

SUPER, NATURAL[®]
BRITISH COLUMBIA
CANADA

GAINING THE EDGE

A Five-year Strategy for Tourism
in British Columbia
2012 - 2016



**THE BC
JOBS PLAN**





GAINING THE EDGE

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A NEW FOCUS FOR TOURISM

Message from the Premier



When we released the BC Jobs Plan, we committed to sector specific strategies to help guide our work. As part of the BC Jobs Plan, I'm pleased to present the first of those strategies – a new five-year tourism strategy called 'Gaining the Edge.'

This strategy capitalizes on the world-wide exposure our province received from the 2010 Olympic and Paralympic Games. It will help government, industry stakeholders and communities work together to deliver the best results for the tourism sector over the next five years and beyond.

When it comes to tourism, who we are matters. The pride and passion of people in this industry breathes life into the landscape for visitors and their skills and knowledge enhance our global visibility and reputation.

By improving coordination of tourism activities, shifting provincial marketing efforts to focus on high potential products, and actively pursuing emerging markets, we can support the sector to increase revenue and visitor numbers, and create jobs for families across British Columbia.

The Honourable Christy Clark
Premier of British Columbia

Message from the Minister



British Columbia's awe-inspiring natural beauty, together with our province's diversity and the warmth of our people make tourism in BC the success that it is today.

Tourism is identified in *Canada Starts Here: The BC Jobs Plan* as a sector that will drive economic growth throughout BC. Seizing this opportunity will require discipline, focus, innovation and a strengthened partnership between tourism businesses, organizations and all levels of government.

This strategy focuses on tourism products and markets that will allow BC to inspire and connect with an even greater number of visitors from around the world. The result will be increased economic growth, new business opportunities and job creation across the province.

The benefits of this success will extend far beyond the sector, as tourism enhances our province's reputation as a premier destination to visit, invest, work and live.

As Minister responsible for Tourism, I look forward to working with tourism partners throughout the province to achieve these exciting goals.

The Honourable Pat Bell
Minister of Jobs, Tourism and Innovation



Our vision is of a tourism sector that will create jobs, opportunities and prosperity for British Columbians in every region of the province.

BC TOURISM STRATEGY 2012-2016: EXECUTIVE SUMMARY

A STRONG RECORD OF SUCCESS

As one of British Columbia's leading economic sectors, tourism benefits our province in many ways. Its economic benefits extend into every region of the province. In 2010, tourism employed 127,000 British Columbians, generated over \$13.4 billion in revenue and contributed over \$1.2 billion to provincial government revenues.

During the last decade, tourism in BC grew more rapidly than our economy as a whole, despite challenging international events. With our province's exceptional diversity of places, people and experiences, we are uniquely placed to satisfy the increasing demand for high quality, authentic experiences.

To capitalize on this opportunity, the government of British Columbia has identified tourism as a key element of *Canada Starts Here: The BC Jobs Plan*.

GAINING THE EDGE

Our vision is of a tourism sector that will create jobs, opportunities and prosperity for British Columbians in every region of the province. To achieve this vision, we will look to grow in key emerging markets and further concentrate our efforts where we have a competitive advantage.

TRENDS, OPPORTUNITIES & CHALLENGES

The development of this strategy has been guided by careful attention to tourism trends such as the emergence of new competing destinations, increasing demand from retiring 'Baby Boomers' and residents of emerging economies. It accounts for consumer shifts that favour shorter, less expensive trips and constantly changing technology.

This strategy focuses on opportunities such as British Columbia's strategic location relative to Asia, our diverse landscapes and experiences and our excellent infrastructure.

The strategy responds to challenges such as the need for improved air service, it acknowledges the challenge of a fluctuating Canadian dollar and consumer sensitivity to travel costs. It responds to increasing worldwide competition and issues such as the need for timely land-use decisions and effective responses to potential future labour shortages.

FIVE-YEAR STRATEGY

This strategy is designed to increase visitor volume, revenue, and employment. The target is to achieve sector revenue of \$18 billion by 2016 (5 per cent growth per year).

We will achieve our goals through action in four key areas:

1. Leadership through partnership and coordination
2. Focused marketing
3. World class visitor experiences
4. Removing barriers to growth.

The new BC Tourism Strategy identifies priority products and markets where BC has a competitive advantage:

Key Tourism Products

Touring vacations, city experiences, skiing/snowboarding, Aboriginal tourism, conventions and meetings and outdoor adventure/eco-tourism. Regionally important products will be promoted primarily by regional, community and product sector organizations.

Key Markets

California, Ontario, Japan, South Korea, Australia, Germany, United Kingdom and emerging markets China, India, Mexico. Regions, communities, cities and sector organizations will lead in Alberta, Washington State and the BC resident market.

LEADERSHIP THROUGH PARTNERSHIP & COORDINATION

Tourism's ability to fulfill its substantial economic and employment potential depends on marketing partnerships at all levels. To build outstanding marketing partnerships, we will:

- Work to create a market-driven regime, to solidify and strengthen BC's competitive advantage.
- Work with industry to coordinate marketing roles and responsibilities to reduce overlap and enhance impact.

FOCUSED MARKETING

Through strategic marketing partnerships, coordinated campaigns and innovative use of emerging marketing tools, BC tourism businesses will reach new customers and drive long term growth. To strengthen marketing efforts, we will:

- Build upon the *Super, Natural British Columbia*® brand as a travel motivator.

- Deploy a combination of media relations, social media, travel trade and consumer direct marketing as appropriate by target market.
- Upgrade and refresh the **HelloBC.com** network of international websites and launch new mobile sites and applications.
- Promote tourism in BC's rural areas through tools such as online programs.
- Work with regions, communities, cities and product sectors in marketing to nearby markets (BC resident, Alberta, Washington State).

WORLD CLASS VISITOR EXPERIENCES

British Columbia possesses an exceptional mix of tourism products – from urban escapes to rugged landscapes. The warmth of our people and the quality of the service provided by communities and businesses are key to encouraging repeat visits. To build on the outstanding visitor experiences British Columbia has to offer, we will:

- Implement an action plan for developing and maintaining a sustainable network of recreation trails throughout British Columbia.
- Work with Aboriginal Tourism BC to build on the success of the Aboriginal Tourism BC Blueprint Strategy.
- Build on an outstanding system of tourism information centres by enhancing technology infrastructure throughout the province.
- Work with the tourism sector to ensure strategies are in place to address potential labour market pressures.
- Assist BC tourism businesses, local governments and communities to become market-ready by providing planning tools and supporting programs.

REMOVING BARRIERS TO INDUSTRY GROWTH

A welcoming business environment is a key ingredient for successful tourism businesses, many of which are small companies. To remove barriers and encourage tourism industry growth, we will:

- Improve the timeliness of Crown land-use decisions.
- Work to improve air access to and within BC.
- Encourage the federal government to streamline tourist visa application procedures and implement technology solutions to speed approvals and entries.



“The decades of success experienced by the tourism industry is clearly the result of its entrepreneurial spirit.”

The Honourable Pat Bell
Minister of Jobs, Tourism and Innovation



INTRODUCTION

A STRATEGY CREATED THROUGH PARTNERSHIP

A wide range of industry and government stakeholders helped develop this strategy.

Independent consultants collected, reviewed and analyzed data. Industry, government staff and cross-government committees reviewed the analysis and created the vision and priorities outlined in this strategy. Working groups made up of public and private sector participants

developed possible actions. The Minister's Council on Tourism and the Tourism Industry Association of BC provided input, as did more than 1,300 individual businesses through an industry survey.

This partnership between industry and government will continue to be the foundation for building success long into the future.





FOCUS

ON GAINING THE EDGE

During the last decade, the tourism industry grew more rapidly than the BC economy as a whole.

A STRONG RECORD OF SUCCESS

As one of British Columbia's leading economic sectors, tourism benefits our province in many ways. The sector presents the "face" of British Columbia to the world and is a major source of jobs and revenue. Through the *Super, Natural British Columbia*[®] brand, BC's social, cultural and environmental values are promoted internationally.

The economic benefits of tourism extend into every region of the province. In 2010, tourism employed 127,000 British Columbians, generated over \$13.4 billion in revenue for tourism-related businesses and contributed over \$1.2 billion to provincial government revenues.

During the last decade, tourism in BC grew more rapidly than our economy as a whole, despite challenging international events. The Vancouver 2010 Olympic and Paralympic Winter Games presented an unparalleled opportunity to showcase BC to a world-wide audience of three billion people, positioning our province for future success.

As discretionary incomes rebound across the developed world and demand for travel increases in developing countries, tourism is expected to be one of the world's fastest growing industries. With our province's exceptional diversity of places, people and experiences, we are uniquely placed to satisfy the increasing demand for high quality, authentic experiences.

To capitalize on this opportunity, the government of British Columbia has identified tourism as a key element of both the *Families First Agenda* and *Canada Starts Here: The BC Jobs Plan*. This Strategy will help the sector make an even bigger contribution to the well-being of British Columbians, providing more jobs, export income and tax revenues.

GUIDING PRINCIPLES

- The British Columbia tourism sector will continue to be a leading contributor to a thriving provincial economy.
- The tourism sector will provide jobs and benefits province-wide and through all seasons.
- British Columbia will seek out new growth opportunities for tourism, such as key emerging markets.
- British Columbia will achieve tourism growth by concentrating efforts on those products and markets where BC has a competitive advantage.
- Product and market priorities will be based on the best research and tourism market intelligence in Canada, and will accommodate the changing needs of the consumer.
- BC will be the most business-friendly jurisdiction in which to operate a tourism business in North America.
- Collaboration and partnership between national, provincial, regional and community destination marketing organizations, as well as sectors and individual tourism businesses, are key to realizing BC's competitive advantage.

¹ World Tourism Organization (UN WTO), Spring 2011; <http://www.unwto.org/facts/pub.html>

A vibrant mountain scene featuring a red cable car suspended from cables, carrying several passengers. In the foreground, a man and a woman with backpacks are hiking on a grassy ridge, looking towards the camera. The background is dominated by majestic, snow-dusted mountain peaks under a clear blue sky. A single evergreen tree stands on the right side of the ridge.

*Consumers cite the natural environment, the warmth of the people,
the diversity of places and activities, and the spectacular beauty
to be the greatest motivators in choosing a trip to BC.*

UNDERSTANDING THE TOURISM OPPORTUNITY

Unlike many other consumer purchases, tourism consumers buy a destination “experience” comprised of places to visit, places to stay and things to do. As a leading vacation destination, British Columbia’s assets are numerous, with consumers citing the natural environment, such as Provincial Parks, the warmth of the people, the diversity of places and activities, and the spectacular beauty to be the greatest motivators in choosing a trip to BC. This fully supports **British Columbia’s competitive advantage of offering a diversity of experiences against a backdrop of awe-inspiring natural beauty.**

To succeed as a destination requires single-minded focus, strong leadership and collaboration. The role of government is to continue to lead and work closely with tourism businesses, communities, tourism marketing organizations and all levels of government to realize the full potential of tourism in this province.



The Vacation Planning and Purchase Process



Travel is not typically an impulse purchase – for many, a trip to British Columbia, or to a new part of BC, is the culmination of a dream and, potentially, the trip of a lifetime. Inspired to visit many destinations, consumers go through a complex planning and purchase process to narrow the list of potential destinations, gather information, make a decision, and finally purchase a vacation. Throughout the trip, consumers continue to make decisions about daily activities such as dining and attractions, as well as evaluating their overall vacation experience. Through social media, they

can share those experiences and opinions in real time with their friends and family. The power of social media to enhance and leverage the positive experiences of travellers to attract new visitors, as well as encourage return visits, is huge. This underscores the importance of connecting with consumers at every touchpoint – before, during and after their trip.

To maximize the benefits of tourism in BC, the Tourism Strategy addresses, and includes actions to influence, each stage of the vacation planning and purchase process.

Government’s primary tools for supporting the sector include policy development, regulation and marketing. Innovative marketing activities will increase awareness of, and interest in, BC as a travel destination. Emerging technologies are key to providing comprehensive and timely travel planning information, increasing the likelihood that visitors will stay longer, with increased spending while they are here. By ensuring an exceptional experience, visitors are more likely to return, as well as recommend travel to BC.



STRATEGIC CONTEXT

TRENDS

As demand for travel grows, high-quality and authentic experiences will be sought by travellers around the globe.

Many destinations – Countries and regions that previously attracted few visitors are now competing actively. These include rainforest destinations such as Costa Rica and previously closed countries such as China and nations of the former Soviet Union.

Increased demand – Wealthier travellers, emerging economies and an expanding Asian middle class will contribute to increased demand for tourism. Also, retiring ‘Baby Boomers,’ the largest population group in western countries, will take advantage of their wealth and free time to travel more.

Economic recovery – Slow and inconsistent recovery from recent global economic crises will lead to more conservative choices for travel in the short term, resulting in shorter, less expensive trips.

Growing use of technology – Consumers’ use of technology is enabling them to make better-informed judgements about purchases and serve as “go-to” authorities for each other about the value and reliability of different options.

OPPORTUNITIES

With its awe-inspiring scenery, diversity of experiences, strategic geographic location and infrastructure, BC offers a unique set of opportunities.

Diverse landscapes and experiences – These attributes, coupled with the warmth of British Columbians, uniquely position BC. The *Super, Natural British Columbia*® brand has made good use of these attributes.

Accessibility to Asia – As “Canada’s Asia Pacific Gateway”, British Columbia is the face of Canada to Asia’s growing markets with their huge visitor potential.

Outstanding infrastructure – Provincial, federal and local governments have made major investments in roads, bridges, airports, border crossings, ports and other infrastructure over the last 10 years, enhancing tourism.

World-class tourism products – British Columbia has developed and enhanced many tourism products such as skiing, touring, conventions and city visits, which motivate travellers to visit British Columbia. Outstanding “niche” products, such as wine touring, heli-skiing, bear viewing and heritage attractions, motivate smaller numbers, but higher spending visitors.

Distinct Aboriginal tourism experiences – The development of Aboriginal cultural tourism provides social, cultural and economic benefits to BC’s Aboriginal communities.

STRATEGIC CONTEXT

CHALLENGES

While British Columbia's tourism sector has many strengths, there are a number of overarching considerations and challenges that influenced the development of this Tourism Strategy.

Improving air access – British Columbia will continue to work with the federal government to ensure travellers have direct, convenient and affordable air access to British Columbia.

Costs and the Canadian dollar – Together with BC's relatively high cost as a destination, a high dollar presents challenges to increasing tourism. In addition to developing policies that can help tourism businesses compete, we must promote the compelling value of British Columbia as a destination.

Increasing worldwide competition – With many other destinations working hard to attract travellers, we need to provide increased strategic focus on BC's tourism advantages and use cost-effective and innovative tools to maintain market impact.

Crown land tenure – BC's tourism's potential could be enhanced through more timely land-use decisions.

Border security and visa procedures – Security requirements have increased processing times at border entry points, leading to delays for visitors.

Labour supply management – Strong growth of the tourism sector combined with turnover and retirements could lead to future labour shortages unless proactive strategies are developed and implemented.



SUPER, NATURAL®
BRITISH COLUMBIA
CANADA

The Power of the *Super, Natural* British Columbia Brand

For over thirty years, the *Super, Natural British Columbia* brand has influenced perceptions and inspired millions of people to visit British Columbia. By focusing on the attributes of BC that consumers find most meaningful and motivating – the awe-inspiring natural beauty, the diversity of landscapes and experiences together with the warmth of the people, the brand continues to resonate with consumers worldwide, and is even more relevant now than when it was first introduced.

The *Super, Natural British Columbia* branding is the foundation for all communications related to promoting tourism in British Columbia around the world. Whether through traditional or social media, the messaging is consistent and defines what BC stands for in the consumer's mind, and how we are distinguished from the competition.

As a brand, it evokes an emotional response; it stirs the imagination of prospective travellers and separates BC from other destinations. *Super, Natural British Columbia* truly continues to be one of BC's greatest assets.

RURAL TOURISM OPPORTUNITIES

Many of the defining elements of the Super, Natural® British Columbia brand are found throughout rural BC.



GAINING THE EDGE ACROSS THE PROVINCE

For the tourism sector in British Columbia to build on a base of \$13.4 billion in revenue, growth needs to be achieved province-wide. With over 50 types of tourism products found in six distinct regions and communities province-wide, tourism epitomizes how small and medium-sized businesses contribute to the economy.

KEY FACTS

- 17,943 tourism-related businesses province-wide
- 77% of all tourism businesses have fewer than 20 employees
- 56% have fewer than 10 employees
- 26% of tourism businesses are located in regions with a higher proportion of rural communities (Thompson Okanagan, Cariboo Chilcotin Coast, Northern British Columbia and the Kootenay Rockies regions)
- 43% of all tourism businesses are outside the Greater Vancouver area.



RURAL TOURISM GROWTH THROUGH PARTNERSHIP & PROGRAMS

The Ministry of Jobs, Tourism and Innovation (JTI) currently works with the province's six Regional Destination Marketing Organizations (RDMOs) and communities to develop tourism programs throughout the province. This will be the foundation of support for tourism in rural British Columbia going forward. The richness of tourism experiences found throughout the regions, including many distinct niche products, are integral to the diversity that makes up BC's competitive advantage.

Rural communities and regions are fundamental to the social and economic well-being of British Columbia. JTI connects rural communities to provincial government services, resources and program funding information to assist in achieving their economic and community development goals. JTI and partner ministries also endeavour to address important policy and regulatory issues.

There is also support specifically for rural tourism through two public/private partnership programs called Tourism Partners and Community Tourism Opportunities. These cooperative marketing programs provide matching funding annually to support both tourism operator and community-driven initiatives consisting of approximately 600 distinct projects across the province each year.

The provincial tourism marketing website, **HelloBC.com**, reaches over 7 million consumers annually, providing rural communities with exposure that they would be unable to generate on their own. The Ministry also provides access to market research that provides valuable information to tourism operators to develop their long-term business plans and assist in their success.



Implementing the Strategy will stimulate growth in BC's tourism sector, with increasing visitation, revenue and employment.

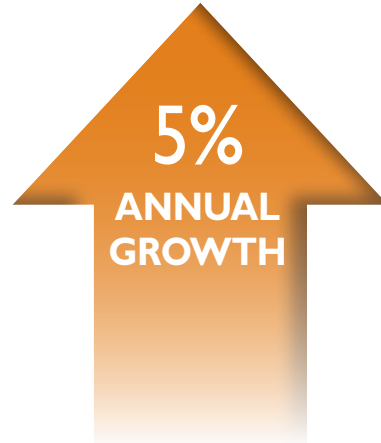


TARGETS FOR SUCCESS

This Strategy is designed to increase visitor volume, revenue, and employment.

The five-year targets are:

- Sector revenue of \$18 billion by 2016 (5% growth per year)
- Annual increases in sector revenue and/or tourism sector employment in every tourism region.



As a result of broad stakeholder input and comprehensive market research, four key areas form the foundation of the Tourism Strategy:

How We're Going To Do It

1. Leadership Through Partnership and Coordination
2. Strategic Marketing
3. World Class Visitor Experiences
4. Removing Barriers to Sector Growth

Success will be achieved by promoting priority tourism products in key markets, and by bringing together partners to maximize efficiency and effectiveness.



GAINING THE EDGE: BRITISH COLUMBIA'S PRIORITY TOURISM PRODUCTS

Over 50 products were evaluated against the following criteria: importance to British Columbia's tourism industry, degree to which they inspire visitors to choose British Columbia, long-term growth potential, and whether existing barriers to growth can be addressed.

BC'S PRODUCT FOCUS

These priority products will be central to the new BC Tourism Strategy providing a range of visitor experiences that define BC's competitive advantage.

- Touring vacations
- City experiences
- Outdoor adventure/eco-tourism
- Aboriginal tourism
- Conventions and meetings
- Downhill skiing/snowboarding.

Regionally important products (such as golfing, wine and cuisine, fishing and hunting among others) will be promoted primarily by regional, community and product sector organizations.



PRODUCT/MARKET MATCH

MARKETS	BC	Alberta	Ontario	Washington	California	Mexico	Japan	South Korea	China	Australia	Germany	UK
PRODUCTS												
Touring Vacations	■	■	■	■			■	■	■	■	■	■
City experiences	■		■	■	■	■	■	■	■	■	■	■
Outdoor adventure/eco-tourism	■	■	■	■	■			■		■	■	■
Aboriginal tourism	■	■	■		■						■	
Conventions and meetings	■	■	■	■	■							
Downhill skiing/snowboarding	■	■	■	■	■	■		■		■	■	■

GAINING THE EDGE: BRITISH COLUMBIA'S TARGET TOURISM MARKETS

Over 40 markets were evaluated against the following criteria: interest in the priority tourism products, current importance to BC's tourism industry, long-term growth potential, and whether existing barriers to growth can be addressed.

BC'S MARKET FOCUS

These markets will be the focus of BC's new Tourism Strategy, providing the greatest benefit for British Columbians.

Top Priority Markets

Lead: Provincial

High Revenue/High Spend Per Visitor

- Ontario
- California
- UK
- Australia
- Germany
- Japan
- South Korea

Emerging Markets with Long-term Potential

Lead: Provincial

- China
- India
- Mexico

Nearby Markets

Lead: Regions, Communities and/or Sectors

High Volume/Strong Repeat Visitation

- British Columbia
- Alberta
- Washington State



Data to support this analysis were drawn from a number of sources, such as the Travel Survey of Residents of Canada, International Travel Survey, and Global Tourism Watch, as well as qualitative assessments.

Strengthened partnerships will enable the tourism sector to compete more effectively and overcome challenges.



BC TOURISM STRATEGY: FOUR THEMES FOR SUCCESS

1 LEADERSHIP THROUGH PARTNERSHIP AND COORDINATION

British Columbia tourism businesses have exceptional products and experiences to offer travellers. Marketing partnerships at the federal, provincial, regional and community level, together with sectors, are necessary for tourism to achieve its full economic growth and employment potential. To maximize impact, all efforts need to be coordinated and integrated.

The province plays an important role in representing the myriad of communities, experiences and businesses in markets where they do not have the individual resources to sustain a market presence. Particularly in overseas markets, where the image of Canada is likely most relevant and motivating to consumers, the province takes the lead in working with the Canadian

Tourism Commission. In other longer haul markets, such as California, the province brings together the destinations and products to portray the breadth and depth of British Columbia experiences available for potential consumers. In nearby markets, consumers are typically much more familiar with the specific communities and products. In these markets, the individual businesses, regions and communities work together to provide the more detailed information consumers require.

A NEW MODEL FOR TOURISM PARTNERSHIP AND COORDINATION

To achieve sustained market impact, effective strategic marketing requires multi-year horizons. Stable long-term funding for destination marketing organizations at all levels is among the priorities of the Tourism Strategy.

A new multi-faceted tourism marketing partnership including provincial, regional and community marketing organizations, with clear roles and accountabilities, will ensure maximum efficiency.

ACTIONS

Create a market-driven regime to solidify and strengthen BC's competitive advantage.

- Develop a stable and predictable funding mechanism for tourism.
- For 2012/13, complete an enhanced accountability framework for the Municipal and Regional District Hotel Room Tax (the "Additional Hotel Room Tax") which will allow for better coordination and improved accountability.

Work with the tourism industry to coordinate marketing roles and responsibilities to reduce overlap and enhance impact.

- Create, lead and maintain a collaborative, integrated planning model among tourism marketing organizations to ensure strategic alignment and increase effectiveness.
- Work with destination marketing organizations, business operators, communities and sectors to ensure industry development programs are available.
- Develop best practices and key performance indicators to measure and monitor outcomes, creating transparency and accountability in the system.



To gain the competitive advantage on the world stage, British Columbia must continue to offer exceptional tourism products and experiences, presented to the consumer in an inspiring and compelling fashion.

BC TOURISM STRATEGY: FOUR THEMES FOR SUCCESS

2 FOCUSED MARKETING

To gain the competitive advantage on the world stage, British Columbia must continue to offer exceptional tourism products and experiences, presented to the consumer in an inspiring and compelling fashion. Through strategic marketing partnerships, coordinated campaigns and innovative use of emerging marketing tools, British Columbia's tourism businesses will reach new customers and drive long term growth in the industry.

A NEW APPROACH TO MARKETING BRITISH COLUMBIA

Understanding BC's target consumers is essential to the execution of solid marketing strategies. In all markets, we are seeking to attract frequent travellers – typically those with above average income and education who are looking for experiences which enrich and re-energize. By applying resources to markets and consumer segments where BC's tourism products resonate strongly, we will be more successful in reaching both new and repeat visitors.

The overarching approach to achieving growth is to address consumer needs based on their stage in trip planning – from awareness to interest, then purchase and repeat visitation. Fundamental to this is the concept of connecting consumers to the product of their choice through the channel of their choice. Increasingly, consumers' channel of choice is online; resources will therefore continue to be invested in emerging marketing tools and technology.



TOURING VACATIONS

A DISTINCT ADVANTAGE FOR BC

With over 50 diverse tourism product offerings, there are countless opportunities for visitors to experience different activities in different regions of the province. Touring encompasses the range of experiences visitors participate in while travelling throughout the province, from sightseeing and visiting a heritage attraction to cycling or wine tasting. Whether driving by car or RV, or seeing the province on a motorcoach tour, a large proportion of visitors to BC participate in a touring vacation.

While touring the province, visitors become familiar with the diversity of landscapes, people and tourism products which make BC unique. Research studies reinforce British Columbia's strategic advantage as a touring destination with travellers citing BC's scenery and outdoor recreation opportunities as the primary reason for visiting BC. Promotion of touring itineraries throughout the province takes many forms, including some of the most popular content on *HelloBC.com*, and fulfills a key goal of this Strategy: to ensure tourism growth across all of British Columbia.



2 FOCUSED MARKETING

TECHNOLOGY AND TOURISM

As a result of strategic investment in online resources, the current provincial e-marketing system provides the flexibility to deliver information and resources in the way people need them.

To date, the focus has been on developing robust websites. The shift now is to mobile sites and applications, as mobile devices become the most common form of hardware for accessing digital content. **Regardless of which path technology follows and which devices potential visitors embrace, from smart phones to iPads, digital content will be provided to the right people, at the right time in the right context.**

Social media becomes mainstream

Twitter, Facebook, YouTube and Digg, among others, have created new worlds of online participation. Sharing ideas, recommendations and experiences on the Internet is becoming commonplace. The opportunities for tourism marketers to engage with consumers through social media are numerous: **starting with joining conversations to raising awareness about British Columbia and carrying through to encouraging consumers to share their great experiences in BC after they return home.** To meet the popularity and diversity of communication needs, a provincial social media plan is in place. This approach is designed to make the most of direct contact with consumers, tourism businesses, media, and industry partners. In the short-term, the plan supports current business needs and social channels. In the longer-term social media will become standard practice, and will blend official marketing messages and consumer recommendations to create the strongest endorsement yet of British Columbia as a leading destination in the global tourism market.



2 FOCUSED MARKETING

ACTIONS

Build upon the *Super, Natural British Columbia* brand as a travel motivator.

- Invest in digital assets (still and video) which support the brand.
- Bring the brand to life through social media which amplifies the voice of visitors, residents and industry as advocates for the BC tourism experience.

Harness the power of emerging technology to deliver timely, accurate travel and product information regardless of location or device.

- Upgrade and refresh the **HelloBC.com** network of international websites, as well as the industry interface, TourismBC.net.
- Launch new mobile sites and applications.
- Further disseminate digital information through other channels and enhance breadth of information by aggregating third party information.

Inspire and motivate visitors by showcasing high potential tourism products where BC has competitive strength.

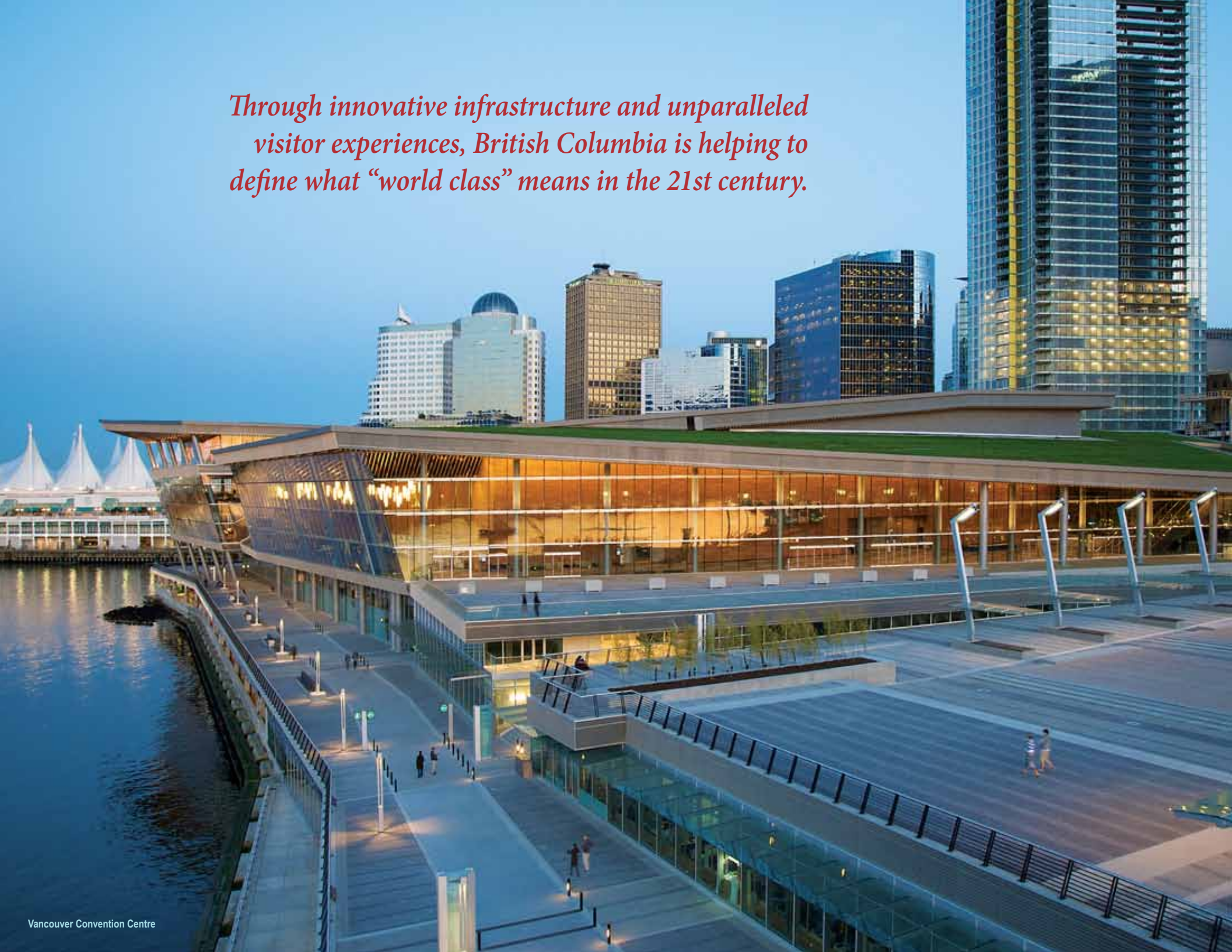
- Deploy a combination of media relations, social media, travel trade and consumer direct marketing, with mix and emphasis varying by market.
- Use cost effective tools such as online channels to enable consumers to easily access the full spectrum of tourism product experiences throughout BC.
- Develop a new action plan for marketing meetings and conventions in partnership with communities.

Shift provincial marketing efforts to focus on high potential products and markets.

- Create marketing campaigns to motivate visits from priority markets (California, Ontario, UK, Australia, Japan, Germany, South Korea).
- In partnership with the Canadian Tourism Commission (CTC), launch consumer and trade campaigns to capitalize on Canada's Approved Destination Status in China, and expand market reach to the growing middle class.
- Develop and implement a market entry plan for India.
- Continue to work with the CTC to expand visitation from Mexico.
- Promote tourism in BC's rural areas through online programs which enable small businesses to more easily reach potential visitors.
- Support marketing by regions, communities and cities to nearby markets (BC Resident, Alberta, Washington State).



Through innovative infrastructure and unparalleled visitor experiences, British Columbia is helping to define what “world class” means in the 21st century.



BC TOURISM STRATEGY: FOUR THEMES FOR SUCCESS

3 WORLD CLASS VISITOR EXPERIENCES

British Columbia possesses an exceptional mix of tourism products – from urban escapes to rugged landscapes – with outstanding opportunities for nature-based tourism, as well as cultural and heritage events and activities. The warmth of the people and the quality of the service provided by these communities and businesses are the foundation of world class visitor experiences that encourage repeat visits to BC.

PUBLIC INFRASTRUCTURE

BC offers tremendous publicly-owned infrastructure for tourism experiences, including best-in-class meeting and sport facilities, heritage sites, national and provincial parks, recreation sites, and trails.

ACTIONS

- Market tourism uses of provincial infrastructure and Crown assets, consistent with the focus on key products such as touring and outdoor adventure/eco-tourism.
- Implement “A Trails Strategy for British Columbia” – an action plan for developing and maintaining a sustainable, world-renowned network of recreation trails for hikers, cyclists, equestrians, cross-country skiers, snowmobilers and summer motorized users.

COMMUNITY AND PRODUCT DEVELOPMENT

There are thousands of businesses offering tourism experiences in communities throughout BC that assist in building British Columbia’s potential.

ACTIONS

- Assist more BC tourism businesses, local governments and communities to become market ready by providing planning tools and support for programs.
- Lead in providing high quality, accessible, timely, and relevant research and market intelligence to support sector growth and influence future planning.
- Continue to work with Aboriginal Tourism BC in the delivery of the AtBC Blueprint Strategy.



Carmanah Walbran Provincial Park

BRITISH COLUMBIA’S PROVINCIAL PARKS

LEADING TOURISM IN BC FOR 100 YEARS

Beginning with Strathcona Provincial Park as the first designated BC Provincial Park in 1911, a century later British Columbia has grown to have one of the largest park systems in the world. Today, BC Parks constitute about 11 per cent (approximately 10.5 million hectares) of the provincial land base. With a dual mandate to protect natural environments and provide outdoor recreation, BC Parks are one of the greatest resources this province has, and truly define the *Super, Natural British Columbia* experience.

As the number of parks has grown over the past century, so has the number of visitors who enjoy them. Memories of travellers from around the world, once shared through traditional postcards, have been replaced by real time comments and pictures featured on YouTube and Facebook. The power of this user-generated content is critical to building future success, as online viewers are inspired to experience this vast network of mountains, rivers, lakes and beaches that can only be found in BC.

The appeal of BC Parks as a motivator for tourism cannot be understated. Over 80% of travellers from key international markets identified “visiting parks and protected areas” as a highlight of a visit to Canada, and national and provincial parks were one of the top three reasons for visiting British Columbia for key North American travellers (*Global Tourism Watch*). This appreciation is felt equally by native British Columbians, with nearly 90% of British Columbians having used a provincial park at some time, and approximately 60% of residents using a provincial park every year.

3 WORLD CLASS VISITOR EXPERIENCES

FOCUS ON ABORIGINAL TOURISM

The Aboriginal Tourism Association of British Columbia (AtBC) is a non-profit, stakeholder-based organization that is committed to growing and promoting a sustainable, authentic, culturally rich Aboriginal tourism industry. AtBC works closely with the Ministry of Jobs, Tourism and Innovation as well as tourism, business, education and government organizations to assist in developing quality experiences, as well as actively promoting BC's Aboriginal tourism businesses to visitors and local residents.

Guided by a vision of “a healthy, prosperous, strong, respectful and dynamic Aboriginal tourism industry sharing authentic high quality products that exceed visitor expectations”, significant success has been achieved since the introduction of the unprecedented Aboriginal Tourism BC Blueprint Strategy in 2006. The AtBC Blueprint Strategy: Tourism Performance Review 2006-2010 summarizes the results of a partnership between the Aboriginal Tourism Association of BC (AtBC), the Province of BC and the Government of Canada. Highlights from the report include a number of economic achievements:

- An estimated 3.7 million tourists experienced some form of Aboriginal cultural tourism in 2010, almost double the number from 2006.

- There are more than 200 Aboriginal tourism businesses in BC, about 23 per cent of these established between 2006 and 2010.
- An estimated 2,226 full-time equivalent jobs were generated by these businesses in 2010, a 32 per cent increase from 2006.
- Aboriginal tourism expenditures reached an estimated \$40 million in 2010, representing a six per cent increase over 2009 levels and doubling over 2006 levels.

By 2012, about 3.9 million visitors are expected to include Aboriginal cultural tourism experiences in their BC trip itineraries. It is anticipated that these visitors will collectively spend around \$43 million, representing an increase of approximately 115% per cent over 2006 spending. AtBC is designing a new five-year plan entitled “The Next Phase” that will ensure the Aboriginal tourism industry achieves even greater growth by 2017.

An estimated 3.7 million tourists experienced some form of Aboriginal cultural tourism in 2010, almost double the number from 2006.



3 WORLD CLASS VISITOR EXPERIENCES

VISITOR INFORMATION

Exceptional visitor experiences are built on accurate and timely information, outstanding customer service and products, and by exceeding visitors' expectations. Exceptional experiences will lead visitors to increase spending by participating in more activities, extending their trip in BC, returning for another trip and/or recommending BC to others.

The Province has invested \$6.83 million since 2008 and funded nearly 150 connectivity projects to establish the infrastructure needed to bring high-speed Internet services to over 210 new locales in BC. This is in addition to the face-to-face visitor servicing provided by the over 100 Visitor Centres operating in communities throughout the province, which provide up-to-date, accurate information for travellers.

ACTIONS

- Ensure province-wide information and communications technology infrastructure (wifi, mobile and internet access) is in place.
- Align tourism technology planning to existing and anticipated infrastructure investments by government and the private sector.
- Work with industry to review and build consumer confidence in BC's tourism product quality and standards as a competitive advantage.

Visitor Centres help to increase visitor spending, length of stay and encourage repeat visits.





3 WORLD CLASS VISITOR EXPERIENCES

SKIING – BC’S WINTER EDGE

With 13 major ski resorts across the province and home to Whistler Blackcomb – consistently rated as the No.1 Ski Resort in North America – British Columbia is renowned as one of the top destinations in the world for skiing. In hosting the Vancouver 2010 Olympic and Paralympic Winter Games, BC had the opportunity to showcase its many winter assets including the spectacular natural scenery, the numerous winter activities available, the innovative infrastructure and the warm welcome of British Columbia.

Skiing and snowboarding, and the many other winter activities available in BC such as heli-skiing, backcountry skiing, cross-country skiing and snowshoeing provide endless quality tourism opportunities. Not only does BC boast some of the best vertical elevation in North America, but few places in the world can offer year-round skiing as well as highly developed four-season resorts. From family-friendly resorts in the Thompson Okanagan to the Powder Highway in the Kootenay Rockies with the longest lift-serviced vertical in North America, BC’s ski resorts offer something for every taste and ability.

“British Columbia will become North America’s No.1 ski destination.”

Premier Christy Clark
Canada Starts Here: The BC Jobs Plan

3 WORLD CLASS VISITOR EXPERIENCES

JOBS IN TOURISM

Tourism in British Columbia employs more than 127,000 people throughout the province. The “human element” of the tourism experience is fundamental to achieving success as a desirable place to visit. Visitors’ interactions with British Columbia’s residents, tourism service providers and visitor counsellors provide an essential part of the vacation “memory” and are critical to gaining positive referrals (word-of-mouth) and return business. Increasingly, as customer service experiences are documented almost instantaneously online, a well-trained, consumer-focused workforce is a critical aspect of the tourism experience.

In order to train and retain a strong work force in the tourism industry, labour market challenges need to be addressed. As baby boomers continue to retire, smaller demographic groups enter the labour force, and competition from other industries and jurisdictions put pressure on this sector. A conservative estimate sees 5% of the tourism workforce retiring or leaving the sector each year. Impending labour shortages require action to attract and retain a highly skilled and motivated workforce, which is critical to achieving industry growth.

ACTIONS

- Work with the tourism sector to ensure that labour market strategies are in place that identify and address the industry’s unique labour market pressures.
- Work with stakeholders including employers, secondary and post secondary educators to address gaps and capitalize on opportunities in training and education programs.
- Work in partnership with tourism human resource and training delivery organizations to provide a range of industry training tools across the province.



Tourism in British Columbia employs more than 127,000 people throughout the province.

A photograph of a dense, moss-covered forest. The ground is covered in thick, vibrant green moss. Large tree trunks and fallen branches are also covered in moss. A person wearing a blue jacket and a red backpack is standing in the lower left foreground, looking towards the forest. The overall atmosphere is serene and natural.

The human element of the tourism experience is fundamental to achieving success as a desirable place to visit.

BC TOURISM STRATEGY: FOUR THEMES FOR SUCCESS

4 REMOVING BARRIERS TO INDUSTRY GROWTH

A welcoming business environment, with competitive taxes and a streamlined, efficient regulatory system, is a key ingredient for successful tourism businesses, many of which are small companies.

BUSINESS ENVIRONMENT

British Columbia is one of the most competitive jurisdictions in the world when it comes to corporate taxation. Effective January 1, 2011, the corporate income tax rate was reduced to 10 percent. By 2012, BC will have among the lowest corporate income tax rates among the G7 countries. A favourable tax environment and a modern, streamlined regulatory environment are key to spurring investment and creating jobs throughout the province.

CROWN LAND AND COMMERCIAL TOURISM OPERATIONS

Crown land comprises 94 percent of BC's land base and is a critical resource for the tourism industry. Outdoor adventure experiences in pristine natural settings epitomize the BC tourism experience and are intrinsic to the *Super, Natural British Columbia* brand. The provincial government has been improving policies and processes related to Crown land allocation and tenure for commercial tourism uses since the 1990s, however, issues remain regarding the timeliness of land-use decisions.

EASING THE FLOW OF TRAVELLERS INTO BRITISH COLUMBIA

In the wake of 9/11, heightened security and entry procedures have unfortunately created barriers and challenges for international visitors to Canada. While provincial and federal transportation investments of over \$340 million have improved travel time to and from border crossings, tightened security requirements have increased processing times at land border crossings, leading to ongoing border delays. BC, working cooperatively with Canadian and USA border agencies and Washington State, has contributed to improving border processing efficiency through measures such as NEXUS/FAST lanes, traveller information systems, truck staging areas, the Enhanced Driver Licence program and public information and education campaigns.

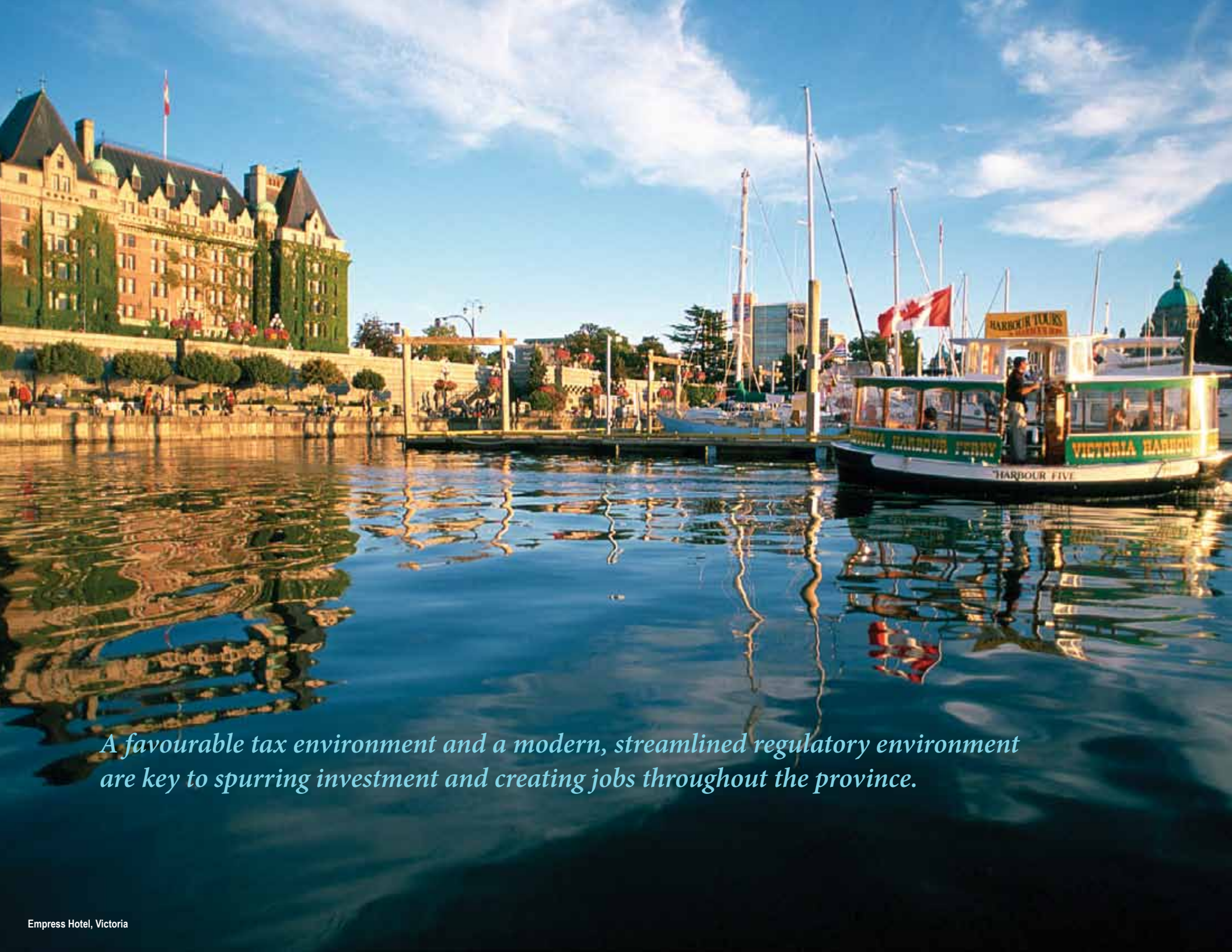
In February 2011, Prime Minister Harper and President Obama signed a declaration on perimeter security and economic competitiveness. A "Beyond the Border Working Group" composed of representatives from both federal and provincial governments has been established to develop and implement an action plan (expected to be released in late Fall, 2011). BC is advocating for the action plan to improve border operations, reduce institutional and operational barriers, and increase participation in trusted traveller programs in order to facilitate access by business travellers and tourists.

AIR ACCESS TO AND WITHIN BC

Globally, the tourism industry is becoming more reliant on air transportation to move visitors to destinations. Air capacity will influence BC's ability to increase the number of tourists from key existing and emerging markets. Air capacity – both to and within the province – is particularly critical given BC's distance from many markets and the geographic size of the province. The Government of Canada has jurisdiction over air access, requiring the provincial government to work collaboratively with the federal government to improve air access to BC.

Over the past decade, there has been progress on improving air access between BC and select tourism markets. However, it is critical to expand air service with BC's key markets in order to facilitate travel and increase the number of visitors. The *Air Bilateral* agreement between Canada and Mexico, which was announced in August 2011, is a significant step in this direction. In addition, the province will work with the federal government towards expanded air service from emerging markets such as China and India.

Access to rural BC destinations is also important in order that tourism in these outlying communities continues to grow and flourish. Visitors need to be able to fly to rural BC destinations in a timely, comfortable and cost-effective manner. Recognizing this need, the provincial government has already invested \$65.5 million in infrastructure projects at 36 airports across BC since 2003.



A favourable tax environment and a modern, streamlined regulatory environment are key to spurring investment and creating jobs throughout the province.

4 REMOVING BARRIERS TO INDUSTRY GROWTH

ACTIONS

- Enhance the Small Business Venture Capital Program tax credit, which encourages direct investments in new businesses; tourism businesses will be among the beneficiaries.
- Work with air carriers to identify opportunities for business development and/or expanded services.
- Influence the federal government to establish and/or expand air service agreements and address other international air access impediments (including costs) with BC's key existing and emerging tourism markets.
- Promote the expansion of passenger pre-clearance and trusted traveller programs at air, marine and land borders. This includes promoting ways to increase usage of NEXUS and the Enhanced Drivers License program.
- Encourage the federal government to streamline tourist visa application procedures and implement technology solutions to speed approvals and entries.
- Implement a harmonized, transparent, time-limited permitting and approval process; this will include developing common standards and practices across sectors, reducing the backlog of *Water Land Act* tenure applications by 50 per cent by December 31, 2012, and improving client service.
- In support of open data and economic development, develop web-based spatial mapping tools, which provide economic and resource information, including tourism.

GAINING THE EDGE: KEY STRATEGIC SHIFTS

In summary, the 2012-2016 Tourism Strategy is built around key changes in focus including:

- Developing a new provincial marketing partnership model to effectively implement the BC Tourism Strategy
- Improving coordination of tourism marketing activities across BC's tourism sector
- Shift provincial marketing efforts to focus on high key products and markets while supporting regional, community and city efforts in nearby markets
- Actively pursuing emerging markets of China, India and Mexico
- Ensuring a positive visitor experience by providing timely and comprehensive information to consumers at every stage of their travel process
- Supporting training and tourism skills development programs.



British Columbia will inspire and motivate visitors by showcasing high potential tourism products where BC has competitive strength.



BC TOURISM STRATEGY: SUMMARY OF KEY ACTIONS

LEADERSHIP THROUGH PARTNERSHIP AND COORDINATION

To create a market-driven regime to solidify and strengthen BC's competitive advantage:

- Develop a stable and predictable funding mechanism for tourism.
- For 2012/13, complete an enhanced accountability framework for the Municipal and Regional District Hotel Room Tax.

Work with industry to coordinate roles and responsibilities of BC's tourism marketing organizations:

- Create, lead and maintain a collaborative, integrated planning model among tourism marketing organizations.
- Develop best practices and key performance indicators to measure and monitor outcomes, creating transparency and accountability in the system.

FOCUSED MARKETING

To build upon the *Super, Natural British Columbia*® brand as a travel motivator:

- Bring the brand to life through social media that amplifies the voice of visitors, residents and industry as advocates for the BC tourism experience.

To harness the power of emerging technology to deliver timely, accurate travel and product information regardless of location or device:

- Upgrade and refresh the HelloBC.com network of international websites.
- Launch new mobile sites and applications.

To inspire and motivate visitors by showcasing high potential tourism products where BC has competitive strength:

- Deploy a combination of media relations, social media, travel trade and consumer direct marketing, with the mix and emphasis varying by market.
- Use cost-effective tools such as online channels to enable consumers to easily access the full spectrum of BC tourism product experiences.
- Develop a new action plan for marketing meetings and conventions in partnership with communities.

To shift provincial marketing efforts to focus on high potential products and markets:

- Create marketing campaigns to motivate visits from priority markets (California, Ontario, UK, Australia, Japan, Germany, South Korea).
- In partnership with the Canadian Tourism Commission (CTC), launch consumer and trade campaigns to capitalize on Canada's Approved Destination Status in China.
- Develop and implement a market entry plan for India.
- Continue to work with the CTC to increase visits from Mexico.
- Promote tourism in BC's rural areas through online programs.
- Support marketing by regions, communities and cities to nearby markets (BC resident, Alberta, Washington State).

WORLD CLASS VISITOR EXPERIENCES

To take full advantage of the tourism benefits of investments in public infrastructure:

- Market tourism use of provincial infrastructure and Crown assets.
- Implement "A Trails Strategy for British Columbia" – an action plan for developing and maintaining a sustainable, world-renowned network of recreation trails.

To support the development of outstanding tourism products in BC communities:

- Assist more BC tourism businesses, local governments and communities to become market-ready by providing planning tools and support for programs.
- Lead in providing high quality, accessible, timely and relevant research and market intelligence.
- Continue to work with Aboriginal Tourism BC.

To build on an outstanding system of tourism information:

- Ensure province-wide tourism information and communications technology infrastructure (wifi, mobile and internet access) is in place.

To train and retain a strong tourism workforce:

- Work with the tourism sector to ensure that labour market strategies are in place that identify and address the industry's unique labour market pressures.
- Work in partnership with tourism human resource and training delivery organizations to provide a range of industry training tools across the province.

REMOVING BARRIERS TO INDUSTRY GROWTH

To increase the competitiveness of BC's tourism businesses:

- Enhance the Small Business Venture Capital Program tax credit.
- In support of open data and economic development, develop web-based spatial mapping tools, which provide economic and resource information, including tourism.

To improve the timeliness of Crown land-use decisions:

- Implement a harmonized, transparent, time-limited permitting and approval process that includes common standards and practices across sectors, reducing the backlog of Water Land Act tenure applications by 50 per cent by December 31, 2012 and improving client service.

To ease the flow of travellers into BC:

- Promote the expansion of passenger pre-clearance and trusted traveller programs at air, marine and land borders. This includes promoting ways to increase usage of NEXUS and the Enhanced Drivers License program.
- Encourage the federal government to streamline tourist visa application procedures and implement technology solutions to speed approvals and entries.

To improve air access to and within BC:

- Work with air carriers to identify opportunities for business development and/or expanded services.
- Influence the federal government to establish and/or expand air service agreements and address other international air access impediments (including costs) with BC's key existing and emerging tourism markets.



Ministry of
Jobs, Tourism
and Innovation



THE BC
JOBS PLAN