

T O U R I S M P L A N - F I N A L

S A Y W A R D

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Plan Summary and Priorities

This Tourism Plan is prepared for Sayward through the [Community Tourism Foundations](#) program (CTF) of [Destination British Columbia](#). Stakeholder consultation consisted of a one-day workshop held on November 27th 2015 in Sayward to review the current situation with regard to local tourism, and to identify opportunities and areas of related action that are capable of gaining traction in the shorter-term. Twenty stakeholders from the community and wider area attended the full-day workshop and the event demonstrated a high level of interest and commitment to growing tourism and to working collaboratively with regional partners.

This report presents the outcome of these deliberations. It outlines the regional context and provides strategic direction for developing a stronger tourism sector in Sayward.

An assessment of trip and market characteristics of visitors to the Campbell River Region, including Sayward, and Vancouver Island North indicate that these regions are overnight destinations for a significant proportion of the visitors. However, many visitors now plan their trip at very short notice and are likely to make unplanned stops. Sayward is well located to leverage this type of spontaneous trip behaviour. The prevalent use of electronic devices in this trip planning is noted, and highlights the need to provide timely and relevant digital information that will help the visitor maximize the experience within the destination.

Regional short-haul markets are important to the tourism economy in the northern regions of Vancouver Island. Having observed that, it is also recognised that the European market is a key summer touring market in the area. Understanding the visitor and what motivates travel is now enhanced through Destination BC's use of Destination Canada's Explorer Quotient® (EQ) tool – a psychographic segmentation tool that looks more closely at the visitors' social and travel values. This tool assists in both product and market development activities and is aligned with the growing emphasis on developing unique and memorable experiences.

Looking at Sayward as a destination, there is a strong local commitment to developing and promoting tourism. The Village of Sayward has established a new Tourism Committee to provide leadership and direction, and tourism is clearly identified as a specific economic objective in the community's Official Community Plan (OCP). The economic development strategy of 2013 builds on the OCP and provides the broad context for tourism development as part of the wider economy. Recent initiatives, including major Provincial infrastructural projects on the highways (the building of cycle lanes and the possibility of new passing lanes) and the current work on the marina at Kelsey Bay have improved the competitive appeal of Sayward. A more detailed SWOT analysis highlights the strengths and opportunities that can be leveraged, and the weaknesses and threats that need to be addressed, or at least taken into consideration in planning the growth of tourism.

In looking ahead the workshop attendees outlined their key aspirations for tourism which have been captured in the following vision statement:

By 2020 Sayward will be a vibrant coastal community visitor destination, well known for its readily accessible array of land and water-based experiences and adventure, local village events and cultural

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heritage – developed and promoted by a cohesive tourism industry within the supportive framework of a collaborative regional structure.

The Action Plan is short-term in its implementation timeline and recognises that resources are limited. It is designed to focus on actions that will make a difference in the coming 18 to 24 months and emphasises the need to develop a strong internal understanding of Sayward’s assets and how these can be utilized more effectively to provide unique and appealing experiences for today’s markets.

The Plan identifies 20 tactics in five areas:

1. Moving forward with existing community and related economic development and infrastructure initiatives;
2. Building a collaborative approach and a stronger community business model to developing tourism within a regional framework;
3. Exploring opportunities for product and visitor experience development on an ongoing basis;
4. Developing a stronger destination identity online and offline; and
5. Encouraging the development of strong leadership through the Tourism Committee.

The following table represents a summary of the key actions. The main text provides further detail and, in many cases, the rationale for the specified actions.

SUMMARY: SAYWARD TOURISM PLAN UPDATE 2016-2017	
STRATEGIC PRIORITIES	ACTIONS (abbreviated)
<p>Moving forward with existing community and related economic development and infrastructure initiatives</p>	<ol style="list-style-type: none"> 1. Continue the current partnership efforts with Strathcona Regional District to improve highway signage and increase the visibility of Sayward as a destination for passing traffic. 2. Continue to pursue completion of the cell tower project. 3. Continue the current efforts to encourage and incentivise the development of new commercial services. <ol style="list-style-type: none"> a) Work collaboratively to develop an investment strategy that will attract new businesses, including accommodation services. <ol style="list-style-type: none"> i. This will require building a strong understanding of current visitor levels and preparing a preliminary feasibility analysis as part of an investment portfolio. ii. In developing an investment prospectus, identify the opportunity to establish a business that includes providing a range of rental services to meet emerging needs of visitors. iii. Enhance and upgrade the municipal campground. 4. The recently revived Sayward Futures should continue to identify practices that will assist in revitalizing existing businesses and building a stronger internal business community. Other initiatives include: <ol style="list-style-type: none"> a) Providing networking opportunities for local tourism businesses and encouraging participation in regional tourism networking.

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SUMMARY: SAYWARD TOURISM PLAN UPDATE 2016-2017	
STRATEGIC PRIORITIES	ACTIONS (abbreviated)
	<ul style="list-style-type: none"> b) Participation in TVI events, including training events and the Annual AGM and Tourism Conference.
<p>Building a collaborative approach and a stronger community business model to developing tourism within a regional framework</p>	<ul style="list-style-type: none"> 5. Explore and develop the opportunity to work with Campbell River in the context of the new regional model that is likely to be established in the near future. <ul style="list-style-type: none"> a) Create awareness within the accommodation sector of the MRDT program as a means of creating new funds for marketing and explore the interest and feasibility of introducing this program in association with Campbell River. 6. Give consideration to identifying ways of generating other sources of revenue. In addition to the MRDT, potential options to be explored include: <ul style="list-style-type: none"> a) The development of a ‘pay-to-play’ program where marketing and promotional opportunities for Sayward are identified and tourism operators are offered the opportunity to partner on an initiative. b) A membership-based model. c) The implementation of a tourism levy. d) A destination marketing fee – in theory this could be applied to a range of business operations. e) A combination of options. <p>The development of a business plan will be required for whatever option is pursued.</p> 7. Organize familiarization tours for regional Visitor Centre staff. 8. Develop a mechanism and content for a regular news update that is specific to tourism operators. <ul style="list-style-type: none"> a) Work toward establishing an understanding of the significance of tourism within the wider community. 9. Work collaboratively to identify and pursue emerging grant opportunities.
<p>Exploring opportunities for product and visitor experience development on an ongoing basis</p>	<ul style="list-style-type: none"> 10. Maintain a focus on trails as the basis on new experiences. <ul style="list-style-type: none"> a) Collaborate with TVI on the regional trails strategy for Vancouver Island and the Sunshine Coast, initially by reviewing the Campbell River and region database and highlighting gaps that relate to the Sayward area. Ensure that the information relating to the primary trails has been fully captured. b) Participate in the forthcoming regional workshop and/or stakeholder consultation for Phase 2 of the project. There are a range of variables to be discussed which will benefit from advance discussion – see main text. c) Undertake wider community dialogue on trails to fully assess all related tourism opportunities and management needs. <ul style="list-style-type: none"> i. Build the community’s inventory of trails; ii. Identify signage needs;

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SUMMARY: SAYWARD TOURISM PLAN UPDATE 2016-2017	
STRATEGIC PRIORITIES	ACTIONS (abbreviated)
	<ul style="list-style-type: none"> iii. Identify ways of enhancing the experience through mapping, interpretation and new ways of telling stories related to the trails; iv. Prepare mini-project plans to be ready on a preliminary basis as shovel-ready projects; v. Maintain a search and an awareness of forthcoming grant and funding opportunities. <p>d) Explore ways of leveraging Sayward’s association with the Sayward Forest Canoe Route and the Salmon Brewster Equine Trail Corridor – e.g. through discussions with the Back Country Horsemen of British Columbia and TVI.</p> <p>11. Build on the iconic annual Kusam Klimb event through strengthening the regional messaging and linkages with the community.</p> <p>12. Continue to explore innovative ways of capitalizing on existing strengths and assets. Examples include:</p> <ul style="list-style-type: none"> • Evening storytelling around a fire-pit; • Seafood barbeque on the beach with indigenous menu; • Organized interpretive tours of York Island; • Packaged experiences that include local tasting experiences enhanced through interpretation and story-telling; • Walking tours of Kusum Ghost Town developed in collaboration with the K’ómoks First Nation; • Guided walk of the old trees; • The development of excursions that included picnic lunches profiling local foods created by local business operators; • Cycle rental services and the promotion/development of cycling itineraries from Campbell River; • Itineraries that include the Saturday market; • Kayaking in the estuary; • Walking tour of gardens and promoting of the ‘boom boat ballet’; • Packages that include adventure (climbing H’kusam Mountain) combined with opportunities to interact with locals in the evening. <p>13. Identify stories and themes (in an inventory) that will resonate with the visitor and explore how they might be used in developing new or enriching existing experiences and interpretative materials.</p> <p>14. Use existing events to encourage visitors to stay longer through developing and promoting activities to do on either side of the event.</p>
Developing a stronger	15. It is recommended that the Tourism Committee works with the Village

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SUMMARY: SAYWARD TOURISM PLAN UPDATE 2016-2017	
STRATEGIC PRIORITIES	ACTIONS (abbreviated)
destination identity online and offline	<p>and Sayward Futures to oversee the development of one consolidated visitor-friendly website that links to relevant stakeholders and tourism operators.</p> <ol style="list-style-type: none"> 16. Carefully consider the positioning of Sayward and develop online content that relates to the key experiences and assists the visitors with participating in the outdoor activities, including map assets. 17. Develop a stronger social media presence for Sayward. 18. Develop a digital “things to do in Sayward” page that highlights the community’s top activities. 19. Establish a small working group with specific skills and experience in online marketing to work with the Tourism Committee. 20. Continue to partner with the City of Campbell River and other regional partners, including TVI, in the development of content for regional printed guides.
Encouraging the development of strong leadership through the Tourism Committee	<p>Seek opportunities to build capacity within the Tourism Committee and encourage a partnership-based approach to developing tourism.</p>

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1 Introduction and Strategic Context

1.1 Introduction and Background

This Tourism Plan is prepared for Sayward through the Destination BC [Community Tourism Foundations](#) program (CTF). Stakeholder consultation consisted of a one-day workshop held on November 27th 2015 in Sayward to review the current situation with regard to local tourism, and to identify opportunities and areas of related action that are capable of gaining traction in the shorter-term. Twenty stakeholders from the community and wider area attended the full-day workshop and the event demonstrated a high level of interest and commitment to growing tourism and to working collaboratively with regional partners. The attendee list for the planning session is as follows (as identified on the sign-in sheet):

Mayor John MacDonald	Village of Sayward
Councillor Joyce Ellis	Village of Sayward
Lisa Ramsey	Sayward Futures Society
Becky Terhaar	Sayward Futures Society
Linda Fear	Kelsey Bay RV Campground
Bev Fisher	Tourism Committee
Darren Kiedyk, CAO	Village of Sayward
Eric Borgfjord	Hardwick Transportation
Janet Rainbow	Rainbow's End Gold Course
Mayor Andy Adams	Campbell River
Steve Emery	North Island Kayak
Kathy Lachmann	Economic Development – Ministry of Jobs, Tourism and Skills Training and Minister Responsible for Labour
Joan Magee	Village of Sayward
Charon Rissdale	Tourism Committee
Fran Hoolsema	Tourism Committee
Councillor Jannett Hoare	Village of Sayward
Councillor Norm Kirschner	Village of Sayward
Terry Burnett	Sayward Valley Resort and Elk Haven Cabins
Dave Petryk	Tourism Vancouver Island
Jody Young	Tourism Vancouver Island
Monique Willis	Destination British Columbia

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The workshop program covered the following:

- An overview of the role of Destination British Columbia and Tourism Vancouver Island in supporting and strengthening tourism.
- An assessment of Sayward's internet presence as a tourism destination.
- An envisioning discussion on local tourism by 2020.
- A review of current trends and market expectations, and an assessment of the current tourism situation, including the community's existing market profile, strengths and areas of concern, and recent achievements in relation to tourism to set the context for further discussion of planning opportunities and priorities.
- Scenario discussions to assist with visualising opportunities.
- The identification of specific shorter-term actions for the coming eighteen months to two years.

This report presents the outcome of these deliberations. It outlines the regional context and provides strategic direction for developing a stronger tourism sector. It is designed to be short-term and community oriented in its focus, recognising that this will provide a solid base for engaging in further regional planning as and when Destination BC's forthcoming destination development planning process is undertaken for regions within Vancouver Island and the Sunshine Coast.

The remainder of this section presents an overview of the planning framework. A more detailed account of the value and size of the tourism industry internationally and provincially can be found in Appendix A.

1.2 Provincial Context

In October 2011, the [provincial tourism strategy, *Gaining the Edge*](#) was released as part of *Canada Starts Here: The BC Jobs Plan*. The five-year strategy resulted in a number of key successes for the tourism industry, including the launch of Destination BC in April 2013 (the Crown corporation responsible for marketing British Columbia as a destination to domestic, national and international travellers), and the revitalization of the *Super, Natural British Columbia*TM brand. In September 2015 a refreshed strategy was launched for the period 2015 – 2018 with a strong focus on facilitating greater alignment and efficiencies within the tourism system and across government on programs that relate to the development and marketing of tourism. The Strategy has four specific goals¹:

1. **Leadership through partnership, alignment and coordination:** *“facilitating greater alignment, investments and efficiencies in B.C.’s tourism system to amplify B.C.’s development opportunities and marketing messages.”*
2. **Focused marketing:** *“building on Destination BC’s successful marketing initiatives to compel visitors from key markets.”*
3. **World-class experiences:** *“supporting industry, regions, communities and Aboriginal people to develop or enhance the tourism products and experiences that draw people to our spectacular province.”*

¹ Gaining the Edge: 2015 – 2018 – British Columbia's Tourism Strategy can be reviewed on the Destination BC [website](#).

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4. **Enhancing competitiveness and sustainability:** *“adopting policies and undertaking strategic investments to remove barriers and support tourism growth.”*

Destination BC’s [corporate strategy](#) presents the most recent strategies and tactics with the aspiration to *enrich life by fulfilling dreams, connecting peoples of the world and refreshing the human spirit*, and ultimately become *the most highly recommended destination in North America*. The refreshed brand *built upon BC’s true nature, which is vast, diverse, abundant, awe-inspiring and powerful* has, as its underling essence, the following intent:

To experience BC is to be transformed and renewed. Our promise to travellers is that BC’s powerful nature will bring out the best in each of them².

1.2.1 Community Tourism Foundations Program

The [Community Tourism Foundations](#) (CTF) program provides research, customized destination and marketing assistance and dedicated resources to communities for strengthening their tourism economy. The basis of the current program is a one-day workshop that provides an opportunity for tourism stakeholders to be involved in shaping the direction of future growth and strengthening regional tourism. The **primary output from the workshop is an action plan that focuses on initiatives that can be pursued over the next 18 to 24 months.**

1.2.2 Destination BC Co-operative Marketing Partnerships Program

Access to marketing resources for assistance in implementing a tourism plan is available through the application-based Destination BC Co-operative Marketing Partnerships Program. This program provides co-operative marketing and promotion support to Regional Destination Marketing Organizations, Community Consortiums, Sector Organizations or approved Individual and Paired Communities in British Columbia.

The goals of the program are to increase BC tourism revenues and leverage private and public funds to maximize marketing impact and return on investment for tourism businesses. The purpose of the Destination BC Co-op Marketing Partnerships Program is to enable groups that share common interests and common marketing goals that align with provincial tourism priorities to leverage both private and public funds to achieve greater marketing impact and return on investment (ROI) in driving tourism revenue.

The Destination BC Co-operative Marketing Partnerships Program model is designed around an ‘open pool’ and a ‘reserved pool’ of funds. The ‘open pool’ allows sectors or community consortiums (of three or more communities) to apply for amounts ranging from \$20,000 to a potential maximum of \$250,000, based on available funds and program uptake. Individual or Paired Communities that meet requirements will have the opportunity to apply for to \$7,500 for each community should a consortium opportunity not be available.

All applications will be collectively reviewed and evaluated based on merit, on their ability to generate increased tourism revenue in BC, how they help to build brand equity for the British

² Destination BC, April 2015, [Our Brand](#)

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Columbia Brand, the strength of the Marketing Plan and whether the application has the resources to execute the program effectively³.

1.3 Regional Context

At the regional level, Tourism Vancouver Island (TVI) plays a key role in supporting the development of tourism. As one of five regional destination marketing organizations (RDMO) in BC, Tourism Vancouver Island represents Destination BC through the delivery of cooperative marketing, media campaigns, and community development programs. The RDMO's mission is *to increase the economic benefits that flow from tourism to the Vancouver Island region*. Its activities are aimed at achieving a vision of the Region being *internationally recognized as a preferred travel and getaway destination*. Much of TVI's focus is on ensuring that there is strong consumer awareness and desire to travel to the Vancouver Island region in the primary markets of BC, Alberta and Washington State and, that visitors to the region will be encouraged to stay longer, spend more and return. Building capacity at the local level and assisting tourism businesses in developing and providing tourism experiences and services that will prove to be desirable with the key markets is an important element of this work. Within the primary international markets of United States, United Kingdom, Germany and Australia the emphasis is on working with the travel trade to increase the visibility of Vancouver Island product and working with stakeholders to ensure that product is export-ready. Developing an understanding of these target markets, undertaking research to improve decision making and disseminating research-based market intelligence are integral components to the work of TVI.

At a more local (sub-regional) level, the tourism delivery systems associated with the City of Campbell River and the wider region are under review. Sayward has been affiliated with the regional marketing programs previously undertaken through Campbell River Economic Development Corporation (the former RiverCorp), and interest is high in maintaining this type of partnership and building a more effective way of working together.

³ Further details, and the Program Guidelines, can be found at <http://www.destinationbc.ca/Programs/Regions-Communities-and-Sectors/Destination-BC-Co-op-Marketing-Partnership-Program.aspx>.

2 The Current Situation

2.1 The Rationale for Planning

Undertaking a planning process for tourism in Sayward has a number of distinct benefits, including:

- Providing an opportunity for a range of stakeholders from local government to tourism operators and community organizations to see how tourism can contribute to the local economy and the potential inter-linkages between it and other interests of the community.
- Developing an enhanced appreciation of the area's potential visitor appeal and ways of leveraging local tourism resources and assets.
- Improving the understanding of target markets and market expectations.
- Building a realistic appreciation of what is required to deliver tourism services effectively and to attract the visitor.

To be successful in achieving these benefits there are a series of key questions that need to be addressed in any tourism planning process, and should be reviewed on a regular basis. The questions that were discussed collectively in the workshop include:

1. How does tourism integrate with other community aspirations?
2. What is the current tourism and economic environment?
3. What opportunities and issues is the area facing?
4. Who are the current visitors?
5. What tourism products does the community offer that are of interest to the visitor?
6. What is the collective vision for tourism and what tourism business objectives does the community expect to achieve?
7. What action is required to make the area's current and potential products of greater interest to the visitor?
8. What processes are being used and should be used to communicate with existing and potential visitors?
9. Who will do what?

2.2 The Visitor Profile

2.2.1 Regional market characteristics

Understanding the current visitors and their trip behaviour is an important part of the planning process and assists with ensuring that there is a match between them and the destination experience. Recent research⁴ conducted by both Tourism Campbell River Region (CRR – including Sayward) and Vancouver Island North (VIN) during the summer of 2015 has produced valuable insights into the region's visitors. The findings are based on 462 completed surveys for CRR and 522

⁴ Tourism Campbell River & Region, December 2015, *Visitor Profile – Summer 2015*; Vancouver Island North, November 2015, *Visitor Profile – Summer 2015*

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for VIN. However, it should be noted, that the data from this research is potentially skewed in favour of regional and Canadian markets. The sample was self-selected and was based on those who completed a ballot with their contact information at various ballot boxes across the study area. Participation was incentivised with the opportunity to win a prize package provided by local tourism operators. This is likely to be of greater appeal to more local/regional visitors who can return and is less likely to entice longer-haul travellers in the same way. Nevertheless, being aware of the bias that these research reports will have toward the more local/regional visitors, the responses are still of considerable value in understanding elements of trip behaviour.

The following table looks at trip purpose and characteristics and summarizes both sets of data as Sayward has the potential to attract market share from both markets.

Table 1 Trip Purpose and Characteristics – CRR and VIN

Trip purpose and characteristics	CRR	VIN
Region is the main destination	61%	71%
Planned stop – not the main destination	33%	28%
Unplanned stop	6%	
Leisure	71%	78%
Visiting friends and relatives	35%	15%
Business / work + leisure	6%	4%
Business / work	4%	3%
Overnight	68%	97%
Day visit only	32%	3%
Repeat visit	73%	46%
First time visit	27%	54%
Trip planning – time period		
One month or more	41%	55%
Less than one month	38%	36%
Spur of the moment	21%	9%

While the two regions are destinations for a significant proportion of their visitors, particularly VIN, it should also be noted that CRR is a stop on route to another destination for almost 35% of its visitors, and that as many as 6% of visitors to CRR make an unplanned stop. Taking this into consideration as well as the relatively high proportion (21%) that visit CRR on the spur of the moment, would suggest that **Sayward is well located to benefit from this type of spontaneous trip behaviour, provided the community can create reasons for impulsive travel** or a diversion while on route to elsewhere, and an awareness of these reasons.

The CRR report indicates that 32% are day visitors. Data from the Campbell River Visitor Centre, on the other hand, shows that over 40% of all visitors to the Visitor Centre (VC) were day visitors, and a further 27% were only stopping overnight. **Given the possibility of spontaneous trip behaviour and the greater likelihood of short-stay visitors using the VC, the role of the travel counsellors can be critical in affecting this type of behaviour.** In light of this, it is important that VC staff have a good

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understanding of local and regional opportunities, including those available in Sayward as they can play an important role in extending the visitor stay.

This flexibility in travel behaviour was a characteristic noted in the Value of the Campbell River Visitor Centre – Summer 2006 research conducted by Destination BC, with travellers indicating that less than one-quarter of their trip activities in Campbell River were planned before arrival and almost half indicating that they were flexible in their length of stay. While the research is now dated and approaches to trip planning have changed, it is nevertheless a reminder of the potential that exists to influence visitor behaviour within the destination.

Table 2: Trip Planning and Use of Electronic Devices

Trip planning – sources of information before travel	CRR	VIN
Friends and relatives	58%	45%
Previous personal experience (previous visit)	36%	31%
Destination-specific website	31%	57%
Regional tourism guide/pamphlet	20%	37%
Travel information centre	14%	20%
Websites providing traveller reviews	13%	29%
Magazine/newspaper	13%	9%
Travel rack on BC Ferries	11%	15%
www.HelloBC.com	9%	14%
Social media	7%	9%
Travel booking website	6%	12%
Use of electronic devices during travel	CRR	VIN
Smartphone	51%	55%
Laptop	35%	45%
Tablet	30%	37%
None	20%	11%
Computer provided elsewhere (visitor centre etc.)	7%	7%

The data highlighted in Table 2 emphasizes:

- **The importance of the internet in trip planning before and during travel, and the obvious need to use the internet to provide a compelling message.** The use of electronic devices while travelling highlights the importance of providing timely and relevant digital information that will help the visitor maximize the experience within the destination. This in turn will increase level of spend and visitor stay.
- **The critical need to deliver exceptional experiences.** Word of mouth, social media, travel reviews and previous experience all play a key role in inspiring both new and repeat visitation.
- The ongoing value of print material. While electronic devices are key to providing information, print material still contributes to trip planning. Regional guides and material that is available at strategic points of the travel experience, such as the ferries, can still

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influence decision-making. Once within a destination, the print material that tends to be requested most frequently includes maps and trail guides⁵.

Table 3: Attractions Visited and Activities Participated In

Tourism attractions visited	CRR	VIN
Parks and trails	79%	88%
Beaches	63%	87%
Local shops/boutiques	52%	69%
Museums and/or interpretive centres	36%	65%
Historical sites	22%	62%
Artisan studios/workshops	22%	36%
Farms and/or farmers' markets	20%	20%
Art galleries	18%	31%
First Nations facilities/cultural centres/events	18%	68%
Playgrounds and/or water parks	13%	n/a
Gardens	11%	15%
Brewery/winery, distillery and/or cidery	10%	n/a
Activities participated in	CRR	VIN
Hiking	53%	55%
Shopping	47%	36%
Beach activities	47%	59%
Self-guided sightseeing	40%	52%
Boating and/or sailing	19%	31%
Fishing (salt water)	17%	20%
Bird watching	15%	37%
Kayaking	9%	22%
Whale watching	8%	57%
Cycling (road)	7%	6%
Fishing (fresh water)	7%	n/a
Golfing	7%	n/a
First Nations cultural tour and/or dance	n/a	30%
Booking behaviour (for attractions and activities)	CRR	VIN
Booked ahead of time directly with tour/activity company	54%	55%
Booked during the stay with the tour/activity company	34%	46%
Booked through a Visitor Information Centre	13%	13%
Booked with a travel booking website	5%	10%

There are variations between the two destinations that can be explained by the nature of attractions and activities currently on offer. Nevertheless, the data shows the **significance of nature-based activities and cultural heritage attractions to the visitors that are currently visiting Campbell River and north**. For Sayward, there is clearly an opportunity to offer activities that will

⁵ Campbell River Visitor Centre 2015 statistics

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be of interest to the current visitors. However, the challenge will be in communicating the offer effectively and in developing an experience that is unique and engaging.

Market trends have clearly shown a rapid growth in demand for experiential tourism (see Appendix A). **Enabling visitors to have an authentic and immersive experience** that gives them the opportunity to connect with locals and to gain unique insight into the ‘personality’ of the destination is required to attract today’s traveller and to appeal to those who are looking for a unique get-away. Experiences of this nature are perceived as providing added-value and can command a higher price.

Table 4: Market origin

Visitor origin		CRR	VIN
Vancouver Island			
North Central		17%	10%
Central Island		12%	11%
South Island		11%	10%
Cowichan		4%	4%
Pacific Rim (and Gulf Islands for VIN only)		<u>2%</u>	<u>0.5% (0.5%)</u>
		46%	36%
Other British Columbia	<i>Campbell River VC data</i>		
Vancouver Coast & Mountains		19.5%	26.5%
Thompson Okanagan		4.5%	1.5%
Other		<u>1%</u>	<u>1%</u>
	British Columbia 34%	25%	29%
Canada (other than BC)	Other Canada 21%	23%	13%
United States	US / Mexico 10%	4%	9%
International	International 35%	3%	11%
	(with 31% of total coming from Europe)		

According to the two research reports, Vancouver Island and the Vancouver Coast & Mountains Region are the primary markets and account for just under two-thirds of the market for both CRR and VIN. For CRR almost 30% of the visitors are from the Central Region of Vancouver Island and northwards and 46% in total comes from the island. This data combined with length of stay data and general trends suggests that **the area is popular for short get-away trips for the local market**. This offers an opportunity to Sayward as local Vancouver Island and Lower Mainland residents look for new ideas and new destinations for shorter trips.

However, the skew in the data becomes somewhat apparent when the research data is compared to the Visitor Centre data. There are distinct differences in the composition of visitor origin between the data sources, with the Campbell River VC data appearing to under-represent the regional markets and over represent the US and international markets, including a high percentage of European travellers. While it is difficult to be definitive with regard to geographic markets, it is apparent that **both local/regional markets and the European market are significant to the area**.

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2.2.2 Explorer Quotient – a new perspective on markets

Traditionally markets have been looked at largely in terms of their demographic and geographic characteristics, and their activity participation, as outlined in the previous section. Destination BC has now licensed Destination Canada's Explorer Quotient® (EQ) tool – a psychographic segmentation tool that looks more closely at the visitors' social and travel values. EQ has identified nine traveller types. While further research based on visitor postal codes is required to determine which segments are attracted to Sayward, the product and experiences on offer would suggest that the destination would appeal to **Authentic Experiencers and Cultural Explorers**. As an initial step to using EQ in product and market development activities, Appendix B profiles the key characteristics of these two traveller segments – their values, their top 10 most appealing activities, and the experiences that are more likely to resonate with these segments. Further assistance on using EQ intelligence is available from both TVI and Destination BC.

2.2.3 Sayward markets

Looking at Sayward specifically, the only source of information on the current markets was the workshop itself and the discussion among stakeholders. From this anecdotal evidence the following characteristics were identified:

- The **European market** appears to be significant with local operators indicating that approximately 50% of those using the campground and the wharf gift shop are European – particularly German, Dutch and British with the majority of these travelling in recreational vehicles – often only stopping overnight on their way north. Many of these travellers are undertaking a large circuit tour of BC and Alberta via BC Ferries to Prince Rupert. The stop at Sayward is short but there is potential to make this a more remarkable experience and one that begins to generate unique appeal.
- There is a growing interest from visitors interested in **geocaching** as a specific activity
- A shift in market dynamics appears to be occurring with a **recent increase in interest from VI residents from Courtney and south** – with many stopping over to play golf at Rainbow's End Golf Course.
- **Hunting and fishing** remain popular pursuits for the VI and Lower Mainland markets.

In addition to these existing and emerging markets there is a growing association with specific outdoor adventure activities relating to a range of new and established outdoor assets that are gaining prominence, including:

- The recently developed Salmon Brewster Equine Campsites and Trail Corridor Project;
- The annual Kusum Klimb event.
- The Sayward Forest Canoe Route – although not located within Sayward, the affiliation by name may provide market opportunity

Building on these assets, together with existing strengths relating to steelhead and fly fishing, ocean fishing and kayaking, will potentially strengthen Sayward's position as a unique base for outdoor adventure.

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2.3 The Planning Context

2.3.1 Leadership and administration of tourism

The Village of Sayward is firmly committed to supporting the development of tourism. In early 2015 Council established a **Tourism Committee** with eleven members that include the Mayor and Council representatives, tourism operators, the Harbour Authority Board, Sayward Futures Society and local residents. The Village is spearheading the development of tourism, recognising that it is an important economic driver. The Council has allocated \$4,000 to the Tourism Committee from the 2015-2019 budget, and this will be reviewed annually as strategic projects are undertaken.

Following a resolution by Council, **Sayward Futures Society** operates the 'official tourism information centre' located at the wharf. As its hours of opening are limited, information is also available from the Village Municipal Office during office hours. Information is provided on local hiking trails, together with a local area map, business cards of local businesses, and general information on Village amenities. In addition, the gas station/convenience store at the Highway 19 junction also offers travellers information on an informal basis.

2.3.2 Official Community Plan – Village of Sayward Bylaw No. 308

The growth of tourism is identified as a specific economic objective in the Official Community Plan of 2005: *To encourage tourism and to enhance tourism related opportunities and services* (Section 2.4 b). This is supported by objectives that relate to the improvement of the wharf and boat harbour facilities for economic and recreational use; the enhancement of the Village; the protection of views of the surrounding mountains, ocean, forests, rivers, and estuary; and the enhancement of access to parks, forests, ponds, the estuary and the ocean waterfront for recreational use.

The OCP established three Comprehensive Development Areas – two of these relate specifically to the need for land-use planning that will leverage the area's tourism potential:

- a) Comprehensive Development Area 1 (CDA-1) Tourism/Marine is highlighted as an area where development is intended to provide for a range of opportunities including tourism, recreation and recreational access.
- b) Comprehensive Development Area 2 (CDA-2) Tourist/Residential – is zoned for development that permits tourism accommodation and RV parks.

The OCP has a wide interpretation of tourism and recreation and defines it as *related commercial uses including but not limited to eating and licensed drinking facilities, convenience commercial, guiding, fishing, travel and charter activities*.

2.3.3 Sayward Economic Development Strategy

Council subsequently commissioned the development of an economic development strategy which was completed toward the end of 2013⁶. This Tourism Plan builds on the work of the strategy. The overarching vision for the Sayward economy is one that *features a range of quality, family-*

⁶ Vann Struth Consulting Group, December 2013, *Sayward Economic Development Strategy*

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*supporting employment opportunities and excellent commercial services to meet the everyday needs of both its growing population and its many visitors*⁷. While not specific to tourism, this vision statement speaks to the importance of developing the infrastructure that will support the growth of economic development opportunities, including tourism. The strategy provides the broad context for tourism development as part of the wider economy, and outlines a range of initiatives that have the potential to strengthen the community as a destination.

2.3.4 Recent initiatives

The Village Council, community organizations, and individual operators have worked on a range of initiatives that demonstrate the community's commitment to developing tourism. In addition, the Council has worked closely with the Ministry of Transportation and Infrastructure to identify a series of priority infrastructural projects. The completion of a number of significant projects and the ongoing work, together with the local initiatives will strengthen the destination and increase its capacity to attract visitors. These include:

- The completion of the \$1.8 million **cycling safety improvement project** involving road widening to allow for 1.2 metre wide shoulders for the 11 km of Sayward Road to improve cycling safety along this stretch of two-lane roadway. This significantly increases safety for both cyclists and pedestrians and offers the visitor new opportunities.
- The completion of 3km of **shoulder widening** along Highway 19 in the Roberts Lake area to better accommodate cyclists, and the ongoing work that will result in the development of a new passing lane between Campbell River and Sayward. These cycling/highway projects are part of the Province's 10-year plan to improve aging transportation infrastructure⁸ and will considerably enhance the travel experience and safety associated with Highway 19.
- **The Marina Plan** at Kelsey Bay is currently in the planning stages, following an initial grant of \$400,000 by the Island Coastal Economic Trust that must be matched equally in order to move forward. The project would extend the current float network to provide additional moorage and the new Harbour Services Office would include a public washroom and commercial laundry facilities, together with small-scale private sector services and amenities such as a café. Other private sector investments, such as the addition of an ice plant and more efficient transportation systems will add further value to the project and will strengthen the fishing industry and related sectors of the economy. Ultimately the project will allow Sayward to market itself more effectively to the marine tourist market.
- **Upgrades to Kelly's Trail** and the Kelly's Bridge project have opened up the accessibility of some parts of the river estuary experience to wheelchair users.
- **Private sector investments** such as the opening of Skogan's Diner at Rainbow's End Golf Course, the improvements to the Cablehouse Café and the establishment of a new whale watching business.

⁷ Ibid

⁸ BC Government, March 2015, *B.C. on the Move: A 10-Year Transportation Plan*

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- The work of the Back Country Horsemen of British Columbia – North Vancouver Island Chapter in developing the **Salmon Brewster Equine Campsites and Trail Corridor Project**⁹, and the subsequent authorization from BC Recreation Sites and Trails has created the first Crown land formally designated equine-friendly public recreation campsites on Vancouver Island. The campsites at both ends of the trail corridor and the rehabilitation of the trail will attract a new market to the Sayward region and the project has the potential to produce incremental economic benefits.
- **Village enhancements** and the implementation of a beautification program including further development of the Village Gardens and facility and façade upgrades have improved the aesthetic value of the village.

In addition to these initiatives, **the sale of the village mall** will potentially result in the opening up of new businesses. The revitalization of the building ideally will result in a local convenience store, a bakery and coffee shop, and other conveniences that will service local residents and visitors alike.

2.4 A SWOT analysis overview of the destination and the tourism industry

The following table presents an overview of current strengths, weaknesses, opportunities and threats relating to tourism in Sayward.

Table 5: SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Good access off Highway 19 / proximity to airports • Kelsey Bay - protected harbour – mid-point between Campbell River and Telegraph Cove; vantage point for Van Isle 360 International Yacht Race • Natural beauty of the Salmon River estuary – excellent wildlife viewing; wetland reserve • Access to ocean and related marine activities • Outdoor recreation activities: biking, birding, photographer’s paradise; geocaching (60 sites in Sayward – 300 in the valley); community swimming pool; year-round 9-hole golf; canoeing and kayaking trail; equestrian trail • Recognition for steelhead and fly fishing; wharf fishing + equipment rental • Good access for hunting • Lakes and campsites – full service provincial parks; private and forestry sites 	<ul style="list-style-type: none"> • Within the wider valley lack of cell coverage • Lack of vision for the tourism industry and an unclear understanding of how to position the destination (prior to the workshop) • Fragmented online marketing and limited offline marketing – no cohesive website and no cohesive message • Average traveller does not have a perceived reason for stopping – easy to drive by the junction; difficult to get visitors in the region to stop and explore • Lack of infrastructure and retail outlets with closure of the mall – need retail stores, accommodation etc. to enable visitors to spend (closest convenience store is 12 km away at the Highway junction). • No public transit or taxi service – no bus service to Campbell River from the village – only from the highway junction

⁹ Back Country Horsemen of BC – North Vancouver Island Chapter, 2013, *Salmon Brewster Equine Campsites and Trail Corridor Project Final Report*

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Strengths	Weaknesses
<ul style="list-style-type: none"> • Good local cycling • A wide range of trails for all levels and types of activities, including new wheelchair accessible trail – provide excellent wildlife viewing opportunities • Beautification projects community garden, benches by ponds • Kusam Klimb – the area’s iconic event • Other local events – Oscar Daze, Slo Pitch Tournament, the fishing derby, the annual golf tournament and Saturday markets • Cultural heritage – Aboriginal heritage (ghost town – Port Kusum; participation in Tribal Journeys); “Valley of a Thousand Faces” (a unique outdoor portrait gallery); York Island and its military history; history of BC Ferries • Natural heritage – largest and oldest commonly known specimen of Yellow cedar; giant trees; caves • Improved eating facilities – Skogan’s Diner at the Golf Course / Cablehouse Café • RCMP and health clinic – safe destination • Affordability • Establishment of the Tourism Committee – strong level of commitment to developing tourism and to working more collaboratively • Revival of Sayward Futures Society • Emphasis on sustainability – recycling / eco-friendly 	<ul style="list-style-type: none"> • Limited wayfinding signage • No fuel in harbour except by advance order • Traditionally a lack of collaboration / silo approach – now changing through the work of Sayward Futures • No established relationship with K’omoks First Nations • Limited financial resources / limited volunteer and staff resources • The perceived value of tourism by the wider community is low compared to traditional industries

Opportunities	Threats
<ul style="list-style-type: none"> • New bike lanes • Improved highway signage • Marina Plan – approval for a range of improvements – expansion of harbour support services, such as fuel service, ice, maintenance and repair, and food services for visitors • Improved access from Campbell River with development of recently approved passing lanes • Sale of mall – potential for businesses to 	<ul style="list-style-type: none"> • Insufficient funds to collaborate effectively in future regional collaborative models • Global economics • Aging resident population and limited labour pool • Proximity to Campbell River – difficult to strengthen overnight tourism • Rising ferry costs

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<p>reopen</p> <ul style="list-style-type: none">• Enhanced potential to collaborate with Campbell River• New whale watching business + potential to build on the partnership with Campbell River Museum to increase boat tours• Potential to leverage proximity to Mt. Cain• Improving US market and the weak Canadian dollar against other global currencies	
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3 The Development Plan 2016-2018

3.1 Identifying the Tourism Vision

The vision for the industry and the destination is based on a list of phrases describing a preferred future provided by workshop attendees¹⁰.

By 2020 Sayward will be a vibrant coastal community visitor destination, well known for its readily accessible array of land and water-based experiences and adventure, local village events and cultural heritage – developed and promoted by a cohesive tourism industry within the supportive framework of a collaborative regional structure.

This vision seeks to capture the underlying key elements that were expressed throughout the workshop relating to the need for:

- **A strong identity as a destination** for a wide range of easily accessible nature-based and cultural heritage activities. The identity will come from a renewed focus on positioning Sayward more effectively online and ensuring that the promotional message is connecting with the target markets.
- **The development of internal capacity within industry to diversify and enhance existing visitor experiences** and to find creative ways to maximize local tourism and recreational assets.
- **A cohesive community approach** to strengthening the tourism sector and understanding its strategic value to the overall health and sustainability of Sayward.
- **A collaborative regional approach** to developing tourism that can take advantage of the assets of Sayward and at the same time be leveraged by Sayward to build a stronger industry.

3.2 The Action Plan

The workshop provided an opportunity to identify specific actions that would capitalize on the strengths and address weaknesses. The plan is short-term in its implementation timeline and is designed to focus on actions that would make a difference in the coming 18 to 24 months. Resources are limited and efforts will need to concentrate on working collectively to build on existing initiatives and to maximize limited funds, while identifying how best to work within the regional context.

¹⁰ Busy mall; full campsites – not just the softball weekend; museum (potential); serviced marina; year-round; partnership with regional communities; strong tourist identity; development of organized product; strong well-functioning tourism committee; development of guides; accessible from an internal perspective; focus as a base for further touring activities; new town brand (Welcome to Sayward Valley – Nature’s Playground); well-connected message on the web; part of a regional tourism consortium

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3.2.1 *Moving forward with existing community and related economic development and infrastructure initiatives*

The Village of Sayward and Sayward Futures are already engaged in a range of community development projects that are designed to revitalise the village and, as noted, are working to improve local and regional infrastructure. These projects are designed to enhance the commercial viability of Sayward. At the same time they will be critical to building the competitiveness of the community as a visitor destination and as a location for tourism businesses to operate profitably.

The projects vary from highway and marine related initiatives which are well under way, to telecommunications and the development of new commercial services. All of these projects have been initiated and need to be pursued through to completion.

ACTIONS

1. Continue the current partnership efforts with Strathcona Regional District to **improve highway signage** and increase the visibility of Sayward as a destination for passing traffic. Signage could include 'Things To Do' in Sayward to encourage people off the highway.
2. **Continue to pursue completion of the cell tower project** – ideally before the summer season. The lack of cell coverage and limited high speed internet access are major issues both for business operators and visitors. The latter expect connectivity and the absence of it can contribute to a perceived uncertainty regarding safety. More importantly, good connectivity is fundamental to competing effectively in today's marketplace, and businesses without this in place are at a distinct disadvantage.
3. **Continue the current efforts to encourage and incentivise the development of new commercial services in the strip mall.** This is key to generating a higher level of spend in the community and to encourage longer stay camping. The lack of conveniences is contributing to shorter stays and to visitors' decisions to base their overnight visits in Campbell River.
 - a) Work collaboratively to **develop an investment strategy** that will attract new businesses, including accommodation services. This will require building a strong understanding of current visitor levels and preparing a preliminary feasibility analysis as part of an investment portfolio. The community has the potential to prove attractive to investors, but a viable summary business case may need to be developed for key services. Working with operators to gain an understanding of current business levels and business confidence will be important, and will require working together to agree on a system of collecting data on visitor numbers and establishing a baseline moving forward.
 - b) In developing an investment prospectus, **identify the opportunity to establish a business that includes providing a range of rental services.** Fishing equipment is already available to rent for fishing off the wharf. The new bike lanes will raise interest in local cycling, and offering bikes for rent is a consideration for the future. This type of initiative needs to be based on what local tourism operators identify as the most viable key gaps to fill.

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4. The revival of Sayward Futures provides an excellent step toward **building stronger connections between local businesses**. The organisation should continue to identify practices that will assist in revitalizing existing businesses and building a stronger internal business community. This will include strengthening the tourism sector and should be done in collaboration with the Tourism Committee. **Providing networking opportunities for local tourism businesses** and encouraging participation in regional tourism networking will generate a stronger sense of 'tourism community' and can be used to continue exploring new and innovative ideas for growth. Participation in TVI events, including training events and the Annual AGM and Tourism Conference will play an important role in further reinvigorating the tourism industry.

3.2.2 Building a collaborative approach and a stronger community business model to developing tourism within a regional framework

Strengthening Sayward's position as a destination will require adopting a different perspective on how to do business. A **collaborative community and regional approach** will be essential to making a difference moving forward. This is likely to involve a shift in mindset and will need to be nurtured and encouraged step by step. At the community level identifying and agreeing on options that would secure additional marketing resources will be conversation that the community tourism stakeholders will need to engage in. In addition to building internal capacity, resources and new ways of doing business, there are distinct benefits to be gained from adopting a regional perspective on the development and promotion of tourism. This is the model that is increasingly adopted elsewhere and will provide new opportunities as collaboration develops.

ACTIONS

5. Campbell River is in the process of restructuring its delivery of tourism services and will be looking at options that will include a stronger regional approach, assuming that regional partners are interested and willing to collaborate. **This restructuring provides an opportunity to explore the potential of building a stronger partnership.**
 - a) Campbell River's new funding model will likely be based on establishing the **Municipal and Regional District Tax (MRDT)** within the City. This will result in the application of an additional tax of 2-3% on accommodation overnight stays in properties of four or more units/rooms and will generate new funds for marketing. While this was not discussed at the workshop, accommodation providers in Sayward should be made aware of the opportunity to the MRDT program as a means of creating new funds for marketing. It is recognised that there are very few rooms in Sayward at present, but if the wider region looks at the option of introducing the tax and working with Campbell River to establish a stronger marketing presence, local operators will need to be made aware of the potential of the initiative. (It requires the support of the accommodation sector to be successful). A regional MRDT model has been successfully implemented in North Vancouver Island, and a regional approach of this nature provides the basis for stronger collaboration. In addition, should Sayward decide to partner with Campbell River in this

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way, the tax would then automatically apply to any new accommodation business that might be established in the community.

6. Regional collaboration opens the opportunity to benefit from the cooperative marketing program offered by Destination BC (see section 1.2.2). Collaboration of this nature will require financial investment. The current level of municipal funding for tourism in Sayward is understandably low and consideration needs to be given to identifying ways of generating other sources of revenue. In addition to the MRDT, potential options include:
 - a) The development of a **'pay-to-play'** program where marketing and promotional opportunities for Sayward are identified and tourism operators are offered the opportunity to partner on an initiative. If this is combined with the designated tourism funds, it will enable the limited community funds to 'stretch' further. Similarly the collection of **'membership dues'** into a cooperative pool of funds for tourism is a feasible option, provided that the participants have confidence in how the funds will be spent. A business plan that clearly outlines the intended marketing initiatives and use of funds will be essential in gaining a level of commitment. There are variations on this approach elsewhere. The website <http://ourcortes.com/>, for example, is a Cortes Island Business and Tourism Association initiative. A proportion of funds that local operators pay to the Discovery Islands Chamber of Commerce are returned to the Association and this money is partnered with any available grant money and/or cooperative marketing funds from Destination BC, together with small amounts of revenue generated from promoting events. Cortes Island has a community website, but recognized the importance of developing an additional 'clean' visitor-focused site free of community messaging. While the initiative appears to be successful and serves the local operators well, the disadvantage of this type of approach is that it promotes only those who are willing to participate financially and the level of funding is dependent on Chamber membership remaining stable. In an initiative of this nature it will also be important to profile the non-business assets – the trails and related experiences.
 - b) The implementation of a **tourism levy** where a small proportion of a municipal business license is assigned to tourism marketing. The Parksville Qualicum Beach Tourism Association has benefited from a \$20/licence since 1998 – initially from all licensed businesses in the City of Parksville and the Town of Qualicum Beach. More recently this support is only coming from the latter, and demonstrates again that stability is not guaranteed if there is a change in local municipal government policy. The opportunity to collect using this approach is also restricted to the municipal area only, as Regional Districts do not issue business licences.
 - c) A further option that was discussed in the workshop involves the implementation of a **destination marketing fee** (DMF) as a means of raising new funds for marketing. The DMF can be applied to a range of business operations, including accommodation, guided tours and other commercial activities, or just to accommodation. A DMF is applied to the invoice before tax with the understanding that these funds are retained

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and used for the purpose specified. **As with all of these options, a wider dialogue is needed to help establish potential interest in what might work best.** In the case of the DMF, the option ideally needs full support from select or all tourism business sectors, and the process needs to be characterized by transparency from the perspective of both the customer and the business operator. A DMF is a voluntary contribution from the visitor and promotional material needs to clarify that this is NOT a tax. While a DMF can raise funds it does require willingness on the part of the visitor to pay it, and willingness on the part of the operator to collect and pass the funds over to whatever organization has responsibility for its administration. Moving forward with a DMF will need careful planning and consultation, and the development of a business plan that shows exactly how the funds will be utilized.

It should also be noted that a combination of options can be considered. If, for example, the DMF was put in place and certain operators did not participate. These operators could then be offered the opportunity to engage in collaborative marketing on the basis of an annual 'membership' fee or 'pay-to-play' with involvement in specified marketing activities, such as listings on a website.

7. Building the appeal of Sayward requires stronger word of mouth promotion by the industry itself. It is recommended that the Tourism Committee **organizes familiarization tours for regional Visitor Centre staff.** These should occur at the outset of the season and should aim to ensure that VC travel counsellors are familiar with the range Sayward's visitor experiences from a first-hand perspective. This type of initiative may well result in reciprocal tours, and anyone involved in the delivery of information services should engage in such tours where possible to improve the level of referrals from within the wider region. Section 2.2 of this report has already highlighted the degree to which visitors can be spontaneous in their trip behaviour.
8. Developing a new 'business model approach' to tourism within the community will require **good internal communications.** It is recommended that the Tourism Committee works with Sayward Futures to develop a mechanism and content for a regular news update that is specific to tourism operators. Highlighting regional events and news, and promoting success stories will create a greater sense of 'community' for the tourism sector.
 - a) In developing this 'business model', it is also important to establish an understanding of the significance of tourism within the wider community. This will assist in strengthening overall support for future initiatives and expenditures related to tourism. TVI offers helpful resources in communicating this message¹¹ which can be used in combination with a local profile of tourism developments and industry performance.
9. With an enhanced internal identity and opportunity for establishing ongoing strategic direction for the community, the Tourism Committee, Council and Sayward Futures are all in a stronger position to **identify and pursue emerging grant opportunities.** The 2014 Village of Sayward

¹¹ <http://www.tourismvi.ca/get-informed/value-of-tourism/> and <http://www.tourismvi.ca/wp-content/uploads/2014/03/Value-of-Tourism.pdf>

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Annual Report recognizes the frustration of seldom having *shovel ready projects sitting on the shelf waiting for grant opportunities*. An improved sense of direction from within the tourism sector should assist in identifying potential projects that will drive tourism and will help in the preparation of ‘shovel ready projects’ – at least in concept, including establishing support in principle from regional partners. The workshop promoted this approach with particular reference to trails related projects.

3.2.3 Exploring opportunities for product and visitor experience development on an ongoing basis

Establishing a deeper understanding of Sayward’s unique attributes and a greater level of appreciation for the importance of developing ‘experiences’ that will allow visitors to connect more fully with the community, will together create stronger market appeal and will improve the viability of all businesses involved in the process. This is the new basis for building stronger destinations. It is based on the concepts of **partnership, innovative packaging, and new approaches to developing and delivering experiences**. A model of this nature involves everyone within the ‘supply chain’ and every element of the destination experience, including the front counter staff in all related commercial business, and all aspects of the ‘public face’ of Sayward, including effective wayfinding signage and interpretation, visitor information, the look and feel of the community, the quality of the marina facilities, and the overall sense of welcome that visitors feel throughout the duration of their stay. This **‘sense of welcome’** needs to be actively nurtured to generate a longer length of stay, increased visitor spend, referrals and repeat visitation. In this context Destination BC’s goal of *fostering remarkable experiences* needs to be understood as involving the entire community.

The following actions relate to specific opportunities that were discussed at the workshop.

ACTIONS

10. Trails are a core part of the Sayward visitor offering and need to continue to be at the forefront of thinking in terms of ongoing planning and development.

- a) TVI is currently working on Phase 2 of a **regional trails strategy for Vancouver Island and the Sunshine Coast**. Phase 1 involved creating an inventory and user-friendly database of 235 ‘market-ready’ trails in the combined regions. The Village has been asked to review the Campbell River and region database and to highlight gaps that relate to the Sayward area. This will occur once the tourism committee has some more capacity to focus on this activity. The inventory is detailed and information on a wide range of variables relating to the location, length, management and maintenance, visitor information, the nature of the visitor experience, and market readiness has been collected. Going forward, Village staff need to work with local trails enthusiasts **to ensure that the inventory has captured key ‘market ready’ trails**. This is a critical step in being able to benefit from this project.

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b) **Participate in the forthcoming regional workshop and/or stakeholder consultation for Phase 2 of the project.** This phase will involve developing a **strategic plan to align visitor needs and expectations with the existing supply of trails.** The project will see coordination and collaboration between stakeholder groups with the intent of identifying the gaps in overall trail product, and how Vancouver Island and the Sunshine Coast can work together to improve and transform these existing assets into international market ready tourism attractions. This is a transformative project and Sayward will benefit if it engages strategically in the roll-out of this phase after ensuring that the primary trails have been captured in the database. The forthcoming workshop or stakeholder interviews will be focusing on the following:

- Existing trails tourism visitation to the destination
- Destination assets
- Current markets including market origins and Explorer Quotient types
- Opportunities and challenges regarding trails in the destination
- Trails related tourism brands, positioning statements and communication channels
- Destination partnerships and sector synergies
- Current marketing, promotions and visitor information services
- Organizations involved in the delivery, management and marketing of trail experiences

Sayward stakeholders involved in developing and using trails should meet to discuss their input against as many of these factors as possible for the community trails that are/will be included in the inventory. This list of factors will help in understanding all that needs to be considered in developing successful trails-based visitor experiences.

- c) The **community dialogue on trails** should also be used as an opportunity to:
- Build the community's **inventory of trails** (this will include many that are not listed on the TVI inventory);
 - **Identify signage needs**, particularly relating to trails that are likely to be used by visitors;
 - **Identify ways of enhancing the experience** through mapping, interpretation and new ways of telling stories related to the trails;
 - **Prepare mini-project plans** to be ready on a preliminary basis as shovel-ready projects – this is likely to include new options for presenting the trails experience and related information to the visitor digitally;
 - **Maintain a search and an awareness of forthcoming grant and funding opportunities** that would be applicable to the proposed projects.
- d) Sayward has a strong association with the **Sayward Forest Canoe Route in name-sake** (can be considered as a 'water trail') and the **Salmon Brewster Equine Trail Corridor**. Further discussion needs to be given to identifying ways of leveraging these associations

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with these unique trail products and to finding new approaches to attracting new revenue into the community from these assets.

- Work with the Back Country Horsemen of British Columbia – North Vancouver Island Chapter to discuss ways of raising the profile of the Trail. These discussions should include exploring the viability of hosting regional or provincial events in the Sayward area, including the organization’s annual Rendezvous event.
- Work with TVI to understand and identify new ways of **targeting specific types of trail users**.

11. Sayward has already developed a growing recognition of its accessible nature-based adventure product through the iconic annual **Kusam Klimb** event. The positioning and profiling of this event needs to be strengthened in regional messaging and opportunities for ‘trial practices’ could be further promoted.

12. The scenario planning discussions that took place at the workshop highlighted the need to work in partnership to create integrated experiences that would leverage existing assets in a creative manner, but without significant capital investment. The discussions on the community’s unique strengths drew attention to a range of under-used assets and **potential opportunities for small-scale entrepreneurial development and experience development**. These included:

- Evening storytelling around a fire-pit;
- Seafood barbeque on the beach with indigenous menu;
- Organized interpretive tours of York Island by a local licensed guide and entrepreneur;
- Packaged experiences that include local tasting experiences enhanced through interpretation and story-telling – e.g. a talk on cultural heritage, the steam donkey and antique logging equipment at the Cablehouse Café and the 1,000 faces art at the ice cream parlour;
- Walking tours of Kusum Ghost Town developed in collaboration with the K’ómoks First Nation;
- Guided walk of the old trees;
- The development of excursions that included picnic hampers/boxed lunches profiling local foods created by local business operators;
- Cycle rental services and the promotion/development of cycling itineraries from Campbell River – that could include organized provision of lunches on route at Robert’s Lake, a tour of the hatchery etc.;
- Itineraries that include the Saturday market;
- Kayaking in the estuary – subject to considerations regarding safety and provision of rental services;
- Walking tour of gardens and promoting of the ‘boom boat ballet’;

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- Packages that include adventure (climbing H'kusam Mountain) combined with opportunities to interact with locals in the evening (such as fire-pit events or beach barbeques).

The consistent characteristic underlying these ideas is the development of visitor experiences that are unique and will provide that immersive emotional connection with the local community. They also illustrate the need to partner in a creative manner and the value of developing packages and unique itineraries for independent travellers. Most importantly, these ideas illustrate how the economic benefit of tourism can be spread within the community even BEFORE new commercial services are established.

Creating new visitor experiences of this nature has the potential for Sayward to develop a unique and appealing personality as a destination. It will require leadership and thinking through new approaches to working together to deliver these types of outcomes. The refining of ideas and implementation could be facilitated through Sayward Futures or through an alternative business model as illustrated in the case-study below.

'I Briganti di Cerreto'

This initiative was launched in 2003 to re-invigorate the small village of Cerreto Alpi in the mountains of Emilia Romagna, in northern Italy. At that time the village had approximately 80 inhabitants and was facing ongoing issues of rural depopulation. A group of 16 younger residents initially came together to establish a Community Cooperative called 'I Briganti di Cerreto'. After investing personal seed money, they launched the project with the running of a small café. The profits generated from this business were subsequently reinvested into a range of nature conservation, forest management projects and environmentally friendly tourist activities. The development of these activities has been a continuous process and had as key underlying objectives:

- The relaunch of economic development in the area
- The creation of job opportunities for younger residents
- The strengthening of the local identity (traditional trade and crafts)

Over time the initiative has resulted in a range of activities, that include among others:

- The establishment of a network of coordinated hosting facilities aimed at different target groups and a "dispersed community hotel" composed of a combination of existing hotel facilities and accommodation in the hosting community;
- The staging of new events;
- The development of organized guided tours with 'instructors' – by foot, horse, mountain bike, snowshoes etc.;
- Educational school trips;
- The establishment of a rental business hiring out equipment for winter activities;
- The development and management of a range of visitor packages coordinated with local operators;
- The management of a cabin used as a base for guided tours;

'I Briganti di Cerreto'

- The renovation of an old historic property to be used as accommodation for small groups;
- The establishment of a business organizing the rental of rooms and apartments within the community;
- The training of individuals to ensure they have the necessary skill-sets in guiding, and skills needed to manage and administer the project.

By 2013 Briganti de Cerreto was generating an annual budget of around €320,000 – with 80% being raised from forest management activities and 20% from tourism. All revenues are reinvested into the project and the small mountain community has been transformed into a tourist destination *strongly connected to the local community and pursuing the promotion of local identity in areas such as the environment, heritage and traditions, ancient occupations, typical products and local culture.*

Source: Centre for Strategy and Evaluation Services, September 2013, Enhancing the Competitiveness of Tourism in the EU: An Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice – Annex B – Good Practice Cases

13. The story of Sayward over time is unique and includes a wide range of **cultural heritage themes** including the traditions of the K'ómoks First Nation, the military history of York Island, Kelsey Bay's history as a port and its role with BC Ferries, the early trading activities, the upturns and downturns of the logging sector, the impact of the development of Highway 19, and its current focus on outdoor and marine-based recreation. These themes need to be explored in the context of how they might be used in developing new or enriching existing experiences and interpretative materials. An inventory of stories and identification of community story tellers will also be of value.
14. Sayward has a range of **annual events** that are well-recognised within the immediate region. These events provide an opportunity to explore new ways of encouraging visitors to stay one night longer through offering specific activities on either side of the event. The local Shuswap tourism community worked successfully with the Salmon Arm Roots and Blues Festival to create an event that inspired visitors to stay longer and explore the trails through guided activities and highlighted hiking/cycling opportunities. The "Routes and Blues" concept was offered in 2013 and 2014, and provides an interesting model¹² which could be adapted to Sayward.

3.2.4 Developing a stronger destination identity online and offline

Preparation for the workshop in November illustrated the fragmented way in which Sayward is currently promoted and the overall lack of information that visitors unfamiliar with a destination are looking for to plan a trip. Offline print material is also very limited, other than brief overview descriptions in regional guides. In today's market stimulating demand – spontaneous or otherwise, requires an online presence that creates awareness and interest and motivates a decision to visit.

The workshop attendees were in strong agreement that the online presence of Sayward is something that needs to be addressed as a matter of urgency. The Village is currently working on a

¹² <http://routesandblues.ca/>

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new website, as is Sayward Futures. While both are interested and feel responsible for developing online tourism material, the ideal and most strategic approach is **one well developed website that is designed first and foremost for the visitor**, rather than as the fulfillment of corporate responsibility. The visitor does not want the confusion of having to visit several websites – they are looking for an easily navigable site that inspires and informs with timely and relevant information.

ACTIONS

15. To ensure that this happens moving forward, it is recommended that the Tourism Committee works with the Village and Sayward Futures to see that the end result is one consolidated visitor-friendly website that links to relevant stakeholders and tourism operators.
16. In building this website, it will be important to give careful consideration to how Sayward is positioned. Its unique assets have been identified and these should be the basis of creating the **community's tourism identity**. In doing so, it will be necessary to develop online content that relates to the key experiences and assists the visitors with participating in the outdoor activities – the trails, the new cycling opportunities, the opportunities for camping, golf, accommodations etc. It is not sufficient to allude to these opportunities in a general descriptive manner – the visitor needs specific information to be able to plan effectively.
 - a) **Review the material on Destination BC's brand**¹³ and consider how Sayward can align with the positioning of the province.
 - b) Consider establishing a **pay-to-play** approach with minimal exposure for all businesses and more detailed profiling of operators that partner with the initiative.
 - c) **Ensure that the website is based on responsive web design** – this will allow for the development of a website that is fully functional and easy to browse on all platforms – smart phones, tablets and the computer.
 - d) The design of a new website will require **new written content and good visual images**. The Tourism Committee should establish protocols and a structure for the curation of these materials.
 - e) As a priority in developing online trip planning tools, consideration should be given to developing **map assets** (to include Campbell River, Telegraph Cove and Port Hardy) – these can remain as electronic files for the visitor to download or, if necessary, they can be made available in printed format.
17. **Develop a social media presence** through:
 - a) Encouraging operators to engage in and develop content for social media;
 - b) Developing social media content (Facebook, Twitter, Instagram) for the new website;
 - c) Strengthening this online presence through **feeding content to TVI** – particularly content for social media channels and explore opportunities to **leverage Destination**

¹³ <http://www.destinationbc.ca/Resources/british-columbia-tourism-brand.aspx>

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- BC's social media campaigns** – (for further detail, see Destination BC's online publication, How to Engage with our Social Media Channels¹⁴);
- d) Participating in relevant social media training events to gain a more comprehensive understanding of how best to utilise the various tools.
18. Consider developing a **digital “things to do in Sayward” page** that highlights the community's top activities. The Boundary Country website has used this approach very effectively to highlight the top activities and experiences in a range of areas: <http://boundarybc.com/top-25-must-experiences/> - by community, by region, and by activity sector.
19. While The Tourism Committee should take a lead on the direction of the marketing activities, it is recommended that consideration is given to **establishing a small working group with specific skills and experience in online marketing**.
20. Continue to partner with the City of Campbell River and other regional partners, including TVI, in the development of **content for regional printed guides**.

3.2.5 Encouraging the development of strong leadership through the Tourism Committee

The Tourism Committee has been tasked with a leadership role in developing and promoting Sayward as a destination. Opportunities to build capacity within the Committee should be encouraged where possible. Ultimately, it is important to understand that **effective leadership is based on effective partnership**, and that the Committee should seek to work closely with all key organizations and operators who can make a difference in ensuring the sustainability of the industry. This will also require seeking new revenue streams, including grants where feasible, and working effectively within a regional framework to maximize the scarce resources.

This Action Plan has been developed with an understanding that funds are limited. Moving forward with these tactics as resources permit (time, volunteer input and funds) and working together to foster the underlying commitment will create a momentum that will be invaluable as and when the opportunity arises for a greater focus on a regional collaborative approach to developing the wider area within Strathcona Regional District. In the initial stage, developing a strong internal understanding of Sayward's assets and how these can be utilized more effectively to provide unique and appealing experiences for today's markets will be key to making a longer-term impact on the economy.

¹⁴ <http://www.destinationbc.ca/getattachment/Marketing/Social-Media/How-to-Engage-for-Industry-Dec-2015.pdf.aspx>

Appendix A – The Tourism Industry

Key travel trends

Tourism is one of the largest and fastest-growing sectors in the world and has proven to be a significant contributor to global economic recovery. International tourist arrivals grew by 4.4% in 2015 to reach a total of 1,184 million, according to the latest UNWTO World Tourism Barometer. Approximately 50 million more tourists (overnight visitors) travelled to international destinations around the world last year as compared to 2014¹⁵. The UNWTO Confidence Index remains largely positive for 2016, with projected growth expected to be maintained, but at a slightly slower rate of 4%. Exchange rates, oil prices and natural and man-made crises will continue to impact the nature of growth.

Longer-term, growth is anticipated to continue, with predictions of over 1.8 billion international arrivals by the year 2030¹⁶. In the United States, Canada's key source international market, travel was ranked as the second fastest growing industry sector in 2013, and US outbound travel grew by 10.4% in 2014¹⁷. However, travel to Canada from the US, only grew by 0.9% in 2014, and Canada's market share of all outbound US travel fell from 19.4% in 2013 to 17.7% in 2014.

As global tourism continues to grow, there is a wide range of factors that interact to influence the growth of tourism and appeal of any destination, including:

- Changing consumer values and an increasing shift toward post-modern values systems that are characterized by 'socially conscious consumerism', as is exemplified in the dramatic growth of the '**sharing economy**'.
- **Aging population** – in BC the proportion of the population aged 65 and over is expected to reach between 24% and 27% in 2038¹⁸. With this aging, activities that are physically demanding, such as outdoor adventure (summer and winter) or alpine skiing are expected to grow at lower rates than the population of travellers as a whole¹⁹. Activities that require low levels of physical activity, such as wine/culinary and cultural activities, are expected to increase at higher rates than the population of travellers.
- **A growing demand for unique experiences, authenticity and local engagement.** This trend was clearly highlighted at the workshop. The implication of this trend is the need to move away from thinking about a destination as a series of products, a location for generic activities, or a place with great scenery. Instead the challenge of attracting visitors requires the focus to be on the emotions, feelings and sensations the visitors will have on their journey, the stories they will learn and the connections they will make.

¹⁵ UNWTO, January 2016, International tourist arrivals up 4% reach a record 1.2 billion in 2015 (press release) <http://media.unwto.org/press-release/2016-01-18/international-tourist-arrivals-4-reach-record-12-billion-2015>

¹⁶ UNWTO, 2011, Tourism Towards 2030 – cited in *UNWTO Tourism Highlights 2014 Edition*

¹⁷ US Office of Travel & Tourism Industries [website](#) (accessed February 2nd 2016).

¹⁸ Statistics Canada, September 2014, Population projections: Canada, the provinces and territories, 2013 to 2063 <http://www.statcan.gc.ca/daily-quotidien/140917/dq140917a-eng.htm>

¹⁹ *Opportunities for British Columbia: Activity-Based Tourists in Canada*, prepared by Research Resolutions & Consulting Ltd. for Tourism British Columbia, August 2004, a special analysis of the Travel Activities and Motivation Survey (TAMS) conducted from September 1999 & April 2000.

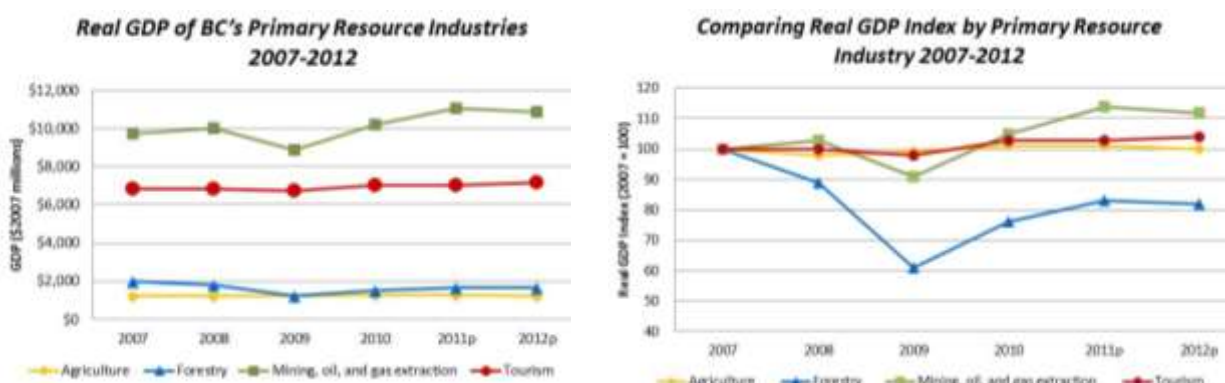
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- The use of **technology** in the creation of compelling experiences and in the management and marketing of the destination.
- The growing importance of **visual and video materials** in creating an identity for a destination and the role of **social media** as a tool for communicating targeted messages.
- **Falling value of the Canadian dollar** against other world currencies, particularly the US dollar is now stimulating new demand from the US and overseas markets. In this past summer, spending by Americans represented 52% of overall inbound spend, generating \$1.9B²⁰.
- **Growing level of national and international competition** through increasing commitment by destinations elsewhere to building competitiveness through integrated planning, product development, and innovative branding and marketing.

Tourism in BC

The significance of tourism to the economy

The tourism industry makes a significant contribution to the provincial economy compared with other primary industries, and the real GDP index has remained relatively consistent since 2007.



Source: Destination BC, 2015, *The Value of Tourism in British Columbia: Trends from 2003 – 2013*.

Visitors Volumes and Expenditures

In BC the year-to-date (January-November 2015) visitors are up 7.7% over the same timeframe the year before. This means an additional 329,673 visitors came to British Columbia so far in 2015²¹.

While these headline statistics have been released for 2015, the most current in-depth analysis of visitor volumes and expenditure available at time of writing this report relate to 2012²². In that year there were almost 17.9 million visitors in BC, of which 59% were BC residents, 18% were from other parts of Canada and just over 24% were international. However, the distribution of spending

²⁰ Travel Industry Association of Canada (in partnership with Visa), November 2015, *2015 Summer Travel Snapshot*

²¹ Ministry of Jobs, Tourism and Skills Training press release January 30 2016: <https://news.gov.bc.ca/releases/2016JTST0015-000104>

²² Destination BC, 2015, *The Value of Tourism in British Columbia: Trends from 2003 – 2013*.

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among these market segments is much different than the visitor volumes – in 2012, international visitors collectively accounted for 38% of visitor expenditures, with BC residents accounting for 38% and visitors from other parts of Canada 24%.

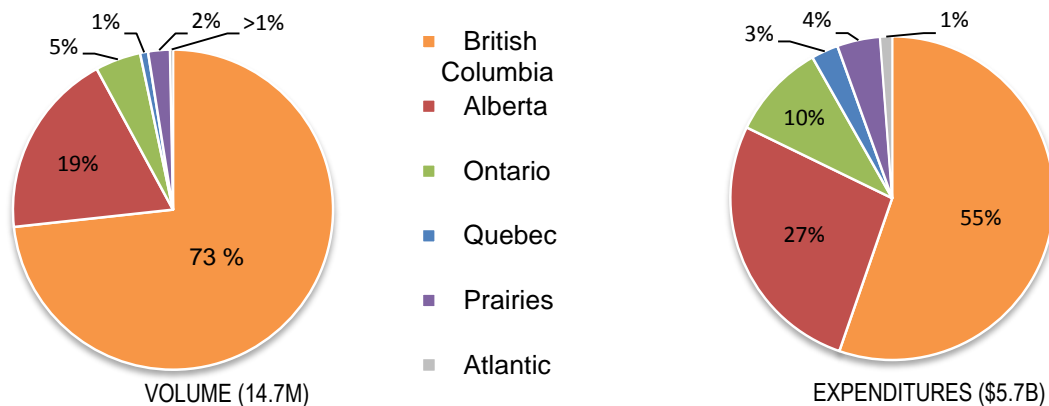
Visitor Volume (Overnight) and Expenditures by Market Origin, 2012



Source: Destination BC, 2015, *The Value of Tourism in British Columbia: Trends from 2003 – 2013*.

In 2013, BC residents accounted for 73% of the domestic market, but only 55% of domestic expenditures. Alberta represents the second largest domestic market of overnight visitors to BC in 2013 accounting for 19% of the Canadian visitor volume and 27% of Canadian visitor expenditures. Visitors from other parts of Canada account for only 7% of the total domestic market, with the bulk of that coming from Ontario and the Prairies. These two markets account for a much higher proportion of spending (13.9%) than they do volume. In 2013 Ontario represented 11% of spending (versus only 4% of volume) of the domestic market, while the Prairies accounted for 3% of spending. Combined, Alberta and BC represent 92% of the Canadian visitor volume to British Columbia and 82% of revenues in 2013.

Figure Share of Domestic Visitor Volume and Expenditures, 2013

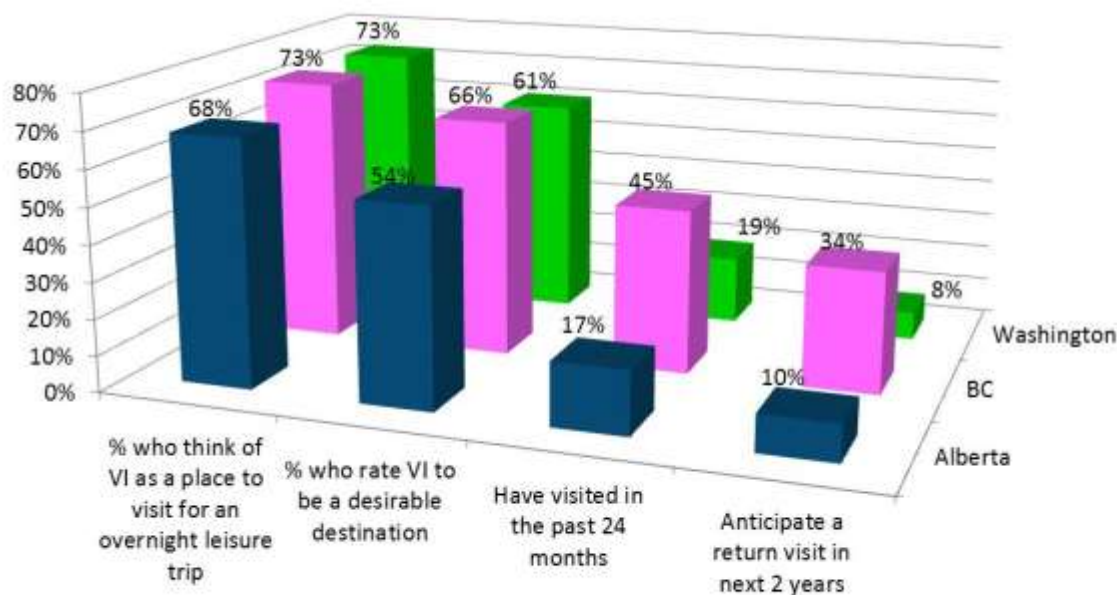


Source: Destination BC, 2015, *The Value of Tourism in British Columbia: Trends from 2003 – 2013*.

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The potential of the short haul market

On Vancouver Island tourism contributes over \$1.7 billion to the Island's economy²³. Much of this economic value is generated by short haul markets, and they remain the best prospects for the region. In late 2014 TVI commissioned research in the near-in markets of Alberta, BC, and Washington and the research was conducted by Oraclepoll²⁴. The graphic below is based on an analysis of the data presented in the report. Each column represents a percentage of the total sample population in the three markets.



Further research on the short-haul consumer market to BC is available from Destination BC and can be found in the publication entitled *Short-Haul Consumer Research (Summary April 2015)*²⁵. This report concludes with a number of recommendations for attracting short-haul consumers to destinations in BC – recommendations that are applicable to Sayward:

1. Appeal to the emotional drivers to inspire action.
2. Market to the desired experience and capitalize on the unique appeal of destinations.
3. Create fans from iconic experiences to encourage repeat visits and word-of-mouth recommendations.
4. Consider shared desired experiences in identifying potential opportunities for collaboration between cooperatives.

²³ Tourism Vancouver Island: <http://valueoftourism.ca/economics-of-tourism/real-numbers-real-impact/>

²⁴ Oraclepoll Research, January 2015, *Tourism Vancouver Island Survey Report* – <http://www.tourismvi.ca/wp-content/uploads/2015/03/Final-Public-Polling-Report.pdf>

²⁵ <http://www.destinationbc.ca/getattachment/Research/Research-by-Market/North-America/Short-Haul-Consumer-Research-Summary.pdf.aspx>

Appendix B – Understanding the Market Segments

The following **global** profiles are reproduced from Destination Canada’s *EQ Profiles* (2013).

- The **CULTURAL EXPLORER** – *is an avid traveller who values learning and discovery while travelling. They don’t want to feel like a “tourist,” preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules.*
- The **AUTHENTIC EXPERIENCER** – *is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see & when they see it.*

	CULTURAL EXPLORERS	AUTHENTIC EXPERIENCERS
Social Values – <u>top</u> defining values	<p>Importance of Spontaneity: They enjoy an element of surprise and welcome unexpected circumstances that enrich their lives.</p> <p>Cultural Sampling: They believe that other cultures have a lot to teach them.</p> <p>Adaptability to Complexity: They are not threatened by the changes and complexities of society. In fact, they embrace complexity as a learning experience and a source of opportunity.</p> <p>Pursuit of Novelty: Trying out new things is thrilling!</p> <p>Personal Control: They feel in control of their lives and not afraid to take on moderate risk if it means they can learn something new.</p> <p>Personal Escape: They long for that which is beyond the practical and they want to be transported from their everyday life.</p> <p>Personal Challenge: They set difficult personal goals for themselves at work and at play and will finish what they start.</p>	<p>Personal Control: They focus on maintaining a sense of autonomy and self-direction in their lives. Many are retired, with time to do the things they want to do.</p> <p>Importance of Spontaneity: They enjoy surprises and the unexpected – they will welcome those that help them learn more about themselves and the world.</p> <p>Culture Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.</p> <p>Everyday Ethics: They feel it’s important to be responsible, upstanding citizens.</p> <p>Skepticism towards Advertising: Their tendency to question authority extends to commercials trying to sell something. They believe that individuals are responsible for their own decisions.</p> <p>Ecological Concern: They are concerned about the health of the planet and what that means to future generations.</p>
Social Values – <u>bottom</u> defining values	<p>Confidence in Big Business: Their tendency to reject authority leads them to question those in leadership positions, including big businesses which they do not believe have better quality simply because they are larger/better known.</p> <p>Conformity to Norms: They like to be unique, different from others and love to share their ideas and creativity.</p> <p>Ostentatious Consumption: They are not highly materialistic and are offended by ostentatious consumption.</p>	<p>Joy of Consumption: Although they are relatively affluent and confident financially, they are not avid consumers.</p> <p>Living Virtually: They want to connect with the real world authentically and are not content to do so by way of TV, computers or the internet.</p> <p>Importance of Brand: They care little about brands – but they’re not afraid to pay for quality if it matches their values.</p>
Travel Values – <u>will seek</u>	<p>Constant Travel: Always excited about the next trip.</p> <p>Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.</p> <p>The Beauty of Nature: Will choose destinations that provide opportunities to experience natural</p>	<p>Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures, of the places they visit.</p> <p>To Understand Cultural Differences: While they are not high on the trend Comparison Travel, they love to observe the difference between destinations.</p>

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	CULTURAL EXPLORERS	AUTHENTIC EXPERIENCERS
	<p>beauty.</p> <p>Fun, Shared Experiences: Travel is a journey, not the destination, and is best experienced with like-minded companions who like to have fun while learning.</p> <p>Going with the Flow: Prefer a free and spontaneous approach to seeing the sights.</p>	
Travel Values – <u>will avoid</u>	<p>Luxury/Comfort-seeking: This EQ type seeks an authentic experience and doesn't need to be pampered in commercial hotels and have experiences just like home.</p> <p>Group/Checklist Travel: Prefer not to be constrained to "tourist" schedules or destinations, and will chart their own courses.</p>	<p>Hedonistic Rejuvenation/Comfort-seeking: This EQ type does not shy away from living like the locals do. They like to be in control while they vacation, and don't need to be pampered and have everything taken care of for them.</p> <p>Escape: These travelers do not feel overwhelmed by life. Travel is not about escape for them, but about personal development and learning instead.</p>
Top 10 most appealing activities	<ol style="list-style-type: none"> 1. Marine life viewing – 81% 2. Wildlife viewing – land-based animals & bird watching – 78% 3. Dining at restaurants offering local ingredients – 78% 4. Visiting national, provincial/state parks to view wildlife etc. – 77% 5. Visiting well-known natural wonders – 76% 6. Visiting small towns and villages – 76% 7. Visiting national, provincial/state parks to visit interpretive centres etc. – 75% 8. Visiting well-known historic sites and buildings – 73% 9. Interacting with locals – 73% 10. Visiting world heritage sites – 72% 	<ol style="list-style-type: none"> 1. Marine life viewing – 80% 2. Wildlife viewing – land-based animals & bird watching – 78% 3. Dining at restaurants offering local ingredients – 74% 4. Seeing beautiful coastlines, beaches – 74% 5. Visiting well-known historic sites and buildings – 73% 6. Visiting national, provincial/state parks to view wildlife etc. – 72% 7. Visiting small towns and villages – 72% 8. Visiting well-known natural wonders – 72% 9. Visiting national, provincial/state parks to visit interpretive centres etc. – 71% 10. Viewing Northern and Southern lights – 67%
Experience Appeal	<p>Cultural Explorers are more likely than other travellers to be interested in:</p> <ol style="list-style-type: none"> 1. Nature Observation Activities 2. Exhibits, Architecture, Historic Sites/Buildings, Museums 3. Sightseeing Activities 4. Accommodation-related Activities 5. Water-based Outdoor Activities 6. Hands-on Learning Activities 7. Festivals, Events & Spectator Sports 8. Outdoor/Nature Sports & Activities 9. Winter Outdoor Activities <p>Cultural Explorers are also interested in:</p> <ol style="list-style-type: none"> 1. Shopping, Dining and Other Food-related Activities 2. Entertainment, Performing Arts and Amusement Parks 3. Cruises & Touring 	<p>Authentic Experiencers are more likely than other travellers to be interested in:</p> <ol style="list-style-type: none"> 1. Exhibits, Architecture, Historic Sites/Buildings, Museums <p>Authentic Experiencers are also interested in:</p> <ol style="list-style-type: none"> 1. Nature Observation Activities 2. Sightseeing Activities 3. Shopping, Dining and Other Food-related Activities 4. Entertainment, Performing Arts and Amusement Parks 5. Accommodation-related Activities 6. Cruises & Touring 7. Water-based Outdoor Activities 8. Hands-on Learning Activities 9. Festivals, Events & Spectator Sports 10. Outdoor/Nature Sports & Activities 11. Winter Outdoor Activities

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Appendix C – Acronyms and Definitions

AGM – Annual General Meeting

CTF – **Community Tourism Foundations**: Destination British Columbia works with the Province's Regional Destination Marketing and Management Organizations (RDMOs) and communities throughout the province on tourism development and planning initiatives. The [Community Tourism Foundations](#) program is designed for communities seeking assistance in short and long-term destination planning. By providing a range of tools, proven resources and customized destination and market development assistance, the program accommodates the needs of communities in various stages of tourism development.

CRR – Campbell River Region

Destination Canada – formerly known as the Canadian Tourism Commission (CTC): the CTC is Canada's national tourism marketing organization. It is a federal Crown corporation that has been mandated to sustain a vibrant and profitable tourism industry by supporting a cooperative relationship between the private sector and the governments of Canada, the provinces and the territories. The CTC works with its partners to promote Canada's *extraordinary experiences* in eleven countries around the world: the Americas (Mexico and Brazil), Europe (the United Kingdom (UK), Germany and France), Asia (China, India, Japan and South Korea) and Australia. The CTC also conduct business events sales activities in the United States. The CTC was renamed as **Destination Canada** in May 2015.

EQ – **Explorer Quotient**[®]: Destination Canada's market segmentation system based on the science of psychographics. Market segmentation is a marketing analysis technique that allows businesses to group customers into "segments" based on given criteria such as demographics, geography or even psychological factors (attitudes, beliefs and values). This approach allows tourism businesses to identify and understand those segments that are most likely to buy their products, to then better align their marketing and product development efforts accordingly.

Psychographics is an evolution of the traditional field of demographics. Instead of just breaking travellers into groups based on age, income, gender, family status or education level – all of which are useful information – psychographics looks deeper at people's social values and views of the world.

EQ breaks each geographic market down into different psychographic groups, called Explorer Types. Each type is identified by particular characteristics stemming from social and travel values, travel motivations and behaviours. Destination Canada selected Canada's best Explorer Type prospects based on their affinity for the **Canada. Keep Exploring** brand, as well as love of travel, potential for being high-yield customers and propensity for word-of-mouth advocacy. This resulted in the selection of target types in each of Destination Canada's primary geographic markets. (Source: Destination Canada, December 2012, *EQ Profiles*)

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MRDT – Municipal and Regional District Tax

RDMO – Regional Destination Management Organization

OCP – Official Community Plan

TVI – Tourism Vancouver Island

VC – Visitor Centre

VIN – Vancouver Island North