/maritime societies, TVI</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>
<p>6. Prepare a Boating Development Guide to help local government with developing infrastructure and services that will extract more value out of visiting boaters.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with the Comox Valley, which has a program for connecting visiting boaters to communities, to identify the scope and content for a guide. • Target development and services to higher-spend markets such as motorized boating and coastal cruising. • Use all levels of DMOs to share information with visitors that will promote higher levels of spend on marine-related activities. • Consider a survey of visiting boaters to quantify the potential for different services and amenities. • Explore linkages with the activities of MaPP and BC Parks (marine planning) to leverage complementary projects. <p>SUCCESS NETWORK Port and harbour authorities, MaPP, Local government, Harbour/maritime societies, TVI, DBC, Local DMOs</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>

THEME 1: TOURISM INFRASTRUCTURE	PRIORITY
<p>7. Prepare a pre-feasibility assessment of a regional pocket cruise that would operate between Vancouver and Seattle and the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Prepare terms of reference for a pocket cruise product. • Conduct research on other pocket cruising trends and developments, and identify a unique selling feature that would attract investor interest. <p>SUCCESS NETWORK Regional economic development offices, TVI, Local government</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p>
<p>8. Develop a BC Ferries communications and advocacy strategy.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Encourage local government to include tourism representatives in their delegations when dealing with BC Ferries. • Encourage BC Ferries to provide timely and accurate forewarning of schedule and service changes so that industry can prepare and adapt their services accordingly. • Encourage BC Ferries to incorporate a tourism mandate into their corporate strategic plan. • Work with BC Ferries to develop, feature and market off-season packages that will appeal to potential visitors. • Negotiate a data-sharing agreement between the province and BC Ferries for access to scheduling information and other corporate services in digital formats suitable for future app development by communities and the planning area. <p>SUCCESS NETWORK Local government, BC Ferries, TVI</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>
<p>9. Advocate for a more user-friendly and accessible cycling destinations on the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with Comox Valley Cycling Coalition to see if it is feasible to expand its geographic scope to the entire North Island. • Advocate for safe, cycle-friendly roadways, building on the BC Cycling Coalition efforts. • Identify and promote new corridor routes on the North Island and assist local government with raising funding for new and expanded infrastructure, including more bike-friendly pullouts and rest stops on major highways. This would result in the development of new longer-distance cycling experiences, and would leverage local initiatives such as the development of new cycle lanes from the highway to Sayward Village Centre. • Encourage agri-food and agritourism operators to enhance their cycling facilities to attract more cyclists. The Comox Valley Farm Cycle tour is currently a one-day event, but the concept of visiting farms on a cycling itinerary could be expanded. <p>SUCCESS NETWORK BC Cycling Coalition, Comox Valley Cycling Coalition, TRAN, Local government, AGRI</p>	<p>2. LONGER TERM ACTIONS</p>
<p>10. Develop a signage strategy that is more responsive to visitor needs and provides consistency across jurisdictions.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Conduct a planning area-wide signage audit. • Prepare an inventory of local government signage manuals and policies, and work with signage partners on a planning area-wide signage framework. • Work with small communities to identify, report, and monitor provincial highway signage standards. • Work with First Nations to integrate their needs and expectations, as noted in the <i>Vancouver Island Regional Aboriginal Tourism Strategy</i> (2014). • Use signage to enhance visitor services at highway rest areas. • Align highway and trail signage guidelines so wayfinding is consistently delivered across locations. <p>SUCCESS NETWORK TRAN, BC Parks, Local government. ITBC, TVI</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p>

THEME 1: TOURISM INFRASTRUCTURE	PRIORITY
<p>11. Support local government housing initiatives that address worker and visitor housing and accommodation options.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Assess local government housing initiatives in the planning area, and identify the implications for the tourism labour market. • Review best practices in other resort communities, and prepare a research brief with lessons learned that may be applied regionally. Major resort communities like Whistler and Sun Peaks have innovative approaches to worker housing and although some are tied to municipal legislation (such as housing authorities), others may have relevance for the planning area's communities. • Investigate the feasibility of developing a tourism housing strategy, which would require the full support of local government. • Improve and expand collaboration among industry, government, and other stakeholders on the implementation of planning area-wide housing solutions. • Provide information to governments on barriers to recruiting and retaining employees, particularly in rural areas, to increase awareness of issues related to transportation, lack of affordable housing, and the high cost-of-living. • Conduct research on short term rental policies and ways in which local government can be more responsive to the needs of tourism workers. In the Thompson Nicola Regional District, for example, property owners now require a temporary-use permit for short-term rentals, as a step toward assessing the need for a new short-term rental zoning class and controlling the increase in this form of rental activity in areas currently without commercial zoning. • Conduct research on the conversion or adaptive reuse of under-utilized and abandoned buildings for housing tourism workers. <p>SUCCESS NETWORK Local government, BC Housing, MAH, go2HR, TVI</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>PROVINCIAL SCOPE</p>
<p>12. Improve cellular, broadband and wi-fi services on the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Inventory cell coverage in the main service areas and identify gaps, with priority given to those where the lack of service is known to have significant adverse effects on the visitor experience. A key joint federal-provincial initiative, Connected Coast, is working toward creating a coastal backbone network with new or updated high-speed internet service running between Prince Rupert, Vancouver, and around Vancouver Island connected via a 3,500-km subsea cable. Under this project, Strathcona Regional District will receive funding to service 131 communities, including the Sunshine Coast. • Identify planned future improvements by major service providers, including assessing how smaller internet service providers will be able to connect to the backbone to offer service. • Develop a planning area-wide plan that targets anticipated coverage in 10 years, and identifies options for closing the gaps through the Connected Coast and related initiatives. Use the plan to work toward delivering service throughout the planning area that meets federal service standards. • Develop a business case for service providers meeting the needs of remoter locations. • Coordinate with evolving federal regulatory initiatives on cell and broadband strategies, including affordable access and minimum targets for network availability and speeds. Canada has set universal service targets and appropriated funding should be accessed if needed (see Connect to Innovate below). • Monitor the federal government's universal broadband goal of 50Mbps and unlimited data for all Canadians. • Ensure visitor services are doing an adequate job informing visitors of the level of services available through mobile coverage and wi-fi services, especially in remote locations. Such services should be included on maps and apps. <p>SUCCESS NETWORK Local government, Innovation Island, Telecommunications companies, First Nations, IRR, CITZ, Federal Government (Pathways Project, CRTC, Connect to Innovate), TVI</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>

THEME 2: TRAILS AND CROWN LAND ACCESS

THEME 2: TRAILS AND CROWN LAND ACCESS	PRIORITY
<p>13. Encourage ATV services and guided experiences, building on the expanding trail network in the Strathcona region.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Engage with Tahsis, Gold River, Zeballos, and Campbell River to see how a marketable experience could be developed. Build on the following two initiatives as a first step: <ul style="list-style-type: none"> The Campbell River ATV Club has been meeting communities around the North Island to explore developing a 400 km circle tour from Campbell River to Gold River, then north to Sayward, and back to Campbell River. The Village of Tahsis is partnering with the Village of Zeballos, Mowachaht/Muchalaht First Nation, Ehattesaht First Nation, and other regional and provincial stakeholders to develop a network of ATV trails using deactivated logging roads. Identify services and amenities that could be developed over time to create a destination experience. The Pye Mountain Recreation Site 35kms north of Campbell River, which opened in 2016, provides a template for an off-road vehicle campsite and staging area, and was a partnership initiative between Campbell River ATV Club and RSTBC. Assess infrastructure and service requirements to develop ATV trails as a snowmobiling asset. <p>SUCCESS NETWORK Campbell River ATV Club, other clubs, RSTBC, Local government, First Nations</p>	<p>2. LONGER TERM ACTIONS</p>
<p>14. Identify exceptional trails on the North Coast to complement and enhance TVI's Hiking Master Plan.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Use the Hiking Tourism Master Plan as a baseline for creating a trails inventory, consulting with other trail organizations (e.g., cycling, equestrian) to add information and fill data gaps. Municipal trail systems should be included. It should be noted that the large majority of trails documented in the Master Plan are multiple-use trails (and not just hiking) and there is good market potential in all categories, with cycling being a higher-value market than most. As also recommended in the Master Plan, spatial/GIS functionality would allow the creation of a trails atlas, map products and a more effective planning process. The Master Plan's recommendation for an annual call to update the inventory should be prioritized. A cost and benefit methodology for prioritizing trail development and improvement should be devised so there can be more informed and targeted discussions about where resources and efforts can best be allocated. Unique or iconic trails may appear the most appropriate on the surface, but may not actually represent the best economic return. Issues of regional equity and connectivity should also factor into discussions. The Master Plan recommendation for exceptional experiences should also be implemented, with consideration given to all forms of trail use. Increased engagement with the provincial government (as recommended in the Trails Strategy for British Columbia), local government, and trail groups would lead to a better planning environment by bringing additional resources and experiences to the planning table. Investigate the potential for a Nimpkish Valley rail trail. The closure of the Englewood logging train in 2017 by Western Forest Products opens up an opportunity to discuss developing a new rail trail experience. Continue with the development of the North Island section of the Vancouver Island Spine Trail. When complete, this trail will cover the 700 km distance between Victoria and Cape Scott, and will be open to hikers, mountain bikers and horseback riders. Continue to build on the work of the Back Country Horsemen of BC and RSTBC in maintaining the recently developed Salmon Brewster Equine Trail to wilderness standards. <p>SUCCESS NETWORK Local government, BC Parks, RSTBC, AGRI, Trail societies and stewards, First Nations, IRR, Trails BC, Cyclotouring BC, BC Cycling Coalition, Back Country Horsemen of BC, Horse Council BC, Trans Canada Trail Foundation, TVI, WFP, North Island College</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>

THEME 2: TRAILS AND CROWN LAND ACCESS	PRIORITY
<p>15. Encourage BC Parks to undertake new management plans for select parks in the planning area that incorporate a much higher profile tourism mandate and management direction.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Encourage BC Parks to think and plan more like a tourism stakeholder, something that should be incorporated into new management plans. • Provide support for greater outreach and provision of visitor services, including through electronic media (e.g., touchscreen terminals, smart phone apps, maps, and other digital resources). • Encourage greater emphasis on informing visitors about experiences outside park boundaries and in nearby communities. • Encourage greater cooperation between parks operations and local DMOs on visitor services. • Encourage greater consideration and investment in non-traditional infrastructure (such as the yurt recently developed in Strathcona Provincial Park) to increase visitor interest. • Advocate for greater local participation in management planning, that includes First Nations and local government. <p>SUCCESS NETWORK TVI, Local government, BC Parks, First Nations, DMOs, Visitor Centres</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>16. Examine the feasibility of a BC Parks Interpretive Visitor Centre on the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Meet with BC Parks and local DMOs to determine the feasibility of creating an interpretive centre that can be combined with the delivery of other information services. • Evaluate how technology can be incorporated into a centre to increase the interpretive impact of the stories, culture, history, and outdoor adventures. <p>SUCCESS NETWORK Local government, Provincial and federal land and ocean-based ministries and agencies, First Nations, IRR, TVI</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p>
<p>17. Update the Vancouver Island Land Use Plan and improve its relevance to tourism.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Investigate the opportunity to formally extend the mandate of the inter-ministry West Coast Sector Agency to include tourism in its scope, and to connect Ministry of Tourism, Arts and Culture policy analysts with regional resource-based ministry decision makers. • Revisit the Vancouver Island Land Use Plan and update to include a higher profile role for tourism. Zoning was identified in the original plan but is rarely utilized by government. <p>SUCCESS NETWORK Local government, Provincial and federal land and ocean-based ministries and agencies, First Nations, IRR, TVI</p>	<p>1. QUICK WINS</p> <p>PROVINCIAL SCOPE</p>
<p>18. Develop a consistent trail sustainability program that maintains the current quality of experience while diverting use to under-utilized trails.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with BC Parks to address the influx of visitors on long weekends in parks such as Cape Scott Provincial Park, perhaps directing them to alternative trails. • Consult with rangers on identifying development capacity needs and safety concerns. • Seek to coordinate and promote all trails, both inside and outside the provincial parks. <p>SUCCESS NETWORK TVI, Local government, BC Parks, FLNR, RSTBC, TVI</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>REGIONAL SCOPE</p>

THEME 2: TRAILS AND CROWN LAND ACCESS	PRIORITY
<p>19. Promote a consistent, cohesive and acknowledged backcountry stewardship policy.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with the Wilderness Tourism Association, government and First Nations to promote existing policy to tourism operators. • Provide better access to local businesses regarding stewardship and permission information and how these discussions are brokered. • Seek to have guardian watchmen programs coordinated across the planning area. • Review and update current management plans to encourage more tourism use. <p>SUCCESS NETWORK Wilderness Tourism Association, TVI, FLNR, RSTBC</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>PROVINCIAL SCOPE</p>
<p>20. Catalogue, curate and promote interpretive resources linked to the trail systems to stimulate visitor interest and awareness of local culture.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with First Nations to develop a trails and stories database that includes history, traditional uses, and current uses. Establish protocols for using these stories as part of the visitor experience. • Work with TVI to catalogue and curate stories of European explorers and settlers, pioneer economies, and more recent times to appeal to targeted EQ segments. <p>SUCCESS NETWORK TVI, First Nations, RSTBC, TVI, ITBC, Community museums</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>21. Build a better baseline that will assist future development of a marine trail product on the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with marine tourism partners, notably the BC Marine Trails Network Association and AHOY BC, as they continue to develop the BC Coast — the Vancouver Island North Circle Route (making it the third marine trail in addition to the Salish Sea and Sea to Sky trails that already exist). Continue to: <ul style="list-style-type: none"> - Identify an inventory and assessment of sites along both the Inside Passage and west coast that will contribute to a trail. - Identify service hubs and target assistance to create stronger staging areas for marine tourism along the route. - Encourage the integration of Indigenous tourism themes, products and partners in trail activities and promotions. - Participate in discussions and coordination with the Salish Sea and Washington State marine trail initiatives. <p>SUCCESS NETWORK TVI, Local government, BC Parks, FLNR, RSTBC, TVII</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>REGIONAL SCOPE</p>

THEME 3: COLLABORATION

THEME 3: COLLABORATION	PRIORITY
<p>22. Create a mechanism to implement, monitor, and follow up on the Destination Development Strategy.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Invite First Nations to become part of this process to ensure government agencies and non-government organizations (NGOs) are able to provide funding and other support for catalyst projects. • Encourage ITBC to prepare case studies and fact sheets of local success stories that can be used to promote tourism development. • Work with the existing Tourism Advisory Committee (within the Mount Waddington Regional District) on a monitoring and reporting mechanism for the Destination Development Strategy. • Work with the Tourism Advisory Committee to develop a communications plan to raise awareness of the strategy within the planning area. <p>SUCCESS NETWORK TVI, ITBC, First Nations, Local government, Tourism Advisory Committee</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>
<p>23. Prepare a Value of Tourism study for the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Using Destination BC's Value of Tourism methodology, quantify tourism's role as an economic base sector. • Draw a more informative picture of the relationship between tourism and community stability, resident attraction and retention, recreation, and lifestyle benefits. • Ensure DMOs, local government, and other tourism ambassadors use impact data to communicate with their constituents. • Work with First Nations, TVI, and ITBC to promote the value of tourism in their communities as a way of facilitating implementation. • Encourage industry to collectively promote tourism careers and opportunities for youth. • Encourage local government to explicitly include tourism visions, objectives, and policies in their official community planning. <p>SUCCESS NETWORK Local government, DBC, TVI, DMOs, Chambers of Commerce, TIABC, Wilderness Tourism Association, ITBC, Open Data Initiative</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>24. Encourage all ministries and Crown corporations that have the potential to influence tourism, state their role in tourism as an economic development priority.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Research and assemble content for a short guidebook on how land and resource management, and other government decision-making, impacts tourism development. Illustrate with case examples from the North Island, quantifying adverse economic and community impacts where possible to demonstrate implications of resource-based decisions on the tourism sector (e.g., the implications of logging road closures). • Advocate for the inclusion of tourism in the mandate letters of all relevant ministries. • Investigate the opportunity to formally extend the mandate of the inter-ministry West Coast Sector Agency to include tourism in its scope, and to connect Ministry of Tourism, Arts and Culture policy analysts with regional resource-based ministry decision makers. <p>SUCCESS NETWORK TIABC, Local government, Wilderness Tourism Association</p>	<p>2. LONGER TERM ACTIONS</p> <p>PROVINCIAL SCOPE</p>

THEME 3: COLLABORATION	PRIORITY
<p>25. Closely review the implementation of the North Vancouver Island Marine Plan, and work through the partnership to protect the integrity of marine and near-shore cultural and heritage resources.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Utilize the inventories and site knowledge on cultural and heritage resources gained through implementation of the plan to build a greater understanding of tangible and intangible assets that can be part of a visitor experience or the overarching story (depending on site sensitivity and Indigenous protocols). Monitor the outcomes of initiatives as the basis for sharing best practices with South Central Island. Support the Nanwakolas member First Nations in the planning, management, and coordination of commercial recreation and tourism activities in the planning area. <p>SUCCESS NETWORK TVI, ITBC, FLNR, The Nanwakolas Council</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>26. Promote greater collaboration among local government on tourism planning.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Encourage local government to explicitly address tourism through the available planning tools allowed by the Local Government Act (e.g., regional growth strategies, regional context statements, and implementation agreements). Integrate tourism into other related planning processes, including agriculture (role and direction of agritourism), heritage conservation, signage, transportation, parks, recreation and trails, and site master planning. Promote integrated destination planning and development for tourism. Encourage regular dialogue between economic development offices and DMOs within the planning area on issues and opportunities relating to destination development. <p>SUCCESS NETWORK Local government, DMOs, Chambers, Economic development offices</p>	<p>1. QUICK WINS</p>
<p>27. Create a tourism ambassador program to provide more memorable experiences for visitors to the North Island</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Review the successful programs in BC, such as the Whistler Spirit program or the “Ask a Local” program in cities such as Rotterdam. Encourage participation in the new SuperHost Destination Ambassador program. Review the resources of popular ambassador organizations such as BC Ambassador Program. Identify and recruit resident ambassadors and prepare terms of reference. Schedule and sponsor ambassadors to appear at community events. <p>SUCCESS NETWORK DBC, TVI, DMOs, Chambers of Commerce, Local government, go2HR</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p>
<p>28. Strengthen the emphasis on sustainability within the tourism sector</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Explore the opportunity to pursue Biosphere Destination Certification with the Responsible Tourism Institute. The Thompson Okanagan has recently achieved this certification and discussions with TOTA will assist in developing a plan for moving forward. Review the Biosphere Certification criteria and ways of incorporating the criteria into the implementation and monitoring of this strategy. Include a review of TOTA's work on assessing indicators. Encourage businesses to pursue certification through Green Canada Tourism. Develop a Vital Signs report for tourism within the planning area. <p>SUCCESS NETWORK TVI, DBC, DMOs, Chambers of Commerce, Local government</p>	<p>2. LONGER TERM ACTIONS</p>

THEME 4: TECHNOLOGY

THEME 4: TECHNOLOGY	PRIORITY
<p>29. Further develop, enhance and expand the Vancouver Island North trails map and app.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Investigate expanding the geographic scope to include all of the North Island, or even Vancouver Island. Promote the map and app to industry to get more buy-in and a greater number of services listed along with the trails and tourism features. Integrate transit and access information to trail heads and staging areas. Create a more responsive downloadable map for use on smartphones. Determine how the maps and app can be integrated with TVI's Tourism Hiking Master Plan. Enquire with OpenDataBC to see if they might be willing to support enhanced app development. Contact the provincial Open Data Initiative and propose the development of a pilot app that makes better use of government data sets. <p>SUCCESS NETWORK Vancouver Island North, TVI, DMOs, OpenDataBC, DataBC</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>
<p>30. Develop a tourism technology strategy for Vancouver Island that would prioritize development efforts.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Focus on bringing together the research on trends and best practices, and provide recommendations on which functions offer the greatest potential benefit to the North Island, and which specific opportunities might be brought forward. A basic typology would include simple information, two-way sharing (e.g., social media), context awareness (e.g., maps) or Internet-of-Things (e.g., real time ferry information). The consultation process identified transportation and trail/mapping information as systemic gaps. Identify local examples of innovative use of technology in tourism, which can then be showcased to industry and communities. Consider a tourism technology forum that would bring together local businesses from the two industries for the express purpose of identifying opportunities for technology transfer and adoption. Investigate Smart Tourism Destination concepts and whether they would have application in the study area. <p>SUCCESS NETWORK TVI, Technology and research providers, Educational institutions, Chambers of Commerce, Local Government, DMOs</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>31. Develop a performance measurement framework that can be used to evaluate the Destination Development Strategy and help communities track progress on tourism</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Meet with DMOs and economic development offices to determine how they are currently measuring performance. Prepare a simple logic model that can be used to organize the metrics and indicators, and identify sources of information to benchmark and measure change. <p>SUCCESS NETWORK Local government, Economic development offices, DMOs, TVI, TOTA</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>

THEME 5: INDUSTRY DEVELOPMENT

THEME 5: INDUSTRY DEVELOPMENT	PRIORITY
<p>32. Enhance enterprise facilitation services by local government and economic development agencies.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Create a tourism business visitation program aimed at retaining and expanding the number of market-ready experiences. A Business Retention and Expansion (BRE) program is meant to highlight current trends, opportunities and red flags as they affect tourism development. Operators would be surveyed as part of a six-month pilot of visitation and outreach, data collection, and aftercare. Build on existing models, such as Comox Valley Economic Development Society's business visitation and entrepreneurship program, and explore ways of expanding their Small Business Week capacity building initiative. The Economic Development Association of BC has additional BRE program resources. • Develop an aftercare service focusing on operators who have participated in the Remarkable Experiences program. Work with local economic development offices and DMOs for their support and participation in the program. • Promote tax incentives and reduction of red tape policies to encourage the development of tourism businesses in downtown areas. <p>SUCCESS NETWORK Local government, VIEA, Economic development offices, Tourism operators, Island Coastal Economic Trust, Community Futures , TVI</p>	<p>2. LONGER TERM ACTIONS</p>
<p>33. Promote increased tourism capacity amongst educational institutions.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with Vancouver Island University to reinstitute and fill the Endowed Chair in Tourism and Sustainable Rural Development. • Ensure this person is able to continue supporting tourism research, advocacy, and innovation on the island. • Work with local government to advocate for increased student funding for North Island College from the Ministry of Advanced Education, Skills and Training based on an equitable funding model. <p>SUCCESS NETWORK Vancouver Island University, North Island College, TIABC, WTA, ITBC, VIEA, AEST</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>34. Formulate legacy services to enhance the Remarkable Experiences program.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with local DMOs to deliver Remarkable Experiences in smaller communities to increase outreach and uptake. • Identify sources for a funding pool that can be accessed by local businesses who might not have the resources to participate in the program. • Provide direction on how businesses can build on their Remarkable Experiences attendance by accessing business planning services. <p>SUCCESS NETWORK DBC, DMOs, ITBC, Community Futures, VIEA, Economic Development Offices, Chambers of Commerce, BDC</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>

THEME 5: INDUSTRY DEVELOPMENT	PRIORITY
<p>35. Support expansion of training programs and tourism career planning for Indigenous peoples.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Support additional funding from the Ministry of Advanced Education, Skills and Training for the continuation of the Aboriginal Eco-tourism program at Vancouver Island University. • Work with First Nations to build in more tourism training programs into impact benefit agreements negotiated with major industry. The K'awat'si Economic Development Corporation has been successful using forestry industry contributions for tourism training that is accessible and attractive to Indigenous youth and workers. Support Gwa'sala-'Nakwaxda'wx Nation's plan to direct students into career pathways, coordinated with Community Futures, and encourage opportunities to expand on this approach. • Promote the development of tourism career preparation and pathway agreements that are in place in Port McNeill and Port Hardy within other communities. • Work with local First Nations and education institutions on tourism career information that appeals to Indigenous youth. • Review the Rivers, Ocean and Mountain School (ROAMS), an outdoor leadership school based in Parksville and developed in partnership between School District 69 and North Island College, to see if a similar or partnered program might be viable in North Island. <p>SUCCESS NETWORK First Nations, ITBC, School Districts, North Island College, Vancouver Island University, go2HR, K'awat'si Economic Development Corporation, Community Futures, AEST</p>	<p>2. LONGER TERM ACTIONS</p>
<p>36. Work with industry to expand delivery and increase uptake of tourism training programs.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work collaboratively and communicate with colleges and private educators to define industry training needs, including addressing the need for better skills development, cross-training for seasonal jobs, and other labour supply issues. • Consider establishing a tourism education and training advisory committee that could provide recommendations and be a sounding board for training issues and requirements. • Assist tourism operators in accessing information on training programs, opportunities, best practices, advocacy, and other labour supply issues. <p>SUCCESS NETWORK Tourism operators, School Districts, North Island College, Vancouver Island University, go2HR</p>	<p>2. LONGER TERM ACTIONS</p>
<p>37. Investigate the feasibility of a tourism mentorship program on the North Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Utilize the influx of skilled workers and retirees who have moved to Vancouver Island for its affordability and lifestyle, and see if they could form the basis of a mentorship and business development resource program. They could act not only as mentors but also as ambassadors, volunteers, storytellers, knowledge keepers, and advisors. • Investigate the mentorship program delivered by the Comox Valley Economic Development Society and see if this might be expanded for tourism throughout the North Island. <p>SUCCESS NETWORK go2HR, Economic development offices, VIEA, Community Futures</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p>
<p>38. Promote the adoption of certification standards for tourism employees.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with post-secondary institutions on industry standards, the identification of education opportunities for individuals as well as operators, and an outline of cost considerations (e.g., the business case for achieving certification standards). • Encourage industry participation in certification programs, offering more co-op and apprenticeship opportunities. Provide a realistic baseline understanding for new labour force entrants on expected job conditions and demands. <p>SUCCESS NETWORK go2HR, Economic development offices, VIEA, Community Futures, Vancouver Island University, North Island College</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>REGIONAL SCOPE</p>

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT	PRIORITY
<p>39. Organize a study tour of best practice tourism destinations for local government, DMOs, and industry leaders.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Undertake research of other similar tours conducted by BC communities, focusing on jurisdictions that have comparable assets or challenges to North Island. The Thompson Okanagan Tourism Association has swapped DMO staff with Australia, while Tofino has hosted or sent delegations to Gros Morne, Whitehorse, and Norway. The Northern Rockies Alaska Highway Tourism Association hosted several BC communities on a road-trip of the Alaska Highway from Dawson Creek to Anchorage. • Prepare terms of reference for a tour focusing on best practices in outdoor recreation, wildlife viewing, carrying capacity, and environmental management, and First Nations partnerships. Costs, funding, and other logistics can be outlined in the terms. • Recruit interested communities. <p>SUCCESS NETWORK TVI, DMOs, VIEA, First Nations, ITBC, Chambers of Commerce, Vancouver Island University, North Island College</p>	<p>3. SET ASIDE UNTIL RESOURCES ALLOW</p> <p>REGIONAL SCOPE</p>
<p>40. Continue to evaluate and position visitor services so they are able to promote and facilitate connections to North Island experiences and communities.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Examine the opportunities for the use of local government technology resources in tourism. For example, local government has expanding GIS capabilities and at the same time is responsible for managing urban and remote trail systems for both residents and visitors. Consider whether this technology can be leveraged to enhance visitor services, and create more integrated and interesting experiences. A specific best practices guide could be assembled and distributed to local government to encourage discussion and identify potential projects. • Provide better information to visitors on transportation restrictions on logging roads, the condition of gravel roads, issues with following back roads on Google maps, safety considerations, and signage standards. • Identify ways to reach highway travellers with local visitor services. Currently, visitor centres north of Courtenay are off-highway and many travellers do not have an opportunity to seek out travel counsellors and personalized information. Tourism Tofino's VW microbus serves as a mobile adjunct to the Cox Bay Visitor Centre. • Continue to develop Visitor Centre capacity to expand outreach through: <ul style="list-style-type: none"> - Social media and other online communications. - Expanded media partnerships such as those being implemented by the Campbell River Visitor Centre where a private partner is outfitting high traffic and high visibility sites with TV screens promoting specials for accommodation, tours, and real time solutions to visitor services. This is particularly valuable for sport tourism visitors and the Visiting Friends and Relatives segment. - Monitoring emerging trends in delivery from Destination BC and TVI. <p>SUCCESS NETWORK DBC, TVI, Innovation Island, Local government, DMOs, Chambers of Commerce</p>	<p>1. QUICK WINS</p>
<p>41. Develop new winter experiences to increase visitation in the off and shoulder seasons.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Work with accommodators in Port Hardy, Port McNeill, and the Comox Valley to develop packages around the mountain play areas — Mount Cain and Mount Washington. • Encourage operators to offer more winter activities, including new day tours. • Encourage communities to consider more fall, winter, and spring festivals outside the peak visitor season. • Work with First Nations on developing winter experiences. <p>SUCCESS NETWORK TVI, DMOs, Economic Development Offices, Community Futures, VIEA, ICET</p>	<p>2. LONGER TERM ACTIONS</p>

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT	PRIORITY
<p>42. Encourage more excursions and day tours so visitors have more activity choices when travelling through the planning area.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Identify day tours for nature observation, sight-seeing, and experiencing downtowns, local history and culture that will appeal to highway travellers, bus tour visitors, and cruise ship visitors. Develop packaged resources that will appeal to, and be marketed to, tour operators who are looking for hands-on, locally-sourced experiences. Examine the feasibility of developing a geo-caching experience on the North Island that takes advantage of local history, culture, and industry. <p>SUCCESS NETWORK TVI, DMOs, Economic Development Offices, Community Futures, VIEA, ICET</p>	<p>2. LONGER TERM ACTIONS</p>
<p>43. Develop more experiences linked to the pending accreditation of the world's first Whale Heritage Site on Vancouver Island North.</p> <p>The Whale Heritage Site, designated by the World Cetacean Alliance, would be the first in the world and has the opportunity to be a first mover on experience development</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Work with the North Island Marine Mammal Stewardship Society and associated tour operators on a WHS tourism strategy that would blend Indigenous experiences, edu-tourism, wildlife viewing, and interpretation. <p>SUCCESS NETWORK North Island Marine Mammal, Stewardship Association, TVI, ITBC, First Nations</p>	<p>1. QUICK WINS</p>
<p>44. Work with First Nations and ITBC to encourage more Indigenous experiences.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Establish an Indigenous Tourism Committee that would focus on policy development and programming for product and service development, and appoint an ITBC indigenous tourism specialist to work from the TVI office.¹⁰ Engage First Nations on how to build a stronger success network, and increase participation in tourism planning across all levels. Using the Vancouver Island Regional Aboriginal Tourism Strategy (2014) as a baseline, identify, in cooperation with ITBC, short term initiatives for creating market-ready experiences. Investigate an Indigenous mentorship program in which small tourism operators can gain access to the experience and expertise of mainstream tourism businesses.¹¹ Evaluate existing packaging efforts (e.g., Indigenous Tourism BC's Whales, Bears, Cities, and First Nations Culture, Tourism Association of Vancouver Island's Cultural and Creative Coast) and recommend improvements based on EQ profile preferences. Develop a guidebook to help local operators integrate Indigenous culture and themes into their products, preferably through partnerships with local First Nations. <p>SUCCESS NETWORK ITBC, VIEA, Economic development offices, Local government, TVI</p>	<p>1. QUICK WINS</p> <p>REGIONAL SCOPE</p>

¹⁰Looking at the Thompson Okanagan Tourism Association's work through the ITBC regional "Indigenous Tourism Specialist", there has been a marked increase in First Nations involvement in destination development projects within the region and a more defined role for Aboriginal operators in the participation of the Indigenous Tourism Association of British Columbia's Next Phase plans

¹¹A mentorship program can make a significant impact, as has been demonstrated on the mainland coast with the growth of the Homalco Band's bear viewing operation following mentor assistance. The regional ITBC strategy for 2014 identifies opportunities and gaps, but it does not indicate how these might be moved forward at the destination or business. A mentorship program would provide direct enterprise facilitation services that are lacking for First Nations entrepreneurs.

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT

PRIORITY

45. Increase the touring appeal of rural and island communities, which target EQ segments that have a high interest level in visiting, providing enhanced services.

1. QUICK WINS

ACTIONS

- Focus on building tourism capacity of tourism stakeholders in Winter Harbour, Fair Harbour, Coal Harbour, Woss, Zeballos, Tahsis, Gold River, and Sayward. A rural tourism advisory committee should be considered and tasked with both supply and demand side initiatives. To create real results, obstacles to demand such as poor marketing and promotion, and limited coordination among tourism stakeholders will need to be simultaneously addressed.
- Develop more interpretation around geotourism and heritage tourism:
 - An inventory of features and sites that could be combined in self-guided and guided tour packages is recommended. The cave and karst asset is untapped on the west coast except for caving enthusiasts, despite there being a high level of interest in geotourism by touring markets.
 - Greater access to the culture and history of Nootka Sound is highly recommended. A pre-feasibility study of an interpretive centre in Tahsis or Gold River, hosted by the Mowachah/Muchalaht First Nation should be undertaken, and input from Parks Canada on interpretive potential sought. The Nootka Sound Incident, Nootka Conventions, and the role of Chief Maquinna in each is virtually unknown to visitors despite being of international significance.
- Explore the opportunity to develop niche experiences on islands, such as the Discovery Islands, in a way that is sustainable and does not disrupt the balance of the islands.
- Build on the growth of cyclotourism and support the Comox Valley Cycling Coalition in their efforts to develop this niche sector. Explore ways of extending this work beyond the Comox Valley in a way that widens the competitive appeal of the North Island for cyclotourism.

SUCCESS NETWORK Parks Canada, Local government, Chambers of Commerce, First Nations, ITC, Tourism operators, Accommodators

46. Increase outdoor adventure experiences.

1. QUICK WINS

ACTIONS

- Monitor the provincial land and resource management process and continue to advocate for tourism interests. Resource road policies, visual quality objectives, and resource extraction activities continue to have potentially adverse effects on tourism values.
- Promote the development of backcountry outdoor recreation opportunities and encourage greater operator uptake of Crown tenures as provided in the provincial Adventure Tourism Policy.
- Identify infrastructure and service priorities that will support nature-based activities:
 - Hut-to-hut development is something already contemplated by TVI as part of the Hiking Master Plan. A development model similar to the Sunshine Coast Trail would bring more destination trail visitors to the planning area. Agreements with local recreationists and stewards for managing costs/revenues, use levels, maintenance, safety, and carrying capacity would be necessary.
 - The benefits of and interest in wildlife viewing sites, including land-based whale watching, bear watching, birding, and other opportunities have been relatively well documented, but supporting infrastructure such as viewing platforms is lacking.
 - Promote the development of shuttle services to major use areas/sites so visitors without their own vehicle have access.

SUCCESS NETWORK TVI, Tourism operators, Island Coastal Economic Trust, Recreation groups, WTA, FLNR, TAC, BC Parks (Parks Advisory Committee)

THEME 6: PRODUCT AND EXPERIENCE DEVELOPMENT	PRIORITY
<p>47. Increase arts and cultural heritage experiences.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Build stronger linkages between the community museums within the planning area, and develop interpretive materials that present the various elements of the North Island story, where these elements can best be explored. In Comox Valley, for example, distinctive themes are covered in the Courtenay & District Museum and Paleontology Centre with its famous elasmosaurus exhibit and in the Comox Air Force Museum, while the Whale Interpretive Centre has yet another very distinctive North Island theme. • Explore the feasibility of expanding the North Island Festival of the Performing Arts from its base in Comox to include satellite programs and performances throughout the North Island. • Identify infrastructure and service priorities that will support major events, including events-related transportation shuttle services. • Develop cultural walking tours in each community using a consistent approach that will increase visitors' awareness and interest in the product. • Encourage the development of new and support existing local area enhancement programs for key gathering places, such as town or village centres and waterfront areas, and encourage local governments to develop façade improvement programs similar to the program offered by the Downtown Courtenay Business Improvement Association. <p>SUCCESS NETWORK TVI, Tourism operators, Island Coastal Economic Trust, Community museums, Business area improvement associations, TAC</p>	<p>1. QUICK WINS</p>

9

IMPLEMENTATION FRAMEWORK

SEYMOUR NARROWS
Photo: Boomer Jerritt

A. CATALYST PROJECTS

The following nine actions were identified as priority catalyst projects to move the North Island Destination Development Strategy into implementation:

TOP PRIORITY CATALYST PROJECTS

- Develop a Vancouver Island Transportation Plan, with a section on addressing the distinct challenges of moving visitors around the North Island.
- Develop an evaluation model through which boat launches, docks, marinas, and other marine infrastructure and amenities can be listed and prioritized.
- Advocate for more user-friendly and accessible cycling destinations on the North Island.
- Identify exceptional trails on the north coast to complement and enhance TVI's Hiking Master Plan.
- Encourage BC Parks to undertake new management plans for select parks in the planning area that incorporate a much higher profile tourism mandate and management direction.
- Develop a tourism technology strategy for Vancouver Island that would prioritize development efforts.
- Investigate the feasibility of a tourism mentorship program on the North Island.
- Develop new winter experiences to increase visitation in the off and shoulder seasons.
- Develop more experiences linked to the pending accreditation of the world's first Whale Heritage Site on Vancouver Island North.

B. PROVINCIAL AND REGIONAL PRIORITIES

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

This North Island Destination Development Strategy, together with the other 19 strategies from around the province, will inform the single Provincial Destination Development Strategy.

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

It is recommended the following planning area objectives and actions become provincial initiatives within the Provincial Destination Development Strategy:

OBJECTIVES	PRIORITY
THEME 1: Tourism Infrastructure	
4 Develop a Vancouver Island Transportation Plan, with a section on addressing the distinct challenges of moving visitors around the North Island.	2
2 Develop a business case for coordinating more air connections to the North Island.	1
5 Develop an evaluation model through which boat launches, docks, marinas, and other marine infrastructure and amenities can be listed and prioritized.	1
6 Prepare a Boating Development Guide to help local government with developing infrastructure and services that will extract more value out of visiting boaters.	2
8 Develop a BC Ferries communications and advocacy strategy.	1
12 Improve cellular, broadband and wi-fi services on the North Island.	2
THEME 2: Trails and Crown land access	
14 Identify exceptional trails on the north coast to complement and enhance TVI's Hiking Master Plan.	1
15 Encourage BC Parks to undertake new management plans for select parks in the planning area that incorporate a much higher profile tourism mandate and management direction.	2
18 Develop a consistent trail sustainability program that maintains the current quality of experience while diverting use to under-utilized trails.	3
20 Catalogue, curate, and promote interpretive resources linked to the trail systems to stimulate visitor interest and awareness of local culture.	2
21 Build a better baseline that will assist future development of a marine trail product on the North Island.	3

OBJECTIVES	PRIORITY
THEME 3: Collaboration	
22 Create a mechanism to implement, monitor, and follow up on the Destination Development Strategy.	1
23 Prepare a Value of Tourism study for the North Island.	2
25 Closely review the implementation of the North Vancouver Island Marine Plan and work through the partnership to protect the integrity of marine and near-shore cultural and heritage resources.	2
THEME 4: Technology	
29 Further develop, enhance, and expand the Vancouver Island North trails map and app.	1
30 Develop a tourism technology strategy for Vancouver Island that would prioritize development efforts.	2
31 Develop a performance measurement framework that can be used to evaluate the Destination Development Strategy and help communities track progress on tourism.	1
THEME 5: Industry development	
33 Promote increased tourism capacity amongst educational institutions.	1
34 Formulate legacy services to enhance the Remarkable Experiences program.	2
38 Promote the adoption of certification standards for tourism employees.	1
THEME 6: Product and experience development	
39 Organize a study tour of best practice tourism destinations for local government, DMOs, and industry leaders.	3
44 Work with First Nations and ITBC to encourage more Indigenous experiences.	1

It is recommended the following planning area objectives and actions become regional initiatives within the Regional Destination Development Strategy:

OBJECTIVES	PRIORITY
THEME 1: Tourism Infrastructure	
11 Support local government housing initiatives that address worker and visitor housing and accommodation options.	1
THEME 2: Trails and Crown land access	
17 Update the Vancouver Island Land Use Plan and improve its relevance to tourism.	1
19 Promote a consistent, cohesive and acknowledged backcountry stewardship policy.	3
THEME 3: Collaboration	
24 Encourage all ministries and Crown corporations that have the potential to influence tourism, state their role in tourism as an economic development priority.	2
THEME 4: Technology	
THEME 5: Industry development	
THEME 6: Product and experience development	

C. FUNDING PROGRAMS

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

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

Contact Destination BC for a copy of this information sheet.

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

Funding options also include:

- Island Coastal Economic Trust

MEASURING AND MONITORING SUCCESS

MOUNT WASHINGTON
ALPINE RESORT

Photo: Mount Washington Alpine resort

The overall objective of this strategy is to help guide the growth of the planning area's tourism sector in an economically, socially, and environmentally sustainable manner over the next 10 years. The following recommended measurements can be used to monitor the success of the tourism industry in the North Island, and the implementation of this plan.

GOAL	PERFORMANCE MEASURES	SOURCES
1. Develop distinctive experiences with a high level of market appeal	<ul style="list-style-type: none"> • Net Promoter Score¹² • Number of new or strengthened experiences 	<ul style="list-style-type: none"> • Consumer survey • Tourism partners survey – tourism businesses
2. Build a year-round visitor economy	<ul style="list-style-type: none"> • Growth in MRDT revenues • Increase in overnight stays • Economic Impact • Adoption of sustainability programs and achievement of certification 	<ul style="list-style-type: none"> • Ministry of Finance • Accommodation Tracking • Destination BC's Value of Tourism model¹³ • Internal data base
3. Disperse the benefits of tourism throughout the North Island	<ul style="list-style-type: none"> • Ratings of business climate • Ratings of improvements in tourism industry • Ratings of ease of transportation • Support for tourism 	<ul style="list-style-type: none"> • Tourism partners survey – tourism businesses • Tourism partners survey – all tourism partners • Consumer survey • Resident survey

¹²Net Promoter Score calculation: www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx

¹³Destination BC's Value of Tourism model: www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Value-of-Tourism-Model.aspx

APPENDIX

APPENDIX 1: PLANNING CONSIDERATIONS

This section summarizes the planning context and provides the key directions the North Island Destination Development Plan should address.

On the basis of the desk research and the consultation process, the following planning considerations have been identified for the North Island.

INDUSTRY DEVELOPMENT

a) Labour Market

Labour market constraints are well known in the tourism industry — on the North Island they are amplified and have a chilling effect on investment and experience development outside the peak summer season.

Issues identified in the planning sessions include:

- The low population and lack of growth in recent years has contributed to a shortage of workers in skilled and unskilled tourism positions, something that is exacerbated by competition from other tourism regions. The North Island is not a preferred location for workers with a choice, and recruitment out of the Lower Mainland is especially difficult. The poor availability and high cost of housing and ongoing perceptions of low pay tourism jobs and careers exacerbates the barriers.
- The access to and uptake of education and training programs is poor. For example, tourism operator's use of the SuperHost program is low when it could make a substantial difference in understanding and addressing the gap between industry's view of good services and visitor expectations. The North Island, with its reliance on wilderness recreation, could also improve access to accreditation programs, not just standard hospitality courses delivered by North Island College (NIC).

- The adoption of technology by industry is a partial solution to labour shortages but again access and uptake is not what it could be.
- There are very real issues integrating immigrant business owners into a tourism ethic. This will be a growing problem if succession planning for existing operators and businesses has to rely on immigrant capital for viability.

Some progress is being made on the labour market front, for example in the case of the forest academy in Woss that is being managed by the Regional District of Mount Waddington Workplace and Action Planning Committee. Adventure tourism educators are also exchanging ideas about product development training, something that is informal now but could be more formalized in the future. The Aboriginal Ecotourism Training Program, a partnership of Vancouver Island University (VIU), NIC, ITBC, and the Heiltsuk Tribal Council is seeking funding to extend this successful effort at increasing participation of Indigenous people in the tourism labour market.

b) Enterprise Facilitation

Enterprise facilitation refers to resources and services available to help small and medium-size businesses be market-ready, export-ready and ultimately more competitive. As discussed at the planning workshops, the following issues are considered problematic in the planning area:

- Many operators in the North Island planning area do not have the expertise or resources to support business expansion or the development of more product and experiences. They generally work in isolation, and while more often than not they are expert in one or more aspects of their operations, they may fall short on management, marketing or financial capacity. The lack of export-ready product can be attributed to the unfamiliarity of working with the travel trade.
- Succession planning is a particular concern, as existing businesses owners retire and must face closing shop rather than cashing out on a successful business. The small economic base and lack of growth leaves few local entrepreneurs who are available and willing to step up and fill the void, while the noted lack of younger operators mean there is a gap where smaller, younger companies take over from their more established competitors.
- It was also noted that many operators themselves resist developing year-round businesses for lifestyle issues. This paradoxically contributes to difficulties in succession where potential investors are more interested in financial viability rather than lifestyle.
- The above points are all compounded by access to support services in the planning area. Access to capital is very limited owing to the lack of local sources, and to the low or seasonally fluctuating cash flows that make conventional financing difficult. New businesses and concepts are very hard to get off the ground unless the entrepreneur is already plugged into local networks. For any opportunity requiring access to and use of the Crown land base, the permitting and tenuring procedures can be exhausting and costly. Finally, local research (e.g., visitor numbers, spending estimates) that can be used to build a business and financial plan is in short supply and often makes the planning process more guesswork than science.

The above notwithstanding, there are some enterprise resources available to tourism operators. Community Futures, for example, provides small business loan funds and succession planning tools, while economic development offices can provide guidance on business retention, development and investment attraction. The demand for these services, however, outstrips supply and many operators simply are not aware of local resources, even if they are available.

c) Tourism Advocacy

As with most regions of the province, the understanding of the value of tourism is poor, which has an unintended consequence of impeding investment and development. It is not taken seriously as an industry even though it is considered an economic base (e.g., export) sector that generates community wealth. The fact that many different businesses, for example in transportation, retail, personal services and even hospitality, do not perceive themselves as being involved in tourism is symptomatic of this issue.

Discussion at the workshops noted the lack of a tourism voice whether that be among local government or at the senior government levels. This is partly attributable to the small business orientation of the industry which means it has little bargaining power compared to industries such as forestry and mining that are dominated by big business.

Communicating rural and wilderness tourism needs and opportunities to urban policy makers and decision-makers can be frustrating as well. In its day the Vancouver Island Land Use Plan (VILUP) was a model for land and resource management planning on Crown land, but the document is now several decades old and has yet to be updated.

d) Industry Collaboration

Greater collaboration among tourism operators, Indigenous peoples, government, and communities in the North Island planning area is needed. Workshop participants offered the following considerations regarding building regional synergies and leveraging scarce resources for more effective destination development:

- Overcoming the competition versus collaboration dilemma among operators and communities.
- Low levels of industry collaboration and networking on strategic industry development measures.
- Lack of protocol agreements between tourism operators, Indigenous people, and with resource industries.
- Insufficient communication and trust between local government and Indigenous communities.
- Insufficient awareness of experiences and products and what they actually mean from the visitor perspective.
- No cohesive, overarching brand that can get the overall buy-in from communities and operators.

Although more needs to be done, it is worth noting that some progress is being made. For example, Destination BC will be doing a mountain biking destination marketing campaign focusing on women and families which will involve the rapidly evolving mountain biking experience in Cumberland and Campbell River. A globally recognized and accredited Whale Heritage Site is in the advanced planning stage for the North Island planning area. It will be the first of its kind in the world and will provide opportunities for responsible marine mammal viewing, education, research, and cultural development.

POLICY

Workshop discussion about broad policy issues generated three issues of note:

- There is a need to think outside the box on land use planning and policy, and orientate it toward the future rather than simply reflecting the past. The inability of communities and the tourism industry to actually influence provincial and federal policy contributes to this lack of alignment.
- There is a lack of appropriate data and information available for sound policy development. This is particularly noticeable on some management issues, such as the preservation of wildlife and fishing stocks, that are extremely important to the North Island.
- For tourism operators, navigating the maze of existing policies and guidelines can be intimidating and potentially harmful (e.g., in terms of health and safety issues).

a) Transportation

Transportation policy issues in the North Island planning area are relatively similar to those elsewhere on the island, namely:

- Supporting the movement of people and goods between and within communities.
- Updating TRAN highway policies that inadequately acknowledge needs of tourism businesses.
- Greater support for air policy and access.
- The need for stronger partnerships with BC Ferries.
- The jurisdictional and policy failure for dealing with derelict vessels and divestiture of marine infrastructure.

b) Private and Crown Land Access

Land use and access in the planning area is complicated by the wide areas of private lands in the Comox/Strathcona region. This means that coordinating development, upkeep and use of trails and corridors can be especially challenging. The commercial use of Crown land for tourism operators in terms of obtaining tenure and dealing with the management issues in multiple use areas also presents challenges. An example of the latter would be road closures that are not subject to a referral process or take into consideration impacts on all users.

c) Inter-Ministry Support for Tourism

Workshop participants indicated that the land and resource ministries did not provide much policy support for tourism because it has not traditionally been viewed as a resource industry. There are few direct references to tourism in land use legislation, and ministries are not bound to support provincial brands such as Super, Natural British Columbia. Even BC Parks management planning is out of date and rarely plan for tourism (versus environment and recreation) values. Other problem areas include the perceived lack of compliance and enforcement of existing policies with regard to timber harvesting and visual quality objectives. There are minimal penalties for violating the latter.

d) Local Government and First Nations

The cooperation between local government and Indigenous communities has come a long way over the last few decades, but greater communication about the reconciliation and treaty processes, understanding of protocols and local partnerships is needed.

e) Sustainability

Workshop participants discussed sustainability from three perspectives, land and resource use, community planning and industry uptake, and adoption of green or sustainability standards. Latter examples include Canada Green tourism certification and industry-led projects like the Whale Heritage Site initiative which binds wildlife viewing companies to best practice industry standards. In terms of land use, some workshop participants noted that the outdated VILUP was in need of a refresh, perhaps along the lines of the Great Bear Rainforest agreement in which FLNR is managing the land according to eco-system based principles on a continuous cycle, as opposed to the static commitments embodied in the VILUP.

INFRASTRUCTURE

a) Accommodation

The accommodation challenges in the North Island planning area occur at both ends of the spectrum, a lack of full-service, high quality facilities at one end, and a shortage of full service camping and RV sites at the other. The need is greater as one moves from the major centres in the south to the smaller communities of Mount Waddington. It was also noted that the state and age of accommodations does not always connect with visitor expectations. There are world-class, five-star resorts in the planning area, for example Nimmo Bay Wilderness Resort, that have clearly shown that the North Island can be packaged and sold to discerning markets worldwide. On another positive note, BC Parks and RSTBC are both investing more in campground facilities.

b) Transportation

Transportation services can differ dramatically in the planning area, particularly with air travel. The Comox Valley is well served with flights to the Lower Mainland and Alberta, but the smaller airports of Mount Waddington are less connected. Connections between the airports, ports, and community centres can also be challenging, in part because transit services do not extend to these points of arrival and departure.

The Inland Island Highway ends in Campbell River, and north to Port Hardy the highway has limited shoulder space and few pullouts. This makes road cycling a safety concern. Safety issues also arise on logging roads which are required thoroughfares for some operators and their guests, even though road conditions are not the best. Concerns regarding logging trucks are set to increase, with the move away from rail transportation for timber to the use of trucks on the northern stretches of Highway 19. In terms of emerging issues, the lack of electric vehicle infrastructure was also noted at the workshops. This may not have a noticeable impact at present, but it certainly will in the future as electric cars increase their share of the market and improved technologies allow these vehicles to travel longer and farther than ever before. Lastly, ferry capacity, scheduling and costs, especially on weekends, remain issues. BC Ferry vessel improvements on the Sointula to Alert Bay route are a positive, as was the re-institution of the Discovery Coast Connector route to the Central Coast.

c) Marine

There are not enough marinas, boat launches, and other marine services, including gas services, in the North Island, again with the severity increasing as one moves further north. Community access to infrastructure funding is scarce which can make it challenging to maintain local docks. These circumstances are holding back the expansion of the coastal cruising sector.

d) Trails

Some trails in the planning area have become highly successful, such as the North Coast Trail and the Cape Scott Trail. The influx of visitors on long weekends can present congestion problems. One solution is better coordination among other trails and trail systems as alternate experiences. However, access to trail information by visitors is limited, as are resources for trail maintenance, and the local steward pool is small. Guided tours, shuttling, and rental services could improve access to and use of other trails and help alleviate carrying capacity concerns. Tourism Vancouver Island's hiking tourism project has led to the creation of a trail inventory and action plan, and working groups have been set up to represent the sub-regions in identifying exceptional trails, mobility accessible trails, amenity improvements, and potential hut-to-hut experiences.

e) Signage

Almost every community and region in the province has identified signage as a gap in tourism planning and the North Island planning area is no different. This applies equally to highways, logging roads, trails, and gateway communities.

f) Telecommunications

Internet and cell coverage on highways and backroads is poor, with very limited cell service and access to wi-fi outside of the major communities. Telus is installing fibre optic cable but access is limited by the high costs of extending service beyond urban areas and the relatively low number of potential subscribers. Wi-fi services are also limited. Gaps in internet coverage impact trip planning by visitors to the planning area and limit the role technology can play in enhancing the experience (e.g., through interactive mapping and games).

VISITOR EXPERIENCE

The visitor experience to the North Island is a varied one. Many travellers are simply using the planning area as a staging area for adventures further up or down the coast — a function of BC Ferries routes and services; while, at the same time a significant number come to the planning area for its destination attractions — particularly the provincial parks and outstanding wilderness features. The concept of the North Island as a remote but accessible wilderness is a compelling one, but apparently that promise is still out of reach for all but the independent, adventurous traveller. More wet weather options, activities outside of the peak summer rush, revitalized community centre, and a greater commitment to community and operator hospitality have all been noted in the above paragraphs.

Other aspects of the visitor experience brought up in the workshops included the following:

- Aligning visitor centres and front-line businesses into a seamless delivery of visitor services, where services are standardized (e.g., Courtenay provides booking services, other visitor centres do not), operating hours extended, and technology is better used to keep up with evolving consumer trends.
- Building more Indigenous experiences, not simply in relation to historical artifacts but as a living culture, and not just in Indigenous communities but as an underlying characteristic of all experiences.
- Helping small communities catch up to the larger centres in product development, perhaps by linking them more closely with Indigenous experiences.
- Interpreting the history and culture of the planning area in ways that make it easier for tourism operators to incorporate into their products and services.
- Expanding access to wilderness experiences through sustainability principles as a brand differentiator.

APPENDIX 2: ALIGNMENT DETAILS — PLANS REVIEWED

Campbell River Strategic Plan 2015–2019	Destination BC Corporate Strategy 2017/18–2019/20.
City of Campbell River Five-Year Tourism Strategy 2016	Destination BC’s 2017 Global Marketing Strategy and Plan.
Comox Valley Art Gallery Strategic Plan 2012–2015	North Vancouver Island Tourism Plan 2015
Comox Valley Regional Economic Development Strategic Plan Update 2013	North Vancouver Island Tourism Plan Update Report July 2011
Comox Valley Economic Development and Tourism Q2 and Q3 2017 Report Summary Highlights	North Vancouver Island Tourism Plan 2008
Comox Valley Economic Development & Tourism Work Plan 2016	Sayward Tourism Plan 2016/17
	Vancouver Island & Coast Region Hiking Tourism Master Plan 2016
	Vancouver Island North Strategic Business Plan 2016–2018

APPENDIX 3: INTERNATIONAL STANDARDS FOR TOURISM DESTINATIONS — BIOSPHERE DESTINATION CERTIFICATION CRITERIA

A. INSTRUMENTS FOR A RESPONSIBLE TOURISM POLICY

- A.1. Responsible tourism policy
- A.2. Plan of action
- A.3. Establishing a responsible functional organization
- A.4. Responsible marketing
- A.5. Monitoring plans for sustainable tourism
- A.6. Prevention of seasonality
- A.7. Legal and regulatory requirements
- A.8. Prevention of climate change
- A.9. Management and control of services and product consumption
- A.10. Visitor safety
- A.11. Involvement and information on the responsible tourism system
- A.12. Quality of the service offered to the visitor
- A.13. Accessibility

B. SOCIAL AND ECONOMIC DEVELOPMENT OF THE DESTINATION AND THE LOCAL COMMUNITY

- B.1. Responsible management in the economic sphere
- B.2. Promotion of the economic and social development of the community
- B.3. Generation of job opportunities in the tourism industry and training
- B.4. Tools for civic participation in tourism and measurement of the satisfaction of the local community.
- B.5. Population access to destination’s resources
- B.6. Policy for the prevention of commercial, sexual or any other kind of exploitation
- B.7. Promotion of the multiplying effect and of fair and/or local trade

C. PRESERVATION AND IMPROVEMENT OF CULTURAL HERITAGE

- C.1. Responsible management in the socio-cultural sphere
- C.2. Plan for the management of visitors and the capacity of the destination
- C.3. Participation in the preservation of cultural resources
- C.4. Promotion of knowledge among visitors
- C.5. Tools to support the development and maintenance of the culture of the destination by tourists
- C.6. Responsible behaviour

D. ENVIRONMENTAL CONSERVATION

- D.1. Landscape protection and environmental impact assessment studies
- D.2. Sustainable transport
- D.3. Natural resources
- D.4. Wildlife protection
- D.5. Energy management and control
- D.6. Water management and control
- D.7. Greenhouse gas emission
- D.8. Light and noise pollution
- D.9. Waste management and control

Full details on each instrument can be found at: www.biospheretourism.com/en/biosphere-destination-standard/23. The Biosphere certification was the first to be approved by the Global Sustainable Tourism Council (GSTC) worldwide, and is the only one to incorporate the UN 17 Sustainable Development Goals and the main guidelines of the Paris Climate Summit.

