



C·V·R·D

COWICHAN VALLEY REGIONAL DISTRICT

NOTICE OF SPECIAL BOARD MEETING

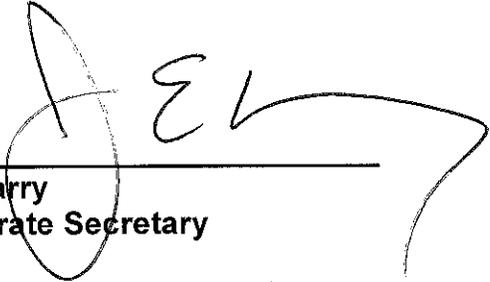
DAY: WEDNESDAY

DATE: FEBRUARY 22, 2012

TIME: → 1:00 PM

PLACE: BOARD ROOM

175 INGRAM STREET



Joe Barry
Corporate Secretary



C·V·R·D

SPECIAL BOARD MEETING

1:00 PM

WEDNESDAY, FEBRUARY 22, 2012

AGENDA

| | PAGES |
|--|--------------|
| 1. <u>APPROVAL OF AGENDA:</u> | 2 |
| 2. <u>STAFF REPORTS:</u> | |
| SR1 Staff Report from the Chief Administrative Officer Re: Visitor Information Services Proposal | 3-131 |
| 3. <u>ADJOURNMENT:</u> | |

The next Regular Board meeting will be held March 14, 2012 at 6:00 pm, in the Board Room, 175 Ingram Street, Duncan BC.



SR1

STAFF REPORT

**SPECIAL BOARD MEETING
OF FEBRUARY 22, 2012**

DATE: February 16, 2012 **FILE NO:**
FROM: Chief Administrative Officer **BYLAW NO:**
SUBJECT: Visitor Information Services Proposal

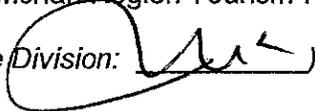
Recommendation/Action:

That the following recommendations be referred to 2012 budget deliberations to be considered in conjunction with Regional Grant-In-Aid requests received by the CVRD.

1. That the CVRD provide a Regional Grant-In-Aid in the amount of \$609,000 to the Duncan-North Cowichan Chamber of Commerce to assist in the construction of a new Regional Visitor Information Centre at the Forest Discovery Centre;
2. That the Tourism Cowichan Restructure Committee be tasked with leading a joint planning process to determine how to best deliver gateway Visitor Information Services at the Region's Northern, Southern and Western gateways;
3. That upon completion of the gateway planning process the CVRD contribute a \$150,000 Regional Grant-In-Aid for capital works to each of the gateway initiatives; and
4. That the total \$1,059,000 be funded through short-term borrowing, to be paid back over five (5) years under the Liabilities Under Agreements Section of the *Community Charter*.

Relation to the Corporate Strategic Plan:

Providing assistance to fund Visitor Information Services supports Strategic Plan objectives to (1) promote tourism; and (2) support policies and initiatives that strengthen the local economy. This Visitor Information Service initiative is also supported by the Tourism Cowichan Development Strategy (2007) and the Cowichan Region Tourism Plan (2010).

Financial Impact: (Reviewed by Finance Division: )

The financial impact of the Visitor Information Centre proposal depends on which financing option the Board prefers, the total funding amount and which municipalities and electoral areas participate. Should the Board wish to fund \$609,000 alone the Board could tax for the entire amount in 2012. The cost per \$100,000 of assessed residential value would be \$3.90 if all partners participated. Should the Board wish to short-term borrow the annual cost over five (5) years would be \$0.80 per \$100,000. Given current interest rates staff would recommend the short-term borrowing option.

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Should the Board wish to fund \$1,059,000, staff again recommend short-term borrowing. If borrowed over five (5) years the annual cost per \$100,000 of assessed value would be \$1.39. Because of current low interest rates the additional cost of interest as a result of the borrowing would be \$26,000.

It is important to note that no funds have been included in the draft Financial Plan previously circulated to Board members. Once it is clear which funding option, if any, the Board wishes to pursue, staff will be in a position to more precisely outline cost implications.

Background:

On December 14, 2011 the Duncan-North Cowichan Chamber of Commerce appeared before the CVRD Board to request that the Board contribute \$609,000 toward a "Regional Visitor Information Centre" to be constructed at the southeast corner of the Trans Canada Highway and Bell McKinnon Road adjacent the BC Forest Discovery Centre (December 14, 2011 report attached as Appendix A). The Chamber has been successful in attracting more than \$750,000 in grants to assist in the construction of the new Visitor Information Centre. According to the Duncan-North Cowichan Chamber \$609,000 is required to complete the project valued at \$2,548,000. It should be noted that CVRD staff have done no analysis on the proposed Visitor Information Centre design or costs and this report presumes that the scale of the project is appropriate and that \$609,000 is the required amount to complete it. On December 14, 2011 the Board referred consideration of the Chamber's request to the January 25, 2012 Regional Services Committee.

At its January 25, 2012 meeting, the Regional Services Committee resolved:

"...that the request for funding for the Regional Visitor Information Centre be referred to staff to review and make recommendations on options regarding the opportunities / need for the CVRD to provide capital funding to assist in the development of gateway tourism centres in the North, South and West; and that staff report back to a Special Board meeting on February 22, 2012 prior to the Regional Services meeting."

On January 31, 2012 staff met with representatives of the five (5) area Chambers of Commerce to discuss the Committee's direction and the process proposed by CVRD staff for responding to the Committee's resolution. In staff's view the Chambers have a strong desire to work together and each has a strong commitment to the Cowichan Region and the communities they more directly represent. Each Chamber is different in the visitor services they currently provide and each vision for the future is at a different level of maturity. Tourism studies completed in 2007 and 2010 suggest that more of a focus on visitor information centre services is desirable.

Tourism is a significant economic driver in Cowichan and the importance of tourism to the local economy is expected to grow as challenges to the natural resource sector continue and visitors continue to seek opportunities to explore outdoor adventures, First Nations traditions, the wine industry and heritage and culture. In December 2007 a "Tourism Cowichan Development Strategy" (attached as Appendix B) was completed. The purpose of the Strategy was to provide recommendations on how to improve visitor services and the coordination of tourism development in the Region. With respect to locating visitor services the Strategy recommends:

.../3

“...the development of a regional network for visitor services which celebrates each area’s attractions rather than one central physical structure. This does not preclude the future development of a regional centre if the joint planning process supports this initiative over time.”

The development of the “regional” Duncan-North Cowichan Visitor Centre and three (3) gateway facilities is consistent with the recommendations of the Strategy. While the Strategy and Chambers appear to agree on the value and need for a network of Visitor Information Services the question outstanding and before the Board is how these services should be funded.

The Board resolution did not provide direction on the amount of funding that might be made available for the three (3) gateway projects, but at the meeting a total funding commitment of \$1,000,000 was discussed so for the purpose of this report a CVRD contribution of \$150,000 toward each of the gateway initiatives is used. It is fair to question if this is an appropriate number, however, there is no doubt that \$150,000 would go a long way to advancing gateway Visitor Information Services.

While the request before the Board deals only with one-time capital costs, the Strategy recognizes the need for additional operating funds in the future. This does not mean that these costs should necessarily be derived from property tax, but it is clear that new visitor services will likely require operating funds from some source. The Duncan-North Cowichan Chamber has stated that it does not require additional operating funds from the CVRD for the proposed visitor information centre. For clarity the matter before the Board is strictly for the capital funding of Visitor Information Services.

Four (4) visitor information facility funding options are provided for the Board’s consideration. It should be noted that in each example the potential tax impact is based on cost per \$100,000 of assessed value for residential property. The cost per \$100,000 will vary for other property classes. The options also presume participation by all municipalities and electoral areas and that short-term borrowing over five (5) years is the preferred financing model.

Option 1: **No additional funding**

Region-wide Tax Impact per \$100,000 Assessed Value: \$0

The Board may choose to provide no capital funding for visitor information facilities. This option would result in no tax increase; however it would likely result in the delay of construction of the Duncan-North Cowichan facility and potentially the loss of \$750,000 of previously awarded grants to the Duncan-North Cowichan Chamber of Commerce.

It should be noted that the Regional District currently provides approximately \$120,000 in funding for Tourism Cowichan.

Option 2: **Fund only Duncan-North Cowichan Facility**

Region-wide Tax Impact per \$100,000 Assessed Value: \$0.80

The original request to the CVRD Board by the Duncan-North Cowichan Chamber was for \$609,000 to assist in funding the new Regional Visitor Information Centre. Funding this one project would result in the construction of an excellent facility that would be regional in scale and a valuable addition to the Region’s tourism infrastructure. However, while consistent with the Tourism Strategy, Option 2 does not advance the regional network of visitor services as far as would options 3 and 4.

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Option 3: Fund Duncan-North Cowichan Centre and provide \$150,000 to each of the South Cowichan, Lake Cowichan and Ladysmith Chambers to assist in funding capital works for their respective Visitor Information Services

Total Cost: \$1,059,000

Cost per \$100,000 of Assessed Value: \$1.39

This option proposes short-term borrowing of \$1,059,000, \$609,000 for the Duncan-North Cowichan facility and \$150,000 to each of the Ladysmith, Lake Cowichan and South Cowichan Chambers. The three (3) Chambers would each use the \$150,000 for capital works of their choosing in support of Visitor Information Services. The Ladysmith, South Cowichan and Lake Cowichan Chambers were each invited to provide some background on how they would utilize a contribution of \$150,000 toward gateway Visitor Information Services.

Ladysmith

\$150,000 would be devoted to the resurgence of the Ladysmith Train Station as a new location for a Visitor Information Centre. The old train station is conveniently located adjacent to the Island Highway at a main four way stop for ease of access north and south. The Chamber would partner with the Town of Ladysmith and use the CVRD funding to build additional financial partners to develop the required building fund to restore the historical feature. The Chamber envisions period costumes for Centre staff who would greet the trains and highway visitors to the CVRD and Ladysmith. During 2011 the Chamber held a few events to start the building fund and they presently have \$10,000 accumulated. Ladysmith has two estimates for the Train Station, one to recondition the one level station (approximately \$250,000) and a second adding another floor, pushing the need to approximately \$450,000. The Chamber will continue to discuss the two options with the Town of Ladysmith.

South Cowichan

At the time of writing the report information from the South Cowichan Chamber had not yet been received.

Cowichan Lake

At the time of writing the report information from the Cowichan Lake Chamber had not yet been received.

Option 4: This option is similar to Option 3 with the difference being that the \$150,000 funding for gateway visitor services facilities be spent after a joint planning process where gateway Visitor Information Services are considered and agreed upon

Total Cost: \$1,059,000

Cost per \$100,000 of Assessed Value: \$1.39

Like Option 3 this option proposes short-term borrowing of \$1,059,000, \$609,000 for the Duncan-North Cowichan facility and \$150,000 to each of the Ladysmith, Cowichan Lake and South Cowichan Chambers. It is proposed that the funding be made available upon completion of a joint planning process designed to determine how gateway visitor information services be best delivered. A comprehensive planning process involving tourism industry and Chamber stakeholders is proposed. Admittedly, under this option there is a presumption that a network approach to Visitor Information Services is preferable and that the larger centre should be

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located where it is being proposed. Therefore what is left to determine is how the remaining three (3) gateway services/facilities should be developed. So while perhaps not starting with a perfectly clean slate from a planning perspective this option is consistent with the 2010 and 2007 tourism Strategies, it takes advantage of the significant opportunity generated by the Duncan-North Cowichan Chamber and it helps maintain the momentum needed to advance the desired gateway services.

Financing

Should the Board wish to provide \$1,059,000 to fund Visitor Information Services as described, there are two (2) basic options to consider. First, the Board could choose to tax the entire \$1,059,000 in one year. The cost per \$100,000 of residential assessed value would be \$6.78. The second option would be to short-term borrow which would result in an annual tax of \$1.39 per \$100,000 of assessed value for five (5) years. It should be noted that borrowing rates are currently low making the cost of borrowing \$1,059,000 over the five (5) years \$26,000.

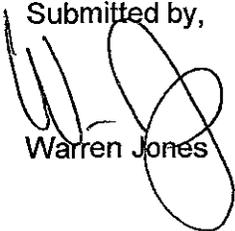
Participating Areas

If all electoral areas and municipalities were to participate in the funding of new Visitor Information Services the money would be borrowed under the Economic Development Function of which all partners are members. The process for borrowing becomes more complex if not all electoral areas and municipalities participate. In this instance the *Local Government Act* would require that a new service be created thus necessitating a public approval process. The Board could seek approval by way of Referendum or Alternative Approval Process (AAP). Ultimately, the cost for those participating in a new service would depend on how many electoral areas and municipalities participate. The more assessment included in the service the less the cost per assessed unit.

Staff suggests Option 4 is the best approach and recommend that this option be referred to 2012 budget deliberations to be considered in conjunction with the other Regional Grant-In-Aid requests received by the CVRD.

Clearly, we are in uncertain economic times, however, it is also clear that there is tremendous value in continuing to support the business community's and tourism industry's efforts to increase visitors to the Region and to diversify the local economy. This is a challenging issue for the Board. The Duncan-North Cowichan Chamber has attracted significant third party grant funding and it is important that those funds be used locally and not lost. While perhaps difficult from a timing and taxing perspective, the opportunity may also assist with implementing aspects of the Cowichan Tourism Development Strategy and Regional Tourism Plan, hence staff's recommendation that a joint planning process be undertaken to determine how to best advance the gateway visitor information facilities in the Northern, Southern and Western parts of the Region. There exists some helpful guidance specific to Visitor Information Service Strategies in the 2007 Tourism Cowichan Development Strategy. It is recommended that the development of the Strategy be referred to the Tourism Cowichan Restructure Committee that was established by the Board at its February 8, 2012 meeting. Finally, from a cost perspective, given the current low borrowing costs and competitive construction environment it is likely a good time to be developing the visitor service infrastructure.

Submitted by,


Warren Jones



APPENDIX A

STAFF REPORT

REGULAR BOARD MEETING
OF DECEMBER 14, 2011

DATE: December 5, 2011

FILE NO:

FROM: Mark Kueber, General Manager
Corporate Services Department

BYLAW NO:

SUBJECT: Regional Visitor Information Centre

Recommendation/Action:

Board direction is requested.

Relation to the Corporate Strategic Plan:

The promotion of tourism is an objective of the CVRD's Corporate Strategic Plan and the overall regional tourism goals are supported by two recent tourism strategies – Cowichan Region Visitor Services Strategy (2007); and the Cowichan Region Tourism Plan (2010).

Financial Impact: (Reviewed by Finance Division:)

The financial impact will depend on which option is selected. The regional impact of financially supporting this project is;

- Providing grant in aid of \$160,000 in 2011 cost \$1.05/100,000 of assessed value in 2012.
- Providing grant in aid of \$449,000 in 2012 cost \$2.94/100,000 of assessed value.
- Borrowing \$609,000 over 5 years costs \$0.83/100,000 of assessed value.
- Borrowing \$449,000 over 5 years costs \$0.61/100,000 of assessed value.

Background:

The Regional Board was approached by the Duncan/Cowichan Chamber of Commerce to help fund a Regional Visitor Information Centre that would benefit the entire Cowichan Valley Regional District. The Regional Board at its November 9, 2011 meeting passed the following motion:

"That the Board requested the Duncan – Cowichan Chamber of Commerce to prepare an agreement between the Cowichan Valley Regional District and the Duncan – Cowichan Chamber of Commerce that would, if approved by the Board, facilitate the CVRD's borrowing of funds to assist in the construction of a new Regional Information Centre at the BC Forest Discovery Centre; and that the agreement outline the services that would be provided to the Cowichan Region; and further, that the agreement and funding request be referred to the December 14, 2011 Board Meeting for consideration."

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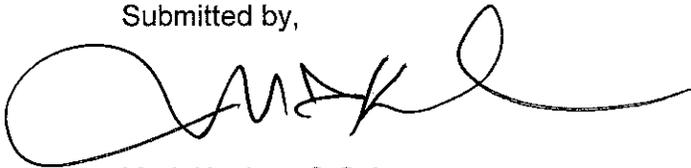
The Board can choose to support this project Regionally through General Government by way of a grant in aid, or through the Economic Development function, both of which are regional, or it can establish a separate function with reduced participants. The creation of a new function in 2012 with reduced participants will require a public approval process which will delay the taxation of the required funds to 2013.

Please find attached support from the five Chambers of Commerce and Community Futures, their three year draft budget, as well as a summary of the project. Chamber of Commerce members will be on hand at the meeting to answer any questions.

There are a number of options available to the Board,

- 1) The Board may chose to not support this project which will result in no cost to the CVRD.
- 2) Fund \$160,000 in 2011 out of General Government surplus; this will result in a higher tax requisition in 2012.
- 3) The balance of the funds requested, (\$449,000) can be provided directly out of the 2012 regional grant in aid budget or short term borrowing may be used.
- 4) The Regional District may chose to short term borrow the entire request of \$609,000 to be paid off over a five year period.
- 5) The final option is for the Regional District to go to the public and seek approval to establish a new debt function to be used to pay the short term debt.

Submitted by,



Mark Kueber, C.G.A.
General Manager, Corporate Services Department

MK:tk

Attach.

Z:\Mark\Staff Reports - 2011\Staff Report -Regional Visitor Information Centre.doc

Cowichan Valley Chambers of Commerce,

Dec 6, 2011

Duncan-Cowichan, South Cowichan, Cowichan Lake, Chemainus, and Ladysmith Chambers of Commerce.

Visitor Centre

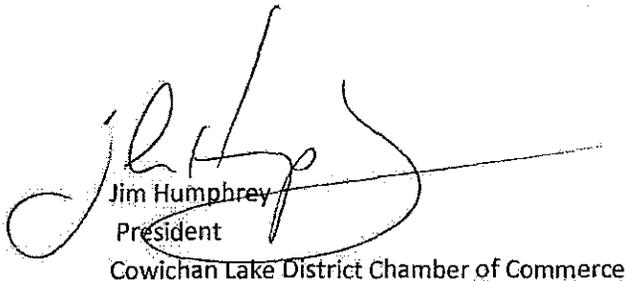
Consistent with best practices of external marketing supporting the concept of Destination Marketing, we strongly believe the best strategy for increasing the length of visitor stays and spending, are to promote attractions and activities within the entire region as one entity.

The Cowichan Chambers and Visitors Centres are prepared to continue to work collaboratively to market the Cowichan Region as a whole.

An effective Visitors Centre Network will provide opportunities to promote the regions tourism, cultural and other economic sectors to an audience many times larger than we can reach individually. The new interpretive facility will be a focal point of the region, showcasing the scope of the Cowichan Region's tourism and other economic sectors.

Synergies and economies of scale can be capitalized on by creating a network of Visitors Centres for internal marketing for the region. We recognize that as part of a comprehensive strategy this would also include a centre in the South Cowichan region.

We the undersigned fully support the building of a centrally located Visitors Centre at the Forest Discovery Centre.



Jim Humphrey
President
Cowichan Lake District Chamber of Commerce

Cowichan Valley Chambers of Commerce,

Dec 6, 2011

Duncan-Cowichan, South Cowichan, Lake Cowichan, Chemainus, Ladysmith Chambers of Commerce.

Regional Visitor Centre

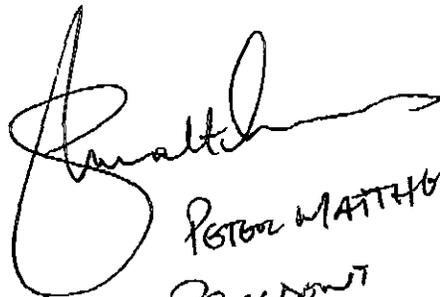
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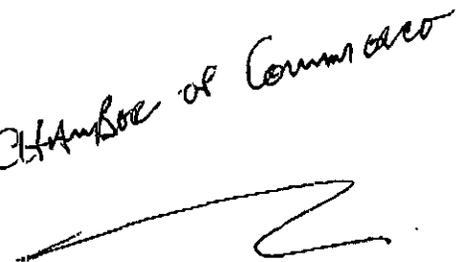
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PETER MATTHEWS
PRESIDENT
CHEMAINUS CHAMBER OF COMMERCE



Cowichan Valley Chambers of Commerce,

Dec 6, 2011

Duncan-Cowichan, South Cowichan, Lake Cowichan, Chemainus, Ladysmith Chambers of Commerce.

Regional Visitor Centre

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We the undersigned fully support the building of a centrally located Regional Visitors Centre at the Forest Discovery Centre.



MIKE HANSON

SOUTH COWICHAN
CHAMBER OF COMMERCE

Cowichan Valley Chambers of Commerce,

Dec 6, 2011

Duncan-Cowichan, South Cowichan, Lake Cowichan, Chemainus, Ladysmith Chambers of Commerce.

Regional Visitor Centre

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We the undersigned fully support the building of a centrally located Regional Visitors Centre at the Forest Discovery Centre.

Rob Waters
President,
LADYSMITH Chamber of Commerce
Dec. 06/11

Cowichan Valley Chambers of Commerce,

Dec 6, 2011

Duncan-Cowichan, South Cowichan, Lake Cowichan, Chemainus, Ladysmith Chambers of Commerce.

Regional Visitor Centre

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We the undersigned fully support the building of a centrally located Regional Visitors Centre at the Forest Discovery Centre.



Dec. 6, 2011

Duncan-Cowichan

Ranjit Dhami

December 7, 2011

Mark Kueber
Corporate Services Department, CVRD
175 Ingram Street, Duncan,
British Columbia, V9L 1N8

Mark,

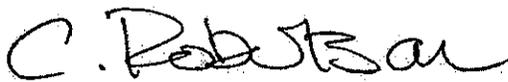
Community Futures Cowichan is pleased to provide this letter of support for the agreement between the five Regional Chamber of Commerce.

In the Cowichan Region we face challenges of diversifying our economy but at the same time we want to maintain our quality of life and our ability to seize opportunities as they arise. We know this work can be difficult for our stand-alone organizations with shrinking resources. This agreement recognizes the need for the Chambers to be more collaborative, positioning them to play a vital role in business and community development in the entire Region.

Most significant is the commitment to fully support the new Duncan-Cowichan Chamber of Commerce Visitor Info Centre, and recognize it as a regional centre. We see this as having major benefits to the Chambers directly in cost savings, joint applications in future funding needs and shared resources. For the region and for the tourism sector, it strengthens regional marketing strategies, makes the region more competitive in attracting visitors and sends a strong message to tourism funders that the Cowichan is a major player. All this brings direct benefits to our locally owned and operated tourism businesses.

We applaud the five Chambers for their forward thinking. This commitment now prepares their organizations and memberships for inevitable change. We look forward to working with this cohesive group, as together our organizations can bring further benefits to our region

Yours truly,



Cathy Robertson
General Manager
250-746-1004

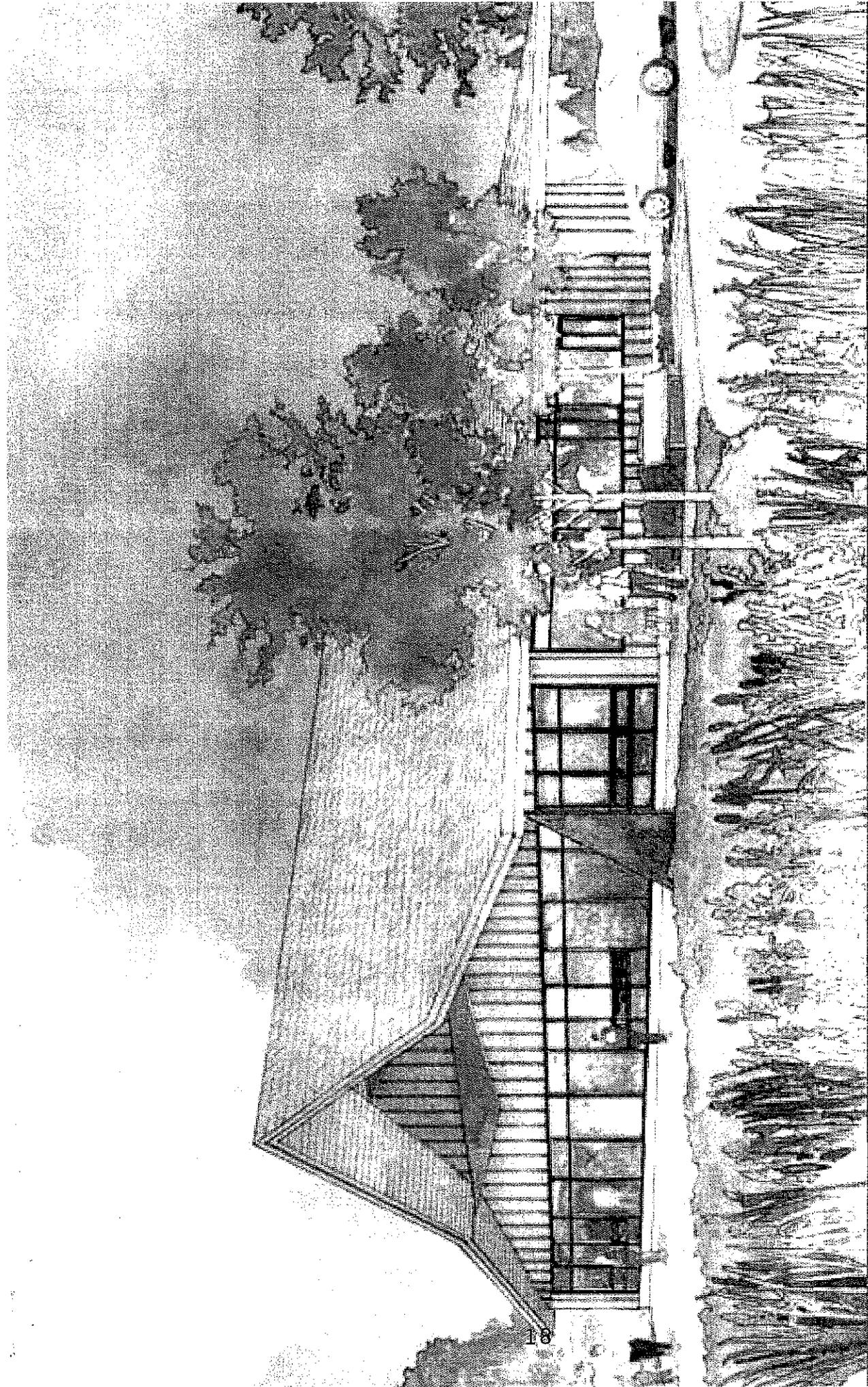
DUNCAN-COWICHAN REGIONAL VISITOR CENTRE
Revised ONE YEAR OPERATING FORECAST

| | ORIGINAL 2010-11 Budget | Projections Year One | Projections Year Two | Year Three |
|---|-------------------------------|----------------------------|----------------------------|---------------|
| REVENUES | | | | |
| Members' dues | 65,000.00 | \$80,000.00 | 80,000.00 | 84,000.00 |
| Group insurance commissions | 20,000.00 | \$25,000.00 | 25,000.00 | 25,000.00 |
| Government grants | | | | |
| City of Duncan | 37,500.00 | \$27,000.00 | 27,000.00 | 27,000.00 |
| Municipality of North Cowichan | 18,000.00 | \$29,000.00 | 29,000.00 | 29,000.00 |
| Tourism BC Visitor Centre Fee for Service | 10,000.00 | \$10,000.00 | 25,000.00 | 30,000.00 |
| Miscellaneous fee for service | 2,000.00 | \$3,000.00 | 3,000.00 | 3,100.00 |
| Culinary Gala net revenue | 15,000.00 | \$20,000.00 | 20,000.00 | 21,000.00 |
| Black Tie net revenue | 5,000.00 | \$5,000.00 | 5,500.00 | 6,000.00 |
| Chamber lunches net revenue | -500.00 | \$500.00 | 2,000.00 | 2,100.00 |
| Retail Sales Gross | 3,000.00 | \$8,000.00 | 5,000.00 | 6,000.00 |
| Racking fees | 0.00 | \$500.00 | 1,000.00 | 1,100.00 |
| Advertising Revenues | | \$6,500.00 | 8,000.00 | 10,000.00 |
| <u>NEW REVENUES</u> | | | | |
| Office rental | 0.00 | \$0.00 | 12,000.00 | 12,600.00 |
| Multipurpose Room Rentals | 0.00 | \$2,500.00 | 3,000.00 | 3,500.00 |
| Corporate sponsorships of Visitor Centre | 0.00 | \$6,500.00 | 8,000.00 | 10,000.00 |
| ATM revenues | | \$0.00 | | |
| Booking/Reservation revenues | | \$1,000.00 | | |
| After Hours Rental | | \$3,000.00 | | |
| Exhibits & Displays | | \$2,000.00 | | |
| Total Revenues | 175,000.00 | \$229,500.00 | 253,500.00 | 270,400.00 |

DUNCAN-COWICHAN REGIONAL VISITOR CENTRE
Revised ONE YEAR OPERATING FORECAST

EXPENSES

| | | | | |
|---|-------------------|---------------------|-------------------|-------------------|
| Commissions on new memberships | | | | |
| Salaries and benefits | 91,128.00 | \$143,600.00 | 150,000.00 | 155,000.00 |
| Training: Regional Fams, Guest speakers etc | 0.00 | \$2,000.00 | 2,000.00 | 2,100.00 |
| Advertising | 4,000.00 | \$5,000.00 | 5,000.00 | 5,250.00 |
| Accounting and legal | 8,500.00 | \$8,000.00 | 11,000.00 | 11,550.00 |
| Membership commissions | 4,400.00 | \$5,200.00 | 6,000.00 | 6,300.00 |
| Telephone and fax | 2,000.00 | \$2,500.00 | 2,750.00 | 2,888.00 |
| Website and database | 4,000.00 | \$4,000.00 | 2,500.00 | 2,625.00 |
| Insurance contents | 2,000.00 | \$2,000.00 | 4,000.00 | 4,200.00 |
| Insurance officers and directors liability | 0.00 | \$1,000.00 | 1,200.00 | 1,260.00 |
| Other office (incl copier rental) | 12,384.00 | \$9,000.00 | 9,000.00 | 9,000.00 |
| Professional development and training | 3,500.00 | \$5,000.00 | 5,000.00 | 5,250.00 |
| IT support | 1,800.00 | \$2,500.00 | 2,500.00 | 2,625.00 |
| Board and Managers businesses meetings | 200.00 | \$700.00 | 1,000.00 | 1,050.00 |
| Rent | 22,500.00 | \$0.00 | | |
| Cost of retail VC goods | 1,500.00 | \$4,000.00 | | |
| <u>NEW EXPENSES</u> | | | | |
| Building maintenance | 0.00 | \$5,000.00 | 5,000.00 | 5,250.00 |
| Grounds maintenance, including shared w/fdc | 0.00 | \$3,000.00 | 3,000.00 | 3,000.00 |
| Janitorial | 0.00 | \$2,000.00 | 1,200.00 | 1,260.00 |
| Displays | 0.00 | \$1,000.00 | 2,000.00 | 2,100.00 |
| Security | 0.00 | \$1,500.00 | 1,500.00 | 1,575.00 |
| Loan repayment | | \$22,500.00 | 35,000.00 | 35,000.00 |
| Total Expenses | 157,912.00 | \$229,500.00 | 249,650.00 | 257,283.00 |



The Regional Visitor Info Centre

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EXECUTIVE SUMMARY

The Cowichan Regional Visitor Centre (CRVC) will be a collaborative project led and funded by the Duncan-Cowichan Chamber of Commerce and their funding partners, with support from the four other Chambers of Commerce in the region. The centre will also house the Duncan-Cowichan local Visitor Centre and Chamber offices. To maximize the full benefits of a central visitor centre it is best launched in conjunction with a regional marketing plan, supported by all sub-regions.

Two separate regional tourism strategies have been developed over the past four years: **“Tourism Cowichan Tourism Development Strategy” (2007) and the “Cowichan Region Tourism Plan 2010 – 2015”** have identified Key Issues related to:

- The need to upgrade Visitor Centres in the region and enhance their visibility.
- The need to streamline the provision of visitor services that are currently being offered by the region’s five community Visitor Centres under the Chambers of Commerce.
- The potential for regionalizing a range of tourism support functions, including visitor services, marketing, planning and development, while ensuring that communities have the capacity to maintain their own identities.
- Creating consistency in the messaging and raising the profile of the *region* as the destination, with communities acting as a hub for a regional experience.
- Increasing the ease with which the visitor can enjoy a regional experience and spreading the benefits of tourism throughout a wider area.
- Reducing promotion costs for tourism operators.

A new regional Visitor Centre and marketing plan are estimated to:

- Improve conversion rates by getting visitors to partake in more than one activity per visit
- Increase overnight stays
- Increase area spending
- Leverage other funding to directly support sub-region centres
- Reduce duplicated costs, resulting in lowering individual VC operating budgets
- Compete with other major destinations on the national and international stage
- Improve overall “Cowichan” experience to earn repeat users and stronger word-of-mouth promotion
- Attract new investments into the tourism sector

THE PROJECT:

The Cowichan Regional Visitor Centre (CRVC) is a central regional facility that will generate significant economic and community benefit due to its quality design, excellent highway location, information and visitor services, regional partnerships and central location in the Cowichan Region.

The new Cowichan Regional Visitor Centre project can be divided into two main components: a new park that will act as an entry for both the BC Forest Discovery Centre (FDC) and RVC, and the new RVC building, which sits on a triangular portion of land near the highway. The project will also be launched in conjunction with a regional marketing plan, supported in full by all five Chamber VC's.

The CRVC building will serve as a tourism information centre, a district cultural centre, Chamber of Commerce offices, and provide restroom facilities for travellers. The building features a kitchen space where local food can be showcased for cultural activities, and can be used by groups renting the building for private functions. A traditional British Columbia barn roof found throughout the Cowichan area inspired the building design. But, unlike a barn, the building will provide natural light and views to the outdoors through large sections of glazing.

The park is designed to draw people closer to the FDC building, providing an opportunity to retail more food and beverage and consumer items to visitors. It also creates a gateway to welcome people to the site and creates a link between the two buildings. From the park visitors will have partial views of the BCFDC grounds, which will help to lure guests that may not have normally stopped to see the centre.

Cohlmeyer Architecture was engaged to review the FDC and Cowichan Regional Visitor Centre project with fresh eyes after an earlier project had failed to move ahead. Consultation and planning sessions were held with the user groups to determine core needs, resulting in a site and building design that has been approved by the committee.

The building and site will be built using green principles and inventive energy saving techniques. Some key initiatives for the site include bicycle storage, natural habitat restoration, natural storm water control, and a reduction in pavement area without sacrificing the number of parking stalls. The building will be built using locally sourced and FSC certified materials and low VOC products will be used wherever possible. Heating will be provided by a solar-assisted in-floor heat system with a trombe wall to collect solar energy.

THE NUMBERS:

Total Project Cost: \$2,548,000 (Appendix A)

Funding Sources:

| | <u>Total</u> | <u>BCFDC</u> | <u>Chamber</u> |
|--|---------------------------|------------------|--------------------|
| ICET | \$744,000 | \$224,000 | \$520,000 |
| Misc Grants - BCFDC Rotary (75,000 in kind 23,000 cash | 102,000 | 98,000 | 4,000 |
| BCFDC Home Hardware (trees in kind) | 3,000 | 3,000 | |
| Chamber Financing | 450,000 | | 450,000 |
| District of North Cowichan (DNC) | 325,000 | 325,000 | |
| DNC - Tourism Grant | 115,000 | | 115,000 |
| RSP Gas Tax - CVRD Grant | 150,000 | | 150,000 |
| City of Duncan | 50,000 | | 50,000 |
| Total Funding Sources | <u>\$1,939,000</u> | <u>\$650,000</u> | <u>\$1,289,000</u> |
| CVRD new Request | <u>609,000</u> | | |
| | <u><u>\$2,548,000</u></u> | | |

Funding letters of intent have been received for the contributions from the various agencies, with the one exception as noted, and the loan financing from Island Savings Credit Union is secured, with an agreement in principle from the District of North Cowichan to guarantee the loan for \$400,000.

THE NEEDS ANALYSIS:

The current Duncan-Cowichan Visitor Centre requires a better location to provide improved service to visitors to the area. The Chamber has been searching for a suitable new location for more than six years. Several years of negotiation with the BC Forest Discovery Centre and local government representatives from the City of Duncan and the District of North Cowichan have now led to an agreement being reached to site the new Regional Visitor Centre at the Forest Discovery Centre with the support of Duncan and North Cowichan plus the Cowichan Valley Regional District. To facilitate the relocation and variance in land use, the Agricultural Land Commission has approved the transfer of land between the Municipality of North Cowichan and the BC Forest Discovery Centre.

With land agreements in place, the Duncan-Cowichan Chamber of Commerce Board of Directors approved a plan to proceed with design work, planning and implementation of a process to build a Regional Visitor Centre on the agreed site.

The circumstances recommending a centrally located RVC in Duncan are complicated by geography of the region and the needs of the partner Chambers in Ladysmith, Chemainus, Cowichan Lake and South Cowichan. The principles of individual Chamber identity and autonomy are key to the success of the Regional Visitor Centre initiative.

The Business Case Analysis for a RVC hinges on the establishment of successful two way partnerships between all parties, local governments, Chambers and funding agencies. The importance of the partnership is outlined in two separate regional tourism strategies that have been developed over the past four years.

The first is the **“Tourism Cowichan Tourism Development Strategy (2007)”** which focused primarily on visitor service delivery and organizational structure. Interviews and community meetings across the region showed support for the development of a regional visitor service function which creates a network of visitor centres, provides planning and development, and includes the marketing function. The report drew a number of situational conclusions related to servicing visitors to the region:

- Being located along two highway routes, the Cowichan region is well placed to capture larger numbers of visitors by using its location on the highways to its advantage.
- The proximity to both Nanaimo and Victoria, key entry points to the Island, provide more opportunities to attract an increased number of visitors with targeted campaigns.
- Visitor services across the region provide almost identical products in each location. With insufficient funding (most centres must do annual fundraising activities) and low staff levels, some of the administrative burden of the services could be regionalized.
- There was overall agreement that some form of a regional function will benefit the tourism industry on the whole while recognizing the desire for each community to maintain their own unique identities.
- The majority felt that this function should, at least for the first few years, be housed under the Economic Development Commission. (EDC)
- Providing regional emphasis information at gateway locations will result in more visitor traffic in every community.

- Visitors Centres should be upgraded and more visible to attract visitors to stop and enquire about the area. A site that is easily visible, accessible and a destination attraction could create a significant impact on highway travellers given the distance between locations in this rural area. Particular advantage should be taken in areas which may see different visitors who may not travel on Highway 1 into the core of the region such as Cowichan Lake, Shawnigan Lake or Chemainus.

THE BENEFITS:

A Regional Visitor Centre together with a Regional Tourism Plan encourages a process of streamlining the development and delivery of tourism services regionally. The underlying rationale for adopting a regional approach includes the following benefits from the Cowichan Region Tourism Plan 2010 – 2015

- There is a growing trend towards developing sub-regions as “destinations”, as this often reflects how visitors perceive the destination and how they plan their activities. The Cowichan has five distinct and complimentary regions that are perfectly situated to take advantage of this trend
- There is a preferential funding formula for clustered communities through the *Community Tourism Opportunities* program
- A regional plan will provide an opportunity to adopt a more integrated approach to planning. Through ongoing regional dialogue, common priorities and ways of working together can be facilitated in a manner that will create greater synergies and overall momentum.
- A coordinated regional approach to marketing will increase the destination’s profile in the market place through critical mass of product and an enhanced ability to differentiate the destination on the basis of regional distinctiveness. It will also provide greater opportunities for leveraging marketing funds and developing innovative packages.
- A regional organization is better positioned to share market knowledge and to increase the region’s ability to be responsive to emerging opportunities and threats. Moreover, a regional point of contact facilitates working relations with other outside organizations, the travel trade, the travel media, and potential investors.
- A regional approach to tourism planning and management creates enhanced opportunities to highlight the importance of tourism as a key economic sector within the region and to gain political leverage.
- Communities with a strong sense of place act as ‘honey-pots’ in the destination and will provide a stronger base for tourism businesses to build on. Spreading the benefits and generating visitor spend throughout the region is highly dependent on being able to market local distinctiveness and authenticity.

The two Regional Tourism Plans plainly show that a requirement for a centralized Visitor Services Strategy, supported by all five Chambers of Commerce is the means of survival for the Chambers of Commerce. The alternative is a certain reduction in services for individual Chambers and their Visitor Services combined with continued issues surrounding annual funding.

It is important that the Chambers work together under a recommended Memorandum of Understanding, support the Regional Tourism Organization model and look ahead to continuing their cooperative operation as they serve their own members locally and, in partnership with the other Chambers, serve the visitors to the region.

THE KEY ROLE - REGIONAL VISITOR SERVICES:

A cohesive and co-operative approach to delivering Visitor Services in the Cowichan Region will result in more successful promotion of our tourism product to all types of travellers who arrive here, whether for business or pleasure. With so many Visitor Centres operating in the Region, having a central “umbrella” organization providing support and direction will ensure delivery of the best possible service to our visitors.

This is a great opportunity to form a network of VC operators in the region. Revenue generating, issues management, growth ideas, (plus all of the following points) are just a few of the things that, with the combined talent in our Chambers and VC's, can be used to improve delivery of visitor services. The “umbrella organization” could be a coalition of all Chambers/VC representatives.

For many tourists, the VC is the first point of contact with the community, and will strongly influence first impressions. Planning for visitor information services is therefore extremely important. There are several components to internally promoting our tourism product and many advantages if all Visitor Centres are consistent in terms of:

- Staff Training: Product knowledge and the way in which it is delivered to the traveller are equally important.
- Communications: Develop a means to internally and externally communicate with all stake-holders to better educate the visitor on what to do in the area.
- Develop a consistent racking policy to encourage more operators to participate, and allow for every VC to share in the profits and to ensure that all VC's have all regional community guides and maps.

- Create a reliable tracking system for enquiries about local attractions (activities, events, food & beverage etc), separate from enquiries about BC attractions and develop a broader statistics collection system, including reports from all tourism sectors, to give a truer picture of who is coming, why they come, and how long they stay.
- Tour & Conference Planning with one location assists large groups planning tours or conferences in the region with accommodations, activities etc. (ex: Service Clubs, sports clubs)

WHAT ABOUT INDIVIDUAL or SUB-REGION VISITOR CENTRES?

A clearly understood goal in the move forward with the Regional Visitor Centre Project is that the other visitor centres in the region will continue to need support to service their local area members and visitors.

- It is anticipated that the new facility at the BC Forest Discovery Centre will become the flagship Visitor Centre for the region. Administration services associated with this Centre would be in the strongest position to coordinate the delivery of a regionalized visitor services program as outlined above.
- Assuming that services are regionalized, regional support should be added to the efforts being made by the Ladysmith Tourism Committee and the Ladysmith Chamber of Commerce to secure funding for the renovation of the train station as a new location for that community's Visitor Centre.
- The planning discussions raised the need for a new point of delivery for visitor information for visitors as they enter the Region from the south. The current visitor booth is constrained by visibility, location and size. A potential location on the Highway has been identified and consideration should be given to using the location for a roadside information kiosk or 'Gateway'.
- All partners commit to exploring funding options for the ongoing viability of providing the existing visitor information services across the region, especially those at Cowichan Lake and South Cowichan.
- The joint application between the VC's for multiple summer students will ensure a higher success rate of getting student funding.
- Reducing costs such as bulk purchasing (maps, postcards, books etc) through one location will save money and bulk ordering and shipping of out of town publications to one destination will be more economical.

THE MARKETING PLAN:

The Cowichan Region Tourism Marketing Plan 2010-2015 has identified ways in which the delivery of tourism can be supported through regional mechanisms, and opportunities for addressing local issues in a broader context can be utilized when applicable. A regional approach will encourage greater integration of the industry, and a more cost-effective and efficient approach to developing tourism and delivering related services.

The new Regional Visitor Centre will be a critical component in the plan, and it can be characterized as the pivot point in the regional plan. Its design is intended to be an attraction itself.

See Appendix B for the comprehensive Community Tourism Foundations and Tourism Cowichan Regional Marketing Plan (now currently a major component of the EDC Sustainable Cowichan Business Plan). This will be the guiding document for regional tourism marketing. Application is being made concurrently to Island Coastal Economic Trust by the EDC for funding to implement the critical and urgent parts of the marketing plan, many of which will be directly linked to and benefit the sub-regions in the CVRD.

OPERATIONS PLAN:

The core operations of the VC will be the servicing of visitors. This is provided through a number of ways, which include the following:

- Travel Counselling
- Bookings, Ticket sales
 - Tours
 - Accommodations – Hello BC system and local bookings
 - Bike rentals
- Computer Use for travellers
 - WIFI
 - Terminals
 - Online bookings

- Displays & Demonstrations. Live and interactive as well as static.
 - First Nations carvers, weavers etc
 - Wine, agritourism, Cittaslow etc
 - Wildlife
 - Historical
 - Regional Area displays – communities, Downtown Duncan etc
 - Cooking demos
 - Outdoor activities

- Relocation assistance
 - Personal
 - Business

- Training - Education
 - TVIC course
 - Tourism Product knowledge for all VC staff
 - Business education seminars
 - Hosting familiarization tours, tour busses

- Retail Sales

- Facility Rentals
 - After hours functions

- Community & Tourism Events promotion

- Business Centre
 - Racking
 - Business resource hub
 - Business and Chamber member meetings, seminars, networking etc

BUDGET:

The projected revenues and expenses of the operation have been summarized into a few main line items to demonstrate overall the financial sustainability of the VC.

Revenue:

| | |
|--------------------------|------------------|
| Membership & Commissions | \$118,000 |
| Rentals | 15,500 |
| Fundraising | 25,000 |
| Grants | 56,000 |
| Racking & Ads | 7,000 |
| Retail Sales | 8,000 |
| TOTAL Revenue | \$229,500 |

Expenses:

| | |
|--------------------------|------------------|
| Wages & Benefits | \$143,600 |
| Admin & Fixed Costs | 59,400 |
| Retail COGS | 4,000 |
| Finance Expense- LT Debt | 22,500 |
| TOTAL Expenses | \$229,500 |

Surplus \$0.00

APPENDIX A

BC FOREST DISCOVERY CENTRE + COWICHAN REGIONAL VISITOR CENTRE

PRELIMINARY COST REVIEW 25.October, 2011

SITE IMPROVEMENTS

| | | |
|---|-----------|------------------|
| Site Preparation | \$40,000 | |
| New Road & Parking Lot Improvements | | |
| green/permeable paving | \$51,000 | |
| asphalt topping, catch basins and lines | \$60,000 | |
| Revised Parking Drainage | \$40,000 | |
| Sewer | \$30,000 | |
| Site Lighting | \$150,000 | |
| Signage | \$20,000 | |
| Landscape Improvements | \$175,000 | |
| Trail Network | \$75,000 | * |
| East Parking Lot | \$100,000 | * |
| | ----- | ----- |
| ST | | \$741,000 |

30

BUILDING & EQUIPMENT

| | |
|-------------------------|-----------|
| Building & Services | \$829,000 |
| Furnishings | \$40,000 |
| Sustainability Upgrades | \$35,000 |

ST **\$1,645,000**

CONSTRUCTION AND CONTINGENCY

| | |
|--|-----------|
| General Contractor Overhead & Profit @ 10% | \$164,500 |
|--|-----------|

ST **\$1,809,500**

| | |
|-----------------------------|-----------|
| Contingency Allowance @ 10% | \$180,950 |
|-----------------------------|-----------|

31 ST **\$1,990,450**

| | |
|------------------------------------|----------|
| LEED Performance Capital Cost @ 5% | \$99,523 |
|------------------------------------|----------|

PROJECTED CONSTRUCTION CONTRACT VALUE **\$2,089,973**

| | |
|------------------------------|-----------|
| Drinkwater Road improvements | \$100,000 |
|------------------------------|-----------|

PROJECT CAPITAL CONSTRUCTION COST **\$2,189,973**

Rounded Subtotal **\$2,190,000**

FEES AND SERVICES

| | |
|--|--------------------|
| Sub-Division Costs | \$20,000 * |
| Consulting Fees | |
| Pre-planning and preliminary design | \$25,000 |
| Architectural + Landscape Architectural - 8% (includes Architecture, Landscape Architecture, Structural, Mechanical, Electrical Engineering) | \$163,000 ** |
| Civil Engineering & Coordination | \$25,000 |
| Geotechnical & Environmental Engineering & Coordination | \$25,000 |
| Consulting Disbursements & Travel Time | \$30,000 |
| LEED Certification & Commissioning | \$70,000 *** |
| | ----- |
| TOTAL | \$2,548,000 |

32

NOTES

* Values established in the REB estimation of probable cost.

** Fee has been reduced by \$12,500 because design and planning closely reflect the design presented in the outline report of findings.

*** LEED Certification costs will be approximately \$50,000, and commissioning costs will be approximately \$20,000.



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APPENDIX 'B'

**Cowichan Region Visitor
Centre Business Plan**

Community Tourism Foundations® Program

COWICHAN REGION
TOURISM PLAN
2010 - 2015

April 2010

Ministry of Tourism, Culture & the Arts Representative:

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1. Introduction and Purpose of Plan

The development of this **Regional Tourism Plan** for Economic Development Cowichan¹ was facilitated through Tourism British Columbia's *Community Tourism Foundations*® program². The process of facilitation was undertaken by Tourism Planning Group.

Responsibility for the development and delivery of tourism services and infrastructure in the Cowichan Region lies with a wide range of local and regional public and not-for-profit organizations. Steps have been taken to establish a regional approach to marketing through Tourism Cowichan, and there is a growing recognition of Cowichan as a 'destination' in the marketplace. This has been achieved primarily through regional branding, the development of a regional travel planner, and the emphasis on positioning Cowichan as a regional destination in consumer travel shows, regional promotional campaigns, and Tourism Vancouver Island's vacation planning material.

This Regional Tourism Plan seeks to build on this platform. It is concerned with identifying ways in which the delivery of tourism can be supported through regional mechanisms, and opportunities for addressing local issues in a broader context can be utilized when applicable. A regional approach will encourage greater integration of the industry, and a more cost-effective and efficient approach to developing tourism and delivering related services. A key success factor in moving forward will involve sustaining the process of regional dialogue that characterized the planning discussions for this Plan.

While it is envisaged that Tourism Cowichan will take a lead in overseeing the implementation of this Plan, the audience of this document should also include other local and regional agencies and tourism businesses as moving forward successfully will require various levels of collaboration.

1.1 Review of Tourism Planning in the Cowichan Region

There has been a number of tourism planning reviews in recent years at the regional, sector and community levels. This Regional Tourism Plan has sought to consolidate many of the recommendations that have been made in the past and to encourage a stronger level of stakeholder resolve to moving forward with implementation. Prior planning initiatives include the following³:

- *The Cowichan Region Economic Development Strategy (2002)* – recommended a number of regional tourism initiatives, including developing a regional tourism action plan and a regional tourism marketing strategy, and the establishment of a new regional tourism organization. The latter initiative became the fore-runner of today's Tourism Cowichan.
- *The Commercial Marine-Based Tourism Study Report (2005)* – recommended the need to focus on expanding infrastructure for the marine tourism industry, resolving associated land issues, ensuring an integrated approach to planning, providing additional business support services for the development of the sector, and developing a marine tourism marketing strategy.
- *The Tourism Cowichan Tourism Development Strategy (2007)* – recommended an expanded model of Tourism Cowichan for service delivery and industry development, which included the implementation of a visitor centre services network strategy.

¹ Economic Development Cowichan provides economic development, tourism marketing and film attraction services for the Cowichan Valley Regional District.

² On April 1st 2010 Tourism BC was incorporated into the Ministry of Tourism, Culture and the Arts. Programs formerly delivered by Tourism BC are now being delivered by the Ministry. Reference to Tourism BC in this document is a historical reference and represents the organization then responsible for the program or service cited.

³ See Appendix 1 for further detail on the various planning processes.

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- *Ladysmith Tourism Plan (2006)* developed through Tourism BC's *Community Tourism Foundation* program. The plan identified a series of tactics designed to strengthen tourism at the community level.
- *The Highways and Roads Tourism Signage Program for the Cowichan Valley Regional District (2007)* – highlighted a range of issues associated with signage and identified the need for a regional signage program that would see tourism visitor signage as an integrated component of tourism policies on information, promotion and regional development.
- *Duncan Tourism Development Plan (2009)* developed through the *Community Tourism Foundation* program. This plan identified a series of tactics to strengthen the tourism industry locally while recognizing the need to focus on regional planning issues and the implementation of recommendations from previous strategies. It proposed an expanded role for Tourism Cowichan and recommended restructuring the organization to increase its overall relevancy.

In addition to these reports that have focused specifically on aspects of the tourism industry, there are a wide range of relevant tactics in the various Official Community Plans and local strategies throughout the Cowichan region that recognize the significance of tourism and promote infrastructural priorities that would benefit the tourism sector.

1.2 Rationale for a Regional Approach to Tourism

This Tourism Plan consolidates relevant proposals from earlier planning initiatives. It encourages a process of streamlining the development and delivery of tourism services regionally and moving forward with the implementation of various existing recommendations. The underlying rationale for adopting a regional approach includes the following factors:

- Tourism is already a regional function of the CVRD, with Economic Development Cowichan (EDC) and Tourism Cowichan having direct responsibility for promoting and developing the Cowichan Region as a destination. While EDC has commissioned tourism related studies in the past, the development of a regional strategy to guide the overall direction of tourism has yet to be undertaken. This Regional Tourism Plan seeks to address this gap and to provide a 'road-map' for strengthening the tourism economy.
- There is a growing trend towards developing sub-regions as 'destinations' as this often reflects how visitors perceive the destination and how they plan their activities. Examples of this trend in BC include the planning and promotion activities associated with the Shuswap and North Vancouver Island.
- There is a preferential funding formula for clustered communities through the *Community Tourism Opportunities* program.
- A regional plan will provide an opportunity to adopt a more integrated approach to planning. Through ongoing regional dialogue, common priorities and ways of working together can be facilitated in a manner that will create greater synergies and overall momentum.
- A coordinated regional approach to marketing will increase the destination's profile in the market place through critical mass of product and an enhanced ability to differentiate the destination on the basis of regional distinctiveness. It will also provide greater opportunities for leveraging marketing funds and developing innovative packages.
- A regional organization such as Tourism Cowichan is better positioned to share market knowledge and to increase the region's ability to be responsive to emerging opportunities and threats. Moreover, a regional point of contact facilitates working relations with other outside organizations, the travel trade, the travel media, and potential investors.

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- A regional approach to tourism planning and management creates enhanced opportunities to highlight the importance of tourism as a key economic sector within the region and to gain political leverage.

Ultimately, it is anticipated that working in a more coordinated regional manner will generate cost-efficiencies, improvements to visitor services, increased market exposure, and the likelihood of overall growth in the tourism economy.

1.2.1 The *Community Tourism Foundations* Regional Planning Process

The need for a regional planning process was outlined in an Expression of Interest submitted by Economic Development Cowichan to Tourism BC in 2009, and consultations with the industry commenced in December 2009. Over 60 stakeholders participated in the various discussions during a four month period, including representatives from the accommodation sector, the arts and cultural heritage sector, agritourism and viticulture, the marine sector, golf, visitor attractions, nature-based operators, Chambers of Commerce and community organizations, Vancouver Island University, local and regional government, First Nations, Tourism Cowichan, Tourism Vancouver Island and Tourism BC. Following a region-wide full-day workshop in December that reviewed the current situation, four community working groups and five sector working groups were established to look at particular elements of the regional tourism industry. Feedback from all of these groups was integrated into further discussions that were held in four community workshops conducted in early February 2010. Given the pending transition of Tourism BC into the Ministry of Tourism, Culture and the Arts, the availability of funding and time for additional input were both somewhat constrained.

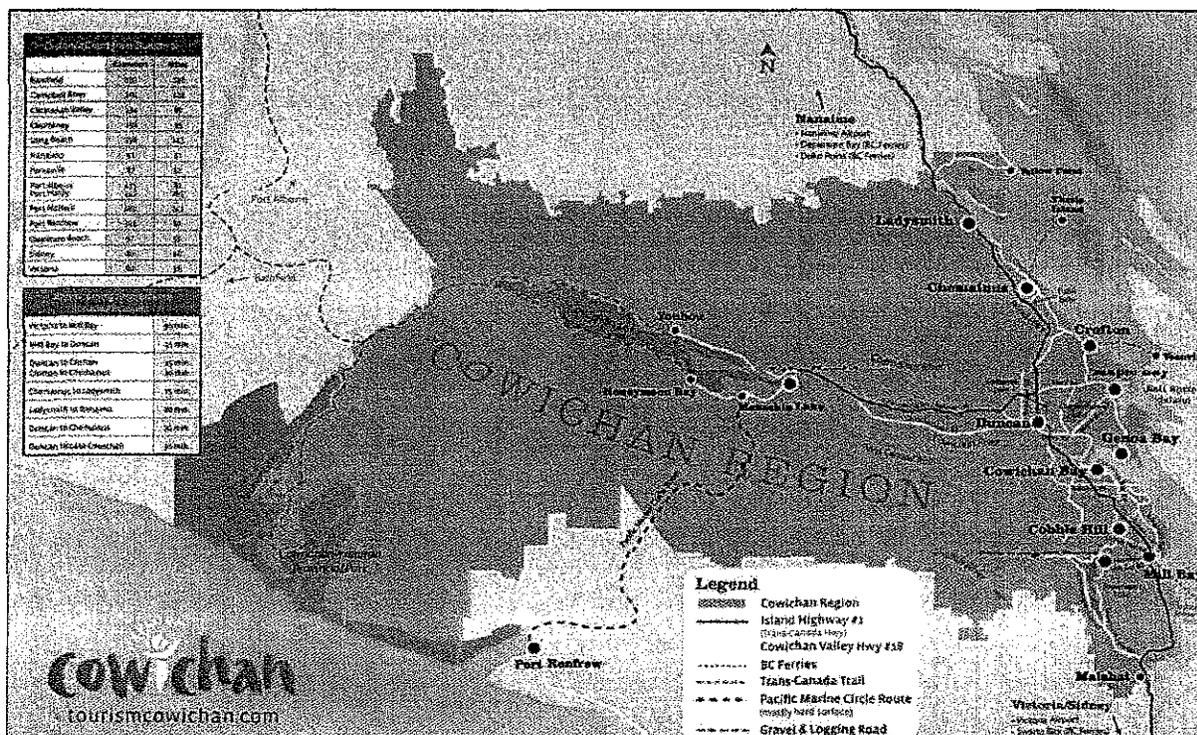
A key priority in the process was to move forward with strengthening Tourism Cowichan as the lead tourism organization within the region, and efforts focused on developing a plan that would assist Tourism Cowichan in its enhanced role. Implementation is highly dependent on the level of collaboration and new funding that can be secured. Regular review and reassessment of strategic priorities should occur as resources become available and the process of working collectively gains momentum.

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2. Tourism in the Cowichan Region

2.1 The Opportunity

The Cowichan Region is located between Victoria and Nanaimo and has a population of 77,000. It extends along the east coast of Vancouver Island to south of Mill Bay and north of Ladysmith, and includes Nitinat Lake and the old-growth wilderness of Carmanah Walbran Provincial Park on the west coast. The region offers a wide array of visitor experiences associated with the pristine marine environment east and west; the region's lakes, rivers, low-rise mountains and temperate rainforests; the fertile agricultural landscapes and viticulture; the local arts, culture and heritage, including Aboriginal cultural tourism product; the growing range of sport facilities and golf; and the local retail centres and boutique shopping opportunities associated with the communities of Ladysmith, Chemainus, Crofton, Maple Bay, Genoa Bay, Cowichan Bay, Duncan, Cobble Hill, Shawnigan Lake, Mill Bay and Lake Cowichan. The region's temperate maritime climate (as encapsulated in the original meaning of the name "Cowichan" – *The Warm Land*), its colourful history, and its proximity and accessibility to large near-in regional markets are all factors that contribute to the potential competitiveness of the destination.



2.1.1 Overview of Current Situation

The workshops and the feedback from the working groups provided an opportunity to assess the current status of the tourism industry and its operating environment. A summary overview can be found in Appendix 3. While the material presented does not purport to be a comprehensive statement of the industry, there has been sufficient consensus on a range of strengths and areas of concern and stakeholder discussion on possible tactics to form the recommendations that are outlined in this Plan.

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2.2 Focus of the Regional Tourism Plan

The underlying objective of the Regional Tourism Plan is to strengthen Cowichan's position as a year-round destination and increase the value of tourism to the economy in a sustainable manner. This is in keeping with an existing vision statement developed by the Economic Development Commission that states:

The Vision is for the Cowichan Region to be a highly successful tourist destination offering high quality tourism experiences for all our visitors⁴.

The Plan recommends that the tourism industry stakeholders and funding partners commit to a stronger regional tourism function to be delivered through Tourism Cowichan and Economic Development Cowichan, and that the focus of attention at the outset is on securing new core funding. Through an increase in funding, the role of Tourism Cowichan can be expanded to enable it to take a more effective lead in developing and promoting tourism within the region and to play a key role in the implementation of this Plan. Given the regional emphasis and the rationale for adopting a regional approach, the strategies and tactics outlined in this Plan focus primarily on regional initiatives that will enhance the market positioning of Cowichan and will increase the value of tourism throughout the region. This does not negate the need to look at tourism from a community perspective and to identify tactics that strengthen it locally, as the market competitiveness of Cowichan is ultimately in the quality, distinctiveness and integration of the local attributes and visitor experiences.

The following section of the Tourism Plan focuses on organizational and funding priorities. Assuming a stronger commitment to collaboration and the availability of incremental core funding for a regional tourism function, the remainder of the section presents an overview of tourism management roles that should be embraced at the regional level. Section 4 identifies a range of infrastructural and support services that require regional collaboration as the basis of implementation. Many of these initiatives have been proposed in previous reports and planning discussions, but the momentum and resources to move forward have been insufficient. In Section 5 a series of strategies designed to strengthen the region's key product areas are recommended. Cowichan has a strong natural and cultural resource base, and there remains considerable potential to expand and diversify the range of tourism experiences and to increase the overall degree of market readiness. Section 6 focuses on regional marketing strategies and tactics. Tourism Cowichan has a well developed marketing program and this section reinforces the need to maintain current levels of activity and highlights areas where further emphasis and resources are needed.

It must be emphasized that this is a five-year Plan and presents a framework for building a sustainable tourism industry. It should be viewed as a working document and a point of reference for developing annual operational plans. While the level of available funding and the degree of collaboration will play a significant role in determining what can be implemented, ongoing attention needs to be paid to the operating environment and the changing dynamics of the marketplace. A commitment to regular planning and review will ensure that the implementation of this Plan remains appropriate to the circumstances and opportunities facing the industry.

⁴ Economic Development Commission, 2006, Tourism Action Plan Summary.

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3. Tourism Management

While Tourism Cowichan takes an effective lead in the marketing and promotion of Cowichan, all other aspects of tourism planning and development and the delivery of visitor services are undertaken in an uncoordinated manner by a range of local and regional governments and community organizations. At a time when jurisdictions elsewhere are looking at new approaches to building competitive destinations and are seeking to implement a more holistic style of management that is concerned with all aspects of the tourism industry, the current practices in the Cowichan region are potentially undermining the longer-term sustainability of the industry. The following gaps in the system have been noted:

- Regional marketing is taking place but there is often a 'disconnect' with local messaging.
- Tourism Cowichan is currently promoting a regional destination but there is limited consistency in visitor information services – (this was identified in the 2007 Tourism Cowichan Tourism Development Strategy). Tourism businesses have to pay multiple fees to list in all Visitor Centres.
- There is no strategic approach to regional product and sector development. Economic Development Cowichan plays a facilitating role where possible, but implementation of initiatives is often fraught with issues that range from lack of funds to the implications of dealing with multiple agencies.
- There is no commitment to monitoring performance across the region. The only data that is available relates to room revenue as reported by BC Stats.
- Training programs within the region are generally not coordinated and there is limited mentorship for tourism entrepreneurs.
- A regional tourism product inventory is in place but is incomplete.

These deficiencies and the lack of resources to address them effectively are well recognized by many stakeholders. However, as already noted, implementing change and moving forward with a regional approach is highly dependent on a renewed and expanded commitment to working together regionally and the availability of increased core funding. Indeed, without change in these areas the implementation of this Plan will be severely constrained and the ability to realize the potential of new product development opportunities will be substantially reduced. Moreover, as destinations elsewhere locally and provincially adopt a more strategic approach to positioning themselves, there is a growing danger that the individual communities and range of product within Cowichan will get 'lost' in a marketplace that has become increasingly 'busy' and competitive.

The initial two strategies in this section focus on the critical factors of collaboration and funding, while the remainder defines new roles in tourism leadership and destination management practices that should be undertaken regionally as a means to supporting individual business operations and the industry as a whole.

3.1 Role of Tourism Cowichan

Develop a stronger regional tourism function through strengthening Tourism Cowichan and its underlying capacity to represent the interests of the regional tourism industry.

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There is a high level of support for strengthening Tourism Cowichan as the lead regional tourism organization. While the options for restructuring were considered carefully, there was a general understanding that without new core funding there was little to be gained from developing an elaborate Council structure at this initial stage. Rather, the first step should be to establish a new Tourism Advisory Committee for Tourism Cowichan that becomes a strong 'champion' for regionalization and has the capacity to act as a catalyst in the implementation of regional initiatives, particularly those that have been at proposal stage for some time.

Specifically, the Committee will focus on:

- Maintaining the current regional dialogue and becoming a regional 'voice' for the tourism industry;
- Identifying and reviewing all sources of new funding and funding models for a regional tourism function, and recommending tactics to pursue specific opportunities;
- Working with the wider industry to advocate for a regional approach and supporting Tourism Cowichan in its current activities; and
- Reviewing alternative governance models for Tourism Cowichan in anticipation of a stronger funding formula.

The current operational relationship that Tourism Cowichan has with Economic Development Cowichan will assist in strengthening a holistic approach to tourism development and in facilitating the implementation of initiatives that are dependent on regional public sector support.

In the initial phase, it is imperative that this Tourism Advisory Committee has a strong Chair-person and reflects a range of regional and community interests. All members should be committed to promoting the value of a regional function and to the core activities outlined above. Highlighting the importance of working in collaboration on regional initiatives does not detract from the need to plan and develop tourism locally. Rather, it creates new opportunities to complement and strengthen what is happening at the community level, and to ensure a more integrated approach to building on regional strengths and addressing areas of weakness.

TACTICS:

- EDC/Tourism Cowichan develops Terms of Reference for the Tourism Advisory Committee.
- EDC recruits Committee members to reflect a range of community and sectoral interests and appoints the initial Chair.
- Continue to encourage the strengthening of local tourism structures that can facilitate the development of tourism at the community level. As the Tourism Cowichan structure evolves, representation of these local tourism structures in a regional body will become a critical process for highlighting community priorities at a regional level and will set the stage for developing local/regional, public-private partnerships.
- Review governance models in anticipation of the Tourism Advisory Committee evolving into a structure with executive authorities should funding increase significantly.
- Should new core funding become available, undertake a visioning workshop and update the vision statement for the region.

3.2 Funding

Pursue new core funding to facilitate developing a broader role for Tourism Cowichan.

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There is significant potential to expand the role of Tourism Cowichan as a regional lead tourism organization in a way that will increase its ability to support the wider industry and to act as a catalyst in facilitating product development and industry growth. However, with the current funding and staff time that is available (a half-position and \$120,000⁵ from the CVRD to cover all operational and marketing costs), it is not possible to broaden the mandate. Although Tourism Cowichan has been highly successful at leveraging these limited funds, the emphasis has focused primarily on marketing and promotion. The end result is a regional/local tourism system that is characterized by both gaps and duplication in tourism management roles. This duplication of effort, the loss of efficiencies through economies of scale, and the lack of strategic coordination undermine the competitiveness of the industry as a whole. Indeed, without additional funding in place to develop and promote tourism in a more strategic manner, the best that can be achieved through the implementation of this Plan is an enhanced local and regional awareness of the significance of tourism and a new momentum to maintain regional dialogue and consensus building. Although these achievements will represent progress, the added value that can be gained through expanding the role of Tourism Cowichan is considerable.

The initial task of the new Tourism Advisory Committee will be to identify potential new sources of core funding. A key source of funding that over 50 communities have pursued in the province is the 2% Additional Hotel Room Tax⁶. This option has elicited strong opinions within the region, and its implementation will only be successful if it has the necessary level of support from the accommodation sector. This tax is under review by the Province, and while it may be renamed, it is unlikely to be displaced as an option for raising community funds for tourism marketing and development.

TACTICS:

- Task the Tourism Advisory Committee with identifying potential new sources of core funding and developing an action plan to pursue funding that is considered appropriate for the Region. The Committee should explore the following options in developing a funding model:
 - Membership fees
 - ◁ This is only relevant if Tourism Cowichan is to become a membership-based model – the cost of pursuing members needs to be factored into this option together with the local Chamber/Tourism Cowichan relationships);
 - A portion of each business license
 - ◁ Can only be administered by municipalities⁷. Businesses in the Electoral Areas would be exempt.
 - Revenue streams based on new business activity, such as a centralized reservations service.
 - ◁ This option has costs associated with meeting the requirements set by Consumer Protection BC that need to be reviewed. For further detail refer to:
<http://consumerprotectionbc.ca/businesses-travel-services-home/do-i-need-a-licence>.
 - Voluntary contributions such as a pillow levy.
 - ◁ The reliability of funds from year to year and the ability to 'collect' can be an issue. Discount incentives for cooperative marketing initiatives can be used to encourage

⁵ This level of funding has remained static since the introduction of a regional funding policy for tourism through the CVRD in 2003.

⁶ Including 14 jurisdictions on Vancouver Island.

⁷ This option is already used by the Town of Ladysmith as a source of revenue for funding the Visitor Centre.

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participation.

- The 2% Additional Hotel Room Tax
 - ◀ Choosing not to pursue this option will have limited impact on the consumer price for accommodation-only products. The current tax levied on accommodation amounts to 8% Hotel Sales Tax plus 5% GST for a total of 13%. The 2% AHRT would raise this total to 15%. With the introduction of the Harmonized Sales Tax and the rescinding of the Hotel Sales Tax on July 1st 2010, the total tax on accommodation will amount to 12%. A further 2% AHRT would raise the total to 14% – a 1% increase on current taxes on accommodation costs⁸.

A key to developing a funding strategy is to have a well developed business plan that clearly shows the benefits that will accrue from the proposed course of action. Based on practices elsewhere, the 2% AHRT remains the most viable option for creating a relatively consistent stream of incremental core funds. However, there is no reason why other options cannot be considered in a blended formula.

- Should a decision to pursue the 2% AHRT be made, consideration will have to be given to the application process. The initiative would require either the CVRD to take a lead with agreements in place regarding a partnership model with the municipalities, or Tourism Cowichan to apply as a 'special entity'.
 - Tourism Cowichan was initially established under the BC Society Act and has retained its society status. With a stronger governance model and a clear definition of geographic scope, the application could be pursued through Tourism Cowichan for the entire region, with Tourism Cowichan having responsibility for receiving and disbursing the 2% AHRT funds. It is recommended that under this approach a funding formula is developed that ensures a proportion of the funds can be channelled to community tourism projects.

The remainder of this Plan outlines a series of strategies that no one organization in the Cowichan region has, as yet, embraced. While considerable effort has gone into various tourism related initiatives across the different communities, there has only been a limited attempt to implement regionalized activities that would create economies of scale, efficiencies and a more strategic focus for the industry as a whole.

3.3 Management Systems

Develop management systems that will ensure the industry has a current understanding of market trends, visitor expectations, product development and funding opportunities.

A market-oriented industry is one that is based on a sound understanding of market trends and has the ability to respond proactively to emerging opportunities and address identifiable weaknesses and unexpected crises in a timely manner. An appreciation of market trends, visitor expectations, product developments in adjacent regions, and government funding and policy initiatives are all critical in this process and can offer valuable opportunity to gain leverage. Tourism Cowichan can play a distinct role in maintaining this market-focused approach through taking on a range of functions that individual tourism operators are not in a position to do on their own. These 'destination management' functions include:

- Ongoing strategic tourism planning;

⁸ The most recent tax bulletin indicates that the HST will now be applied to both the room charge and the 2% AHRT. This is a federal requirement.

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- Monitoring, measuring and evaluating market trends and local industry performance;
- Integrating tourism interests and objectives with economic development and land-use planning processes;
- Facilitating investment and business development in tourism consistent with the region's vision for tourism; and,
- Ensuring an enabling environment for quality improvement in product and human resource skills.

While the lead tourism organizations at the community level could perform these roles to some degree, there is much greater scope for cost-efficiencies and strategic integration of tourism with other regional and community plans and policies through managing these functions at a regional level.

TACTICS:

- Continue to work on maintaining a comprehensive electronic database of product inventory and related tourism services. This should be developed at the local level and passed on to Tourism Cowichan. Include product/service description, key contact name and contact details (including e-mail address, mailing address and telephone number), and expand in a way that allows for the identification of potential development and marketing opportunities. Keep the Ministry of Tourism, Culture and the Arts (MTCA) and Tourism Vancouver Island (TVI) informed of changes to the product inventory.
- Tourism Cowichan is currently producing a stakeholder newsletter. This initiative should be maintained and can be used to disseminate information relating to new product, market trends, emerging opportunities, training programs etc.
- Work with TVI and MTCA to encourage further participation in existing research programs. To be effective in implementing this tactic, local tourism organizations and Chambers will have to assist in raising awareness regarding the importance of stakeholder involvement. The following two programs are reliant on cooperation from the accommodation sector and generally require significant encouragement to initiate participation.
 - Work with local accommodators and campground owners to implement the *Value of Tourism Model*. This project in particular will benefit from local 'champions' to generate stakeholder commitment. The core data collection component of the model is based on an accommodation survey that gathers the most recent annual performance data from all commercial accommodation operators, including campgrounds. Through the use of local, regional and provincial population and tourism indicators, in conjunction with the community accommodation performance data, it is now possible to make an informed estimate of the total number of visitors (overnight, day, and visiting friends and relatives) and their expenditures in the community. With this model, all information provided by the accommodation sector is submitted directly to MTCA, and is only used for the purposes of estimating tourism contribution to the local economy. The data is aggregated to ensure anonymity and confidentiality.
 - Similarly the regional tourism industry would benefit from increasing its participation in MTCA's Provincial Accommodation Survey. This program is based on a minimum of five reporting properties and requires each to submit their occupancy and average daily room rate for the preceding month and a forecast for the next three months direct to MTCA. Participation in this program has been expanded to include campgrounds. Participating properties and Tourism Cowichan would receive a copy of the regional forecast report each month, which would assist in overall business planning and marketing.
 - Consider incentives such as discounts in partnership marketing programs in the initial phase

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of implementation.

- Report aggregated results to the wider tourism community as and when available. Report value of tourism to the key public sector stakeholders and keep local media informed to ensure that performance is reported to local residents.
- Explore opportunities to partner with TVI for the purpose of undertaking research.
- Develop marketing feedback systems that will demonstrate return on investment and will assist operators in becoming more targeted in their marketing operations.
- Commit to ongoing strategic planning with annual reviews to assess progress and establish new priorities.

3.4 Customer Service

Work toward improving customer service through increasing relevant skills within the tourism sector and encouraging appropriate certification.

The importance of quality service and the need to deliver a visitor experience that is in keeping with market expectations are fundamental elements of building a competitive destination. To play an effective role in destination management and industry development, Tourism Cowichan should promote opportunities for improving customer service and the region's ability to 'host' visitors and deliver experiences that meet market expectations. This can be achieved through facilitating access to appropriate training and professional development programs for stakeholders, and highlighting certification programs that focus on improving customer service or differentiating product on the basis of specific criteria that may be of interest to the target visitor.

TACTICS:

- Tourism Cowichan should play a role in highlighting available programs and promoting workshops with partners such as TVI, Go2, MTCA and Retail BC. Work with the Chambers of Commerce and Community Futures to host relevant workshops.
 - MTCA's WorldHost® Training Services continues the *SuperHost*® legacy by offering a series of eight dynamic and interactive customer service-based training workshops to support people working in service industries. For further detail see: [http://www.tca.gov.bc.ca/WorldHost/pdfs/WorldHost Q and A corp.pdf](http://www.tca.gov.bc.ca/WorldHost/pdfs/WorldHost%20Q%20and%20A%20corp.pdf).
 - The MTCA *Tourism Business Essentials* program provides a series of guide books on key aspects of running a tourism business, and five specific workshops: Tourism Packaging and Product Distribution (Introductory and Advanced), Travel Media Relations, Ads and Brochures That Sell, and Sport Tourism.
 - The *emerit* certification program offers owners, operators and employees an excellent opportunity to gain recognition for existing knowledge and experience in a wide range of tourism sectors. This program is recognized across Canada and raises the standard of excellence in the delivery of tourism. The training is structured in such a way that individuals can receive recognition at different levels of their career and includes the Tourism Essentials Certificate, the Occupational Knowledge Certificate, the Occupational Experience Certificate and the Professional Certification Certificate. For further detail see www.emerit.ca.
 - Retail BC offers workshops that include Selling Memories and Serving World Customers, both of which would strengthen the retail sector as an integral component of the visitor

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experience.

- Promote relevant funding opportunities such as the Workplace Training for Innovation Pilot program that is currently open for application. This program provides small business and not-for-profit employers access to funding to support employee training and offers up to \$1,500 per employee – to a maximum of \$5,000 per employer.
- Encourage ALL accommodation properties to participate in the MTCA Approved Accommodation program. This approval process not only increases their exposure in the marketplace through HelloBC.com and the Accommodation Guide for the province, but it also ensures that property owners have met minimum requirements in relation to cleanliness and state of repair. Only approved properties should be included in Tourism Cowichan's promotional material.
- Promote the value of participating in relevant certification programs.
 - The Canada Select™ program is Canada's only national accommodation rating program and has been applied to hotels, motels, inns, resorts, condominiums, B&Bs, and campgrounds. The program provides visitors with a nationally consistent standard of quality within each accommodation category and assists visitors in making choices that are in keeping with their expectations.
 - The BC Agritourism Alliance offers a quality assurance program. Accreditation provides operators with the ability to use the BC Agritourism accreditation logo, access to the Highway Sign Program, and preferential rates for marketing through the Alliance.
 - The Culinary Tourism Society BC offers an accreditation program to all food service establishments, culinary retail shops, tour operators and specialty culinary tourism experiences. The Society has developed ten core certification criteria that relate to the use of BC product, service/hospitality, value, uniqueness, quality, integrity, informative experience, 'enviro' sustainability, 'local favourite', and cultural/authentic factors.
 - The Pets can Stay™ travel services provides a national certifying and marketing body that has established standards and guidelines for accommodation providers that cater to the rapidly growing pet travel market. This program was piloted initially by Tourism BC, but now extends to all of North America.

3.5 Tourism Awareness

Build a greater awareness of and appreciation for the tourism industry as a key component of the regional economy.

Building a competitive tourism industry requires support from the entire community – residents, businesses and politicians alike. A general lack of awareness will undermine potential support and can create challenges that will constrain the industry's growth. Given the significance of tourism to the region's economic base, it is essential that there is a strategy in place designed to build an understanding of the benefits that are being derived from this sector.

TACTICS:

- Creating awareness occurs at many different levels and should start by focusing on the tourism industry itself. The regional meetings that have occurred through the planning process have generated the type of dialogue that needs to be maintained. This can be facilitated through networking events and workshops.
 - Initiate a program of networking events (one or two per annum) at specific sites and

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attractions. Use the event to raise awareness of the particular attraction. Consider developing a hosting policy with funding assigned to the initiative. Events of this nature will assist in informal cross-marketing and should also be promoted to front-line staff within the wider business community and to Visitor Centre staff in neighbouring regions.

- Promote attendance at TVI's annual AGM and conference.
- Focus on building awareness within the local population. Local residents will have a substantial impact on the activity patterns of visitors who fall into the category of 'visiting friends and relatives', and tactics need to be in place that will assist residents in being effective hosts.
 - Consider developing a "Be a Visitor in your own Region" and promote locally and regionally. Work with local operators to create viable incentives that will encourage visitation. This type of initiative is highly successful in Victoria.
 - Encourage local community organizations and service clubs to feature presentations on tourism and its benefits at local networking events.
 - Establish working relations with Cowichan Valley School District 79 and Nanaimo-Ladysmith School District 68 and explore ways of promoting tourism and related opportunities in the schools.
- Work with local media on an ongoing basis to enhance knowledge and understanding of the tourism industry and its value to the economy.
 - Develop regular press releases for the local press and radio on tourism 'stories' of interest and the overall tourism economy. Use these opportunities to reinforce the concept of a regional tourism industry.
 - Use the media to highlight research findings as and when they become available, including the value of tourism.
- Present Tourism Cowichan's annual tourism development and marketing plan to the Municipal Councils, the Regional District Board, and the Economic Development Commission.

3.6 Responsible Tourism

Encourage further adoption of environmentally sustainable business practices.

The concept of sustainability has become a cornerstone of government policy in British Columbia. The establishment of the *BC Partnership for Sustainable Tourism* in February 2009 (operating as ETHOS) is further indication that the Province and industry leaders together are committed to promoting appropriate action that will increase the overall sustainability of the industry and enhance the 'green positioning' of British Columbia as a destination in the global market place. Through the launch of a new website in January 2010 (www.ethosbc.com), the partnership is seeking to promote sustainable practices which are measurable and practical. This website has been established to act as an industry networking mechanism and a comprehensive resource centre with tools and information to assist small and medium-sized businesses in their business operations. A basic network membership is free and benefits include a travel calculator for businesses to imbed on their website to encourage travel related offsetting that invests in projects taking place in British Columbia.

This emphasis on positioning BC as a green destination coincides with changing market trends as international visitors increasingly look for tourism operators that practise responsible tourism. This trend has become particularly evident in the European markets and responding to these trends should be a strategic priority for the Cowichan region. In time, many of these practices will be assumed as the new norm.

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TACTICS:

- Highlight examples of best practice to the industry and build an awareness of general trends in sustainability. *Green your Business: Toolkit for Tourism Operators*⁹ has a wide range of initiatives and practical steps that small and medium sized tourism businesses can begin to implement. The handbook has been designed for multiple tourism sector audiences and provides suggestions and case studies that have been arranged by tourism sector, business process, and the needs of small and medium sized enterprises. Similarly, MTCA's Tourism Business Essentials guidebook series publication, *Environmentally Responsible Tourism*¹⁰, is a practical guide that will assist businesses in making financial savings and gaining a competitive edge when marketing to consumers with increased environmental awareness and demands.
- ETHOS, in partnership with *Climate Smart*, has recently launched a new training initiative for small businesses to assist in identifying practices that will reduce the carbon footprint of tourism operations.
- Encourage wider participation from the accommodation sector in the national Green Key Eco-Rating program – (current participants include the Best Western Chemainus Festival Inn with a rating of 4, and the Travelodge Silver Bridge Inn with a rating of 2). This program is based on a graduated rating system designed to recognize hotels, motels, and resorts that are committed to improving their fiscal and environmental performance. It assists participants with opportunities to reduce operating costs and environmental impacts through reduced utility consumption, employee training, and supply chain management. The program has considerable value as an awareness tool, although it is based on self-verification. ETHOS is currently working on developing an appropriate rating scheme for BC that will involve a more rigorous process of assessment.
- Build awareness for the GreenTable Network – a Vancouver-based certification program for the culinary sector that is in its early days of development and is spreading across the province and into Alberta. There are two membership categories – one for food service operators and professionals, and the other for suppliers and growers. The Network's mission is to foster sustainability through collaborative action and innovative solutions.
- Highlight good practices within the community and the region to the resident and visitor alike. Use Tourism Cowichan's e-newsletter to profile new practices.

⁹ Handbook produced by Marr Consulting Services for the Tourism Industry Association of Canada, Parks Canada and the Canadian Tourism Commission – October 2008. Available on various websites, including Tourism Vancouver Island – http://www.tourismvi.ca/pdf/best-practices/green_your_business_en.pdf

¹⁰ For further detail see: <http://www.tca.gov.bc.ca/industryprograms/BuildingAndGrowingYourBusiness/TourismBusinessEssentials/BusinessEssentialsPublications.htm>

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4. Infrastructure and Support Services

The Cowichan region has strong natural and cultural assets for the development of tourism. However, while there are examples of competitive product, the planning process did draw attention to a range of issues associated with what currently exists and highlighted many areas where the visitor experience could be enhanced through infrastructural developments and increased availability of support services. It is anticipated that the impetus for moving forward with a number of existing projects and the opportunity to identify new initiatives will be enhanced through an ongoing process that focuses on bringing partners together at a regional level.

4.1 Visitor Services and Visitor Centres

Implement regionalization of visitor services strategy

This proposal has been at the recommended proposal stage for some time. The overriding goals to this initiative include:

- Creating consistency in the messaging and raising the profile of the region as the destination, with communities acting as a hub for a regional experience.
- Increasing the ease with which the visitor can enjoy a regional experience and spreading the benefits of tourism throughout a wider area.
- Reducing promotion costs for tourism operators.

TACTICS:

- Moving forward will require developing a Memorandum of Understanding between Economic Development Cowichan acting on behalf of Tourism Cowichan and the five Chambers. Developing a comprehensive Memorandum that addresses the following should assist in allaying any concerns that may lie behind the stalling of this initiative to date:
 - The development of package membership fees to enable tourism businesses to rack in all Visitor Centres for a single fee. This should be done in conjunction with Tourism Cowichan, with the racking fee including a presence on the Tourism Cowichan website.
 - The introduction of joint training initiatives for Visitor Centre staff that includes a region-wide familiarization program to ensure that staff are knowledgeable of product throughout the region. This may be expanded to include opportunities for rotation of staff and volunteers.
 - Maintenance of a local product database and regular submissions of updates to Tourism Cowichan.
 - The development of uniform business systems in relation to the day-to-day administration of the Visitor Centres.
 - Consideration of a joint application to Canada Summer Jobs program through Services Canada for seasonal positions.
 - An exploration into the use of Visitor Centres as a point for collecting visitor data that is in addition to what is routinely collected for MTCA.
 - Increased profiling of Tourism Cowichan branding in local visitor publications that are racked in Visitor Centres.
 - In the longer term, efforts should be made to work towards promoting Tourism Cowichan's

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website as the key source of web-based visitor information for all communities. This will create greater consistency in messaging and will reinforce the positioning of the region as the destination, while also reducing efforts and costs in web maintenance. Further discussion is needed on the role of the regional website versus local community websites to minimize confusion for the visitor and to create synergies.

- The concept of a Cowichan Region Chamber of Commerce has been discussed. This should be explored further, but it is not a prerequisite for regionalizing the delivery of visitor services through the various Visitor Centres.

Continue to move forward with the Duncan/North Cowichan Visitor Centre Project and determine optimum locations for other Visitor Centres.

In addition to regionalizing the delivery of visitor services through the Visitor Centres, there are Visitor Centre infrastructural projects and related matters in various stages of progress or discussion¹¹. The Visitor Centres are a shop-window for the region and it is vital to focus on the message, image and services that they present in their totality.

TACTICS:

- Work is proceeding on the construction of the new Duncan-Cowichan Visitor Centre near the BC Forest Discovery Centre. It is anticipated that this facility will become the flagship Visitor Centre for the region. As such there should be a strong branding association between the Centre and the Cowichan branding. Administration services associated with this Centre would be in the strongest position to coordinate the delivery of a regionalized visitor services program as outlined above.
- Assuming that services are regionalized, regional support should be added to the efforts being made by the Ladysmith Tourism Committee and the Ladysmith Chamber of Commerce to secure funding for the renovation of the train station as a new location for the community's Visitor Centre.
- The planning discussions raised the need for a new point of delivery for visitor information for visitors as they enter the Region from the south. The current visitor booth is constrained by both visibility/location and size. A potential location on the Highway has been identified and consideration initially should be given to using the location for a roadside information exhibit.
- Commit to exploring funding options for the ongoing viability of providing the existing visitor information services across the region, including those at Cowichan Lake.

Explore opportunities to develop a centralized reservation service.

Interest in a central reservations service was expressed in the planning discussions. This would be regarded as an extension of the Visitor Centre services and would likely be implemented through the new Duncan-Cowichan Visitor Centre when it is completed. Caution is needed in considering this service as it may not generate sufficient net revenue to justify developing the service.

TACTICS:

¹¹ There is no presumption of increased funding from MTCA for Visitor Centres based on current or future changes to the Visitor Centres that are part of the BC Visitor Centres Network.

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- Review options for developing this type of service. If the service is based on referrals and bookings for spontaneous business without a cash transaction, there would be few issues. However, if the service was expanded to include advance reservations for packaged products with cash transactions taking place, the organization responsible for the centralized reservation service would have to comply with the Regulations under the Business Practices and Consumer Protection Act for travel wholesalers. For further information refer to Consumer Protection BC.
- The success of a central reservations service or the booking of 'spontaneous' business is dependent on working closely with tourism businesses. The former will require building and promoting new and innovative packages and promoting with the call-to-action and the reservation process going through the new central reservations service. There are obvious staffing implications with developing this program. Kimberley Vacations offers this type of service, but it has the added advantage of managing 1st Tee Golf for Kootenay Rockies which increases the economic viability of the service.

4.2 Signage

Promote support for Economic Development Cowichan's regional signage initiative and continue to pursue the implementation of local signage and way-finding projects.

Signage issues are a recurring theme and the region has already undertaken an extensive evaluation of signage. The Boulevard Report (2007) has highlighted a series of recommendations that have been agreed to in principle but have yet to move forward to implementation. The Report recommended the implementation of a regional signage plan through the Cowichan Valley Regional District. Under this approach the Regional District would coordinate all requests for tourism signage in the region by being the primary contact in the application process. Currently there is a confusing process that relies on business operators contacting the Ministry of Transportation and Infrastructure directly. Under a regionalized initiative it was proposed that the CVRD would take control of this application process and coordinate all requests for signage and subsequent requirements, thereby creating a more streamlined process in theory. Furthermore, the Report recommended adding the Cowichan logo to the signage to strengthen the concept of the regional destination. Insufficient funding and general difficulties in resolving Highway signage problems with the Ministry of Transportation and Infrastructure have been regarded as the key constraints to moving forward.

Similarly, way-finding is an area that needs to be assessed if the region is to promote hiking and off-road biking, and if visitors are to navigate successfully around communities.

TACTICS:

- The Boulevard Report identified the need to establish a roads and highways signage committee to represent the municipalities, the electoral areas and First Nations. The *Community Tourism Foundations* planning workshops highlighted the need to move forward with setting up this committee as the first step in dealing with the ongoing signage concerns.
- Specific highway signage issues were raised in relation to Ladysmith, Crofton, and Chemainus, and the need for regional 'gateway' entrance signs was again identified. Assuming that a new signage committee is established, these issues should be looked at as pilot projects.
- Evaluate way-finding within the region. As cycling and trail initiatives are developed and their related experiences marketed, this becomes an increasingly important element of the infrastructure that needs to be assessed. Good way-finding enhances the visitor experience, heightens a sense of safety and can assist in extending the length of stay.

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- Commence by undertaking a detailed sign audit of a given area. Consider working with the Vancouver Island University or a local senior secondary school to gain assistance in undertaking this stage of the work. For further guidelines, refer to a new manual, *Conducting a Sign Audit* (October 2009), developed through the REDTREE Project (Thompson Rivers University). This manual provides guidelines which will assist a community with undertaking a sign audit. The use of an audit tool helps with evaluating overall signage, and identifying current strengths and weaknesses. The focus of attention for these guidelines is on audits for rubber tire traffic, but the procedures are transferable to all settings. The document is available at: <http://redtree.tru.ca/Resources/howtosignageaudit.pdf>.
- Develop a way-finding plan. Funding for implementation can be difficult to obtain, but having a plan will strengthen a funding application and will facilitate moving forward once resources are available.

4.3 Inter-Regional and Intra-Regional Access

Work with a range of partners and regional stakeholders to improve access to and within the region.

There are a number of access issues that are either in the stage of ongoing discussions or need to be elevated as matters of significant concern. These include:

- Rail access that has the capacity to better service the needs of short-stay visitors and to generate new visitor demand;
- Developing a regional BC Transit schedule that includes connections to Ladysmith;
- Developing a transportation service that can connect visitors arriving by recreational boats to key centres within the region;
- Air access to Nanaimo – issues relating to competitive scheduling and pricing, and connectivity with communities; and,
- Developing connectivity between Lake Cowichan and the northern terminus of the West Coast Trail and/or Port Alberni.

TACTICS:

- There is a Transportation Task Force that is currently looking at the effectiveness, efficiencies and problems relating to transportation on Vancouver Island north of Duncan. The Task Force is seeking to initiate the development of an Integrated Strategic Transportation Plan for this geographic area and is continuing to look at efficient transportation options.
 - Where relevant, work through this initiative to look at particular issues. Ensure that stakeholders are kept informed of progress and ongoing discussions.
- Continue to support the work of the Island Corridor Foundation in its efforts to establish a commuter rail service. In the short term work with tourism operators and accommodation properties to develop overnight packages with rail as the mode of travel. The package would have to provide for intra-regional transportation to be competitive.
 - Should there be significant scheduling changes to the Via Rail schedule, BC Transit has indicated that it would look to alter its timetable.
- Continue to support BC Transit in the development of a local paratransit system for Ladysmith as outlined in the *Transit Business Plan for the Cowichan Valley*. A key element of this support is promoting intra-regional themed routes and developing collateral that would encourage the use of

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transit as an optional mode of travel. Partnership discounting for attractions and retail could also be used as incentives to promote the use of public transport, and could be developed as an integral part of the region's commitment to sustainability and low carbon footprint.

- Providing a transport service that links with the marinas will require a partnership-based approach to developing a service. Review opportunities for sponsorship, and explore the option of developing a pilot project to determine the sustainability of such an initiative. This will require tracking associated visitor spend and length of stay, on the assumption that a transportation service facilitates an extended visitor experience (by time and distance). The nature of visitor spend will assist in identifying appropriate sponsor partners.
 - Continue to review and analyse models from elsewhere. Identify 'success factors'.
- Matters relating to connectivity with the north end of the West Coast Trail and Port Alberni are components of wider issues relating to the use of lands that have complex First Nations and logging company ownership rights associated with the use of the lands. This area should be the subject of wider recreation land-use planning discussions – see Section 5.2.

4.4 Tourism Business Growth Services

Identify new tourism business and investment opportunities and provide support services to strengthen existing tourism businesses.

Economic Development Cowichan staff are already actively involved in this role. As efforts continue to collectively review and analyze the tourism industry and its individual niche sectors from a regional perspective, gaps in infrastructure and tourism business opportunities will become more apparent. The need for a boutique hotel as an alternative accommodation venue for golf packaging was highlighted in the planning discussions, together with issues related to developing farm accommodation. Similarly, the area no longer offers accommodation inclusive of spa and wellness facilities, which is a distinct gap given the focus on healthy foods and lifestyles throughout the region. The services required will vary from developing appropriate investment strategies to working with partners such as the Chambers of Commerce and Community Futures to strengthen and expand existing businesses.

TACTICS:

- Ensure that there is an up-to-date profile of the regional tourism industry to assist prospective entrepreneurs in the analysis of the opportunity. Data on the value of tourism to the regional economy would be a significant asset in building this service.
 - Consider identifying specific investment opportunities on the EDC website. Review the Government of Alberta's website as an example of this approach:
<http://tpr.alberta.ca/tourism/investment/regionalopportunities/default.aspx>
 - Include services that guide clients through the regulatory processes involved in tourism development projects.
- Work with the Chambers of Commerce and the Community Future to develop the key elements of a business support program. It should seek to connect small business owners to existing training and business development resources within the region (including financing services), provide training where there is sufficient demand, and open up avenues for networking. While key elements of these services already exist, there is a need to profile them more actively within the tourism industry – particularly in relation to ongoing mentorship services.
 - Highlight provincial resources including Small Business BC and Front Counter BC, and

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federal resources such as Canada Business Services.

- Where appropriate, play an advocacy role in assisting small business with regulatory issues.
- Meet with local lending institutions and discuss the significance of tourism as a key component of the regional economy.

4.5 Strengthening 'Sense of Place'

Provide ongoing support for revitalization and beautification projects that will enhance the appeal of individual communities.

While revitalization and beautification projects are generally local priorities, their importance in strengthening the appeal of the overall destination is significant. Communities with a strong sense of place will act as 'honey-pots' in the destination and will provide a stronger base for tourism businesses to build on. Spreading the benefits and generating visitor spend throughout the region is highly dependent on being able to market local distinctiveness and authenticity.

TACTICS:

- Create awareness of the value of tourism and the benefits of street appeal and local distinctiveness with local politicians.
- Promote applicable funding opportunities as and when they arise.
- Encourage local tourism operators to participate in all relevant community planning processes.

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5. Product Development

The Cowichan Region offers a wide range of tourism products and is an area with significant natural and cultural attributes that together have potential to exert strong appeal. This planning process provided an opportunity to look at these attributes, and to assess overall strengths and areas of concern in relation to actual and potential tourism product. These are summarized in the Current Situation Overview in Appendix 2.

To date the general focus has been on the community perspective and efforts to plan for the strategic development of niche sectors across the region have been relatively limited. The discussions identified the value of looking at sectors in a more critical manner and determining new growth tactics. The workshops and working groups focused primarily on the marine sector, nature-based and fresh-water based tourism, arts and culture including Aboriginal cultural tourism, agritourism and viticulture, sport tourism and golf¹². This section looks at each of the key sectors in terms of product development opportunities. Building effective partnerships and working on regional initiatives is a common theme in the following strategies and tactics.

5.1 Marine Tourism

Recognize marine tourism as a key product sector of the Cowichan Region and encourage a stronger partnership based approach to its development.

The region has unique marine assets and attributes that have international recognition. The protected and safe waterways, scenic anchorages, and the area's association with the Gulf Islands archipelago and proximity to the Gulf Islands National Park Reserve have the capacity to attract high-value international visitors. The Cowichan eastern coastline provides a range of marine-based facilities, such as Maple Bay Marina with its array of support services and onshore food and beverage venues. While these marinas should be regarded as alternative gateways to the region, the reality is that there is a generally a 'disconnect' between these facilities and the remainder of the region.

Clearly, given the region's invaluable natural assets, marine tourism has strong potential for growth and capacity to generate further visitor spend within the region. However, the sector is currently constrained by significant fragmentation, infrastructural issues, and low community awareness and appreciation for its role as an economic driver. The planning discussions highlighted a need to look at this high-value sector in a more strategic manner, and to identify areas of action that have the potential to capitalize more fully on existing strengths.

TACTICS:

- The strengths and constraints associated with this sector are well understood by those directly involved in it. There is a need to assess the status of the industry and prioritise infrastructural and land-use requirements that are needed to increase the value of this sector in a sustainable manner. Any discussions of this nature should include representatives from the different municipalities and CVRD to further increase awareness of the sector's growth potential.
 - A preliminary assessment was made in the *Commercial Marine Based Tourism Study Report* completed in 2005 (see Appendix 2). It would appear that many of the issues identified in this report remain valid. This work should be reviewed as a starting point to further discussions.

¹² A working group also looked at accommodation. The feedback from this group is interspersed throughout this Plan.

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- Supplement this existing work with a further review of current facilities and develop a comprehensive electronic inventory of marine-based product.
- A detailed on-line inventory was developed for the former Cowichan/Ladysmith Marine Tourism Authority. This material should be retrieved, up-dated and made available again as an on-line planning tool for marine-based visitors.
- The Ladysmith Maritime Society is moving forward with the Ladysmith Community Marina Visitor Facilities Project which will include construction of a visitor reception centre with washrooms, showers, laundry facilities, meeting and resource rooms, and Wi-Fi capabilities; construction of a visitor special events dock; installation of a sewage pump-out station; and, construction of a new approach, ramp and main dock. It is anticipated that these facilities will attract a significant increase in recreational boaters to Ladysmith and will extend the marina's current peak season. New proposed activity packages that include kayaking and a First Nations cultural experience (in partnership with the Stz'uminus First Nation) will further enhance the attractiveness of Ladysmith as a marina stop-over. A growth in visitor nights is anticipated and these should be carefully tracked to demonstrate return on investment.
- There is a need to assess on-shore visitor opportunities that are readily available to marine visitors in moorage areas along the entire coastline. The transportation issue has already been identified (Section 4.3) and needs to be resolved, at least in the peak summer months, if the wider community is to fully benefit from this visitor segment. Similarly, the recreational opportunities that are immediately adjacent to docking areas should be a focus of attention if the region is to be successful in 'holding' these visitors for any length of time. Concerns regarding shore access to back country, the availability of near-shore campsites, and the limited transient moorage at areas of existing interest are all issues that would benefit from further assessment and identification of priorities.
 - Develop new collateral material that presents existing opportunities for recreational boaters. Creating this in a form of a map that highlights moorage areas, shore activities, marine services, and local amenities should be considered.
- Review land to water access for all marine-based users and determine appropriate strategies to address significant constraints.
- Review the work of the Georgia Strait Alliance and work towards eco-rating certification under the BC Clean Marine Program. Maple Bay Marina is in the process of pursuing this certification. Other marinas should seek to be compliant, thereby enabling the region as a whole to position itself as a "Clean Marine" destination.
- Undertake market research that focuses on this sector. Length of stay, seasonality, visitor expenditures and on-shore activities are all areas of interest that would assist the sector in its ongoing development. Explore opportunities to work with the MTCA, TVI and/or Vancouver Island University on a research initiative.
- The region has unique strengths in relation to winter diving. Further consideration needs to be given to promoting this activity – particularly in light of its ability to attract visitors out of peak season.
- The marine sector can be strengthened through innovative packaging with other product sectors, culinary experiences, events and on-shore accommodation, provided that transportation is included.
 - Cross-marketing with other product sectors and within the sector will raise the profile of the marine-based tourism sector. Maple Bay Marina and Genoa Bay Marina partner on a discount moorage coupon program. The effectiveness of this program in extending length of stay should be assessed.

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5.2 Nature-Based Tourism

Develop a nature-based tourism strategy and action plan for the Cowichan Region.

The Cowichan Region has potential for a spectrum of nature-based activities from eco-tourism and soft adventure to more extreme pursuits and hard adventure. Activities such as camping, hiking, kayaking, boating, fishing and more recently mountain biking, are associated with the region (see Appendix 2), but there is substantial scope to strengthen this association and to develop product and related infrastructure that will expand on available opportunities. This area of product development will need considerable public sector involvement as there are infrastructural, access and land-use issues that should be addressed.

TACTICS:

- The planning discussions identified numerous opportunities for specific activities, including niche pursuits such as paragliding on Mount Prevost and mountain biking on Tzouhalem, but many of these activities could not be regarded as fully 'market ready'. While there are a number of well-established outfitters and operators providing sought-after experiences, there remains potential to further develop nature-based niche sectors in a way that will meet the resurgence in demand for this type of product. It is therefore recommended that a public sector partnership is established with the Regional District as the lead, to develop a nature-based tourism strategy. The strategy should include an analysis of the commercial and recreational opportunities within the Cowichan Region and an action plan for further developing and utilizing these opportunities to expand tourism and increase the appeal of the area for local residents.
 - The methodology should include an identification of existing opportunities and current levels of activity as an initial step in assessing the potential for expansion; an analysis of required facilities and support infrastructure (including signage and trails development and maintenance); and associated land-use issues.
 - The discussions with the Cowichan Lake stakeholders identified wide-ranging back-country opportunities in the area. At the same time major constraints associated with land ownership were identified. Clearly, there is a need for a facilitated series of discussions with the forestry companies and the First Nations to explore collaborative options. Expanding on wilderness and lake-based opportunities in this area would increase the overall market profile of the Cowichan Region substantially, particularly if a stronger association could be built between the destination and its potential to act as a gateway to West Coast wilderness experiences associated with the iconic West Coast Trail/Pacific Rim National Park Reserve.
 - The first half of the new Runner's Trail from Headquarters Bay at the southern end of the Canadian Northern Pacific Railway Alberni Inlet Trail to Francis Lake (about halfway to Cowichan Lake) is in near completion. This is a collaborative initiative involving the City of Port Alberni, Tseshaht First Nation and funding from the Island Coastal Economic Trust. There are discussions regarding establishing a funding partnership to complete the trail through to Cowichan Lake. A trail of this nature would be a primary asset to the region and discussions should take place to assist in securing funding for the remaining half.
 - The paved road to Port Renfrew presents 'gateway' opportunities for Lake Cowichan. While the area has strong potential for growth in a range of nature-based activities, including mountain biking and ATV use, there are constraints that need to be looked at in relation to ownership (as already cited), accommodation and lake access. The 76 km circle route around Cowichan Lake is of interest to visitors, but is inaccessible to those in rental vehicles without off-road insurance.

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- Similarly, the Port Renfrew road creates potential to develop circle route packages for rubber tire traffic and cyclists. The full circle route is already packaged through Cycle Treks from Victoria as a five day full circle cycle tour of southern Vancouver Island via Lake Cowichan. The route is packaged with accommodation, guides, van escort, and various agritourism/viticulture and activity-based experiences such as white water kayaking.
- There is considerable scope for building specific cycling product – back road, off-road cycling and mountain biking. The Trans Canada Trail and the imminent completion of the Kinsol Trestle open up new opportunities for product development and associated packaging. There is scope to partner with neighbouring jurisdictions, particularly Capital Regional District and Salt Spring Island to develop circle cycling routes that would link in with the Island, the Lochside Regional Trail and the Galloping Goose. Effective development of this product will require identifying appropriate accommodation venues and associated support services.
 - Review potential of all community trails and regional authorized back-country trails for different types of off-road cycling experiences. Refer to Whistler Trail Standards¹³ for definition of trail types.
 - Ensure that there is a communication link between the MTCA *Experiences BC* Mountain Bike Tourism initiative and Tourism Cowichan. This sector group has just completed a plan that is designed to raise the profile of mountain biking as a key provincial experience and British Columbia as an international destination for the activity. For other resources, refer to the handbook developed by Tourism BC – *Developing Community Mountain Bike Tourism Experiences* (2008) and the work of the Western Canada Mountain Bike Tourism Association¹⁴.
- Any development of trail-based product will require supportive print and web-based collateral. The CVRD GIS department will work on mapping initiatives with Tourism Cowichan.
- The trails open up options to develop and promote new activities such as Geocaching. This is a low-impact growth product that will assist in extending the length of stay. Review the activities of Shuswap GeoQuest as an example of using Geocaching to build shoulder season business and generate new interest in a destination – <http://shuswapgeoquest.com/index.html>.
- Similarly, the region offers significant potential for birding tourism, particularly in relation to the migrating and wintering birds associated with the estuarine areas.
- The Cowichan River has heritage designation at both national and provincial levels. It offers a range of unique opportunities associated with fishing, hiking and 'drifting' and potential for interpretive experiences that would enhance the region's ecotourism product.

¹³ http://www.ownthetrail.com/TrailStandards_Whistler.pdf

¹⁴ See <http://www.mbta.ca/mbta.asp>

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5.3 Arts and Cultural Heritage

Work with partners to strengthen the role of arts and cultural heritage within the tourism industry.

The Cowichan Region has a rich cultural heritage and a strong tradition of arts. The attractions and experiences on offer embrace an array of product associated with First Nations culture, visual and performing arts, and a diverse range of artisans. The international recognition of the Chemainus murals, Duncan's positioning as the City of Totems together with the Quw'utsun' Cultural Centre, and the opportunities for live performances are indicative of the strengths that the region has in arts and cultural heritage. The specific attractions that highlight the regional ecological diversity, such as the Pacific Northwest Raptors Bird of Prey and Falconry Visitor Centre, the BC Forest Discovery Centre and the Freshwater Eco-Centre; the opportunities for boutique shopping; and, the range of festivals and events that celebrate the region's distinctiveness add further value to the visitor experience. However, despite the extensive product base, the planning discussions raised concerns regarding the general fragmentation of this sector, the lack of coordinated marketing, insufficient packaging, a weak presence on the internet, signage and hours of opening issues. The Regional District has just created an arts and culture staff position and it is anticipated that this position will play a key role in integrating arts and cultural heritage with tourism in a more effective manner.

Building local and regional awareness is critical in developing cultural tourism and in strengthening the arts and cultural heritage sector. There is often a tendency to assume a high level of awareness locally which generally results in a lower priority being placed on quantifying assets and capacity or the overall economic value of the sector. Addressing these gaps is an important step in leveraging local and regional political support and in attracting funding from outside the region. The following tactics reflect the need for a comprehensive analysis of the existing sector.

TACTICS:

- Undertake a comprehensive scan of arts and culture in Cowichan and an analysis of its economic value. This is a significant project but it will establish essential baseline data, and it will provide an inventory of product and an overview of facilities, capacity, specific needs, and a better understanding of actual and potential markets. The research should include a review of sales outlets, promotional tools, professional development, access to studio space, involvement in related education, and associated issues and challenges. In looking at the economic impact, attention should focus on measuring spending and related employment associated with the entire arts and culture sector, including arts-related education, relevant events and festivals, societies and organizations.
 - To undertake this work in a comprehensive manner, it is recommended that a number of research tools are used including questionnaires, focus groups and interviews. Ideally there should be consultation with residents and the wider business community, as well as artists and cultural organizations. Achieving high levels of participation is important and will require a public relations strategy involving the local media that highlights the benefits of this work. This is a significant project and the availability of funding for professional assistance would be of value. In the absence of funding, review work completed in other jurisdictions and tools developed by organizations such as 2010 Legacies Now.
 - The research findings should assist in attracting outside funding and investment. With ongoing tracking the data will also demonstrate return on investment and can be used to monitor the impact of new policies and initiatives.

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- Encourage further development of authentic experiences based on traditional First Nations culture. The Cowichan Tribes play a strong role in tourism and raised the profile of the region considerably through the North American Indigenous Games in 2008. Related product includes the Quw'utsun' Cultural Centre and Aboriginal cultural events, such as the Walk-of-Nations and the Cowichan International Aboriginal Festival of Film & Art. The interest in Aboriginal cultural experiences has increased substantially in recent years, particularly with the hosting of the 2010 Winter Olympic and Paralympic Games, and the Aboriginal Tourism Association of BC (ATBC) is seeking to build on this new level of market interest through further product development and marketing.
 - Encourage close working relations with ATBC and review opportunities to build on current product offerings.
 - Explore opportunities to create 'experiences' that can be packaged with other products. The discussions with the Stz'uminus First Nation in Ladysmith regarding developing a cultural experience that can be packaged for marine-based visitors exemplifies this approach (see Section 5.1).
- Identify existing heritage product such as the Ladysmith Heritage Route and the Cowichan Valley Museum, and review the potential to develop a regional heritage-based product that incorporates these local elements. The region has numerous 'stories' and interesting sites such as Whippletree Junction associated with its more recent settlement that could be incorporated into an historical interpretive trail.
- Chemainus has taken a lead on developing a packaged product that includes theatre and accommodation. Further consideration needs to be given to expanding this approach and to working with existing consortiums such as the Visions Art Tour Society. Packaging needs to be creative – existing packaging approaches should be reassessed to see where there is room for innovation that would bring a 'freshness' to the experience.
 - Consider the potential for developing new regional circle tours that offer a range of local authentic experiences based on local products (see Section 5.4 below).
 - Cowichan hosts a number of Christmas events and festivals that seek to promote local arts and crafts. Explore the potential for packaging these events with accommodation and promote in the near-in regional market.
 - Work with artists and artisans to explore the potential for developing new 'experiential' product based on interactive workshops. Examples of success elsewhere are often based on a packaged product that includes spa and wellness components, nature-based activities and/or unique culinary experiences.
- Establish a working group to review existing events and festivals and to identify ways of consolidating this sector. Events and festivals can be a key economic driver, particularly when there is a clear strategic approach to building the product.
 - There are opportunities to create greater efficiencies in planning and marketing. Although many of the current events are community-based, consideration should be given to developing a regional marketing template that raises the awareness of the region at each event and strengthens the association of the community with the region. A consistent regional emphasis in the marketing message will build a profile of a dynamic regional destination and will assist in cross-marketing events.
 - Focus on packaging key events with accommodation and promote regionally.
 - Create a process for evaluating the events and use this process to determine tactics for enhancing each event and generating new benefits. Various tools have been developed to assist with this process and consideration of an appropriate methodology should be built into

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the festival and events planning process¹⁵.

- Hold an annual networking workshop for all event planners and organizers. Review strengths and weaknesses and develop tactics for future events.
- Encourage the municipalities and CVRD to expand or develop public art programs. The totem poles in Duncan and the murals in Chemainus are both central to the identity of the two communities. Other opportunities to expand on the provision of artistic expression should be explored as public art can play a strong role in contributing to a 'sense of place' and in enhancing an association with arts and culture.
 - There are a range of funding models for public art that could be considered. Examples include:
 - < Capital Regional District – Four municipalities within CRD (District of Saanich, City of Victoria, District of Oak Bay, and the Township of Esquimalt) have "percent for art" policies in place. In Saanich the municipality has committed 1% of the value of the capital budgets for above ground projects towards the purchase or commission and maintenance of public art to be integrated into or displayed in public areas; and 1% of the budget for municipal building construction/renovation projects, or park redevelopment, in excess of \$250,000 to the purchase or commission of public art for that building, structure or park.
 - < City of Surrey – through the Public Art Policy's Funding Strategy, selected civic capital projects are required to provide 1.25% of the construction budget for the inclusion of public art. The percentage of art funds arising from smaller park development construction projects are pooled and included for allocation within the annual Public Art Master Plan.
 - < City of Kelowna – contributes a sum equal to 1% of the City's annual capital budget from general taxation revenue (a minimum of \$100,000 per annum) to create a Public Art Reserve Fund to be used to fund civic public art projects, and to provide matching funds to encourage the provision of public art by the private sector within publicly accessible portions of developments.
 - < City of Revelstoke – \$1 per capita is annually allocated to a Community Public Arts Program.

5.4 Agritourism, Culinary Tourism and Viticulture

Strengthen the capacity of this sector to be a major component in defining the 'essence' of Cowichan and adding value to other sector experiences.

The combination of a Maritime Mediterranean climate and fertile soils has resulted in a rich abundance of agri-product. Cowichan's positioning as a destination has increasingly come to be associated with its wide variety of experiences in this sector, and many of the region's festivals and events celebrate the food and beverage produce associated with the land and the ocean. There is a strong level of appreciation for organic and healthy eating within Cowichan, and the region has received further acclaim through Cowichan Bay becoming the first named *Cittaslow* community in North America.

¹⁵ Examples include Research Resolutions & Consulting Ltd., August 2005, Guidelines for Measuring Tourism Economic Impact at Gated Events and Festivals, and Guidelines: Survey Procedures for Tourism Economic Impact Assessments of Ungated or Open Access Events and Festivals – both these documents were financed by the CTC and the province/territory DMOs. This material can be accessed at: <http://www.tca.gov.bc.ca/research/ResourcesForResearchers/HowToGuides.htm>

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These strengths are significant and there needs to be a concerted effort to build on them and to identify and address any areas of concern in a more strategic manner.

The concept of promoting Cowichan as a 'Feast' was raised in the planning discussions. This theme not only embraces the local flavours associated with diverse wine and culinary products, but it can also be expanded to include the array of other products already discussed – nature, the ocean, arts, culture, and retail. As local writers have highlighted, there is a *joie de vivre* associated with a 'land of plenty' that provides considerable potential for innovative packaging and marketing to regional and international visitors alike.

TACTICS:

- Establish a working group of stakeholders from within the sector to assist in further defining strengths, areas of weakness and possible tactics. The discussions associated with this regional planning process identified a range of issues, but there remains scope for additional input from operators that are directly involved in related businesses. This working group should develop a summary report for Tourism Cowichan and should be disbanded upon completion of the project. The following activities will need to be addressed:
 - Ensure that Tourism Cowichan has a complete inventory of all related product, including hours of opening, types of facilities and services offered, group capacity, awards and recognition, and nature of access and accessibility (including signage issues).
 - Identify opportunities for and interest in packaging and cross-marketing.
 - Identify weaknesses in current collateral related to this sector.
- Explore the opportunity to develop a regional self-guided agritourism product or an event-styled theme tour. There are a growing number of circle tours and agritourism consortiums within BC that are becoming significant attractors, including the Fraser Valley Circle Farm Tour that consists of a series of farm tourism tours in a number of adjacent regions and communities – (Abbotsford, Agassiz-Harrison Mills, Chilliwack, Langley, Mission, and Maple Ridge-Pitt Meadows). These tours demonstrate the value of developing partnerships and creating product that features a range of agritourism businesses, together with local and regional agrarian themed festivals and events and farm-based or rural accommodation.
 - Explore opportunities to work with the wider region in developing themed routes, including the Gulf Islands.
 - There are already a number of festivals and events associated with this sector. The potential to build on these events through amalgamation, expansion or further diversification should be discussed.
 - Utilize the concept of 'feast' in developing a trail that embraces all forms of produce and product from the region.
 - Review examples elsewhere, such as the **Taste Trail** in Prince Edward County. This self-guided tour route links together Prince Edward County's finest artisanal food producers, restaurants, wineries (as well as a cidery and a brewery) – all dedicated to crafting products from local ingredients. The tour showcases 23 participating locations and offers visitors the opportunity to wander from place to place alternating between tastings, tours and dining experiences. All participants provide an added-value experience, such as a tea-room, a tasting area and/or on-site entertainment. Referred to as *an authentic epicurean experience*. An interactive web-map, a print brochure and signage all promote this example of *terroir-based gastronomy*. <http://www.tastetrail.ca/tourroute.html>.

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- There is a growing interest in using Farmers' Markets to promote awareness in local experiences and product. Cooking demonstrations in the Market or the current linkages that Fairburn Farm Culinary Retreat and Guesthouse has with the Duncan Farmers' Market are examples of tactics that can be developed further.
- South Cowichan has a strong equestrian sector that has not been looked at as a potential tourism product. Equestrian tourism includes a wide range of participatory and spectator activities and would be a natural fit with the pastoral landscapes and the back country access. An inventory of operators should be developed and a workshop hosted to review capacity and level of interest.
 - Potential exists to develop bale and breakfast accommodation.
- Issues were highlighted in the planning discussions regarding CVRD bylaws and farm-based accommodation. Business advisory services should be offered to assist in developing farm-based accommodation. There may be a need for advocacy (where appropriate).
- Facilitate sector net-working events.
- Work through the EDC to expand on high-end boutique style accommodation that aligns itself to product in this sector. The closure of the Aerie has left a gap in the 'opportunity spectrum'.
- Direct Farm Marketing is targeting local residents. Work with stakeholders to develop collateral that will also target the visitor market.
- Regional stakeholders are currently involved in provincial initiatives such as the Culinary Tourism Society, the BC Agritourism Society and the BC Food and Beverage Tourism Alliance. Ongoing involvement and participation in relevant programs, such as quality assurance/accreditation, insurance, and in related marketing initiatives should be encouraged. The MTCA *Experiences BC* sector group (the BC Food and Beverage Tourism Alliance) offers new opportunities for leveraged partnership marketing.

5.5 Sport Tourism and Golf

Develop a coordinated approach to pursuing sport tourism.

The Region has significant assets for a wide range of sport tourism events and has already had success in hosting the high profile North American Indigenous Games in 2008 and the BC Seniors Games in 2005. The facility base has grown substantially in recent years with key venues in the Duncan/North Cowichan area, including the Cowichan Sportsplex and the Aquatics Centre. There is ongoing expansion with infrastructural developments such as the all-weather sports field to be completed in 2011 in Ladysmith, and the current renovation and extension of Cowichan Lake Sports Arena. The golf sector offers a variety of experiences to a range of golfers, and has distinct advantages with the region's long season and good access.

With regard to constraining issues, accommodation was highlighted as an area that needs to be addressed for both sport tourism and golf tourism. The golf industry could benefit from a high-end boutique facility that would offer a more intimate packaged experience, while sporting events that focus on attracting teams have issues with coordinating appropriate accommodation requirements.

Efforts are already underway to address issues and leverage opportunities. Economic Development Cowichan is actively promoting a range of hotel and resort investment opportunities and Tourism Cowichan has been working with provincial partners to highlight the Region's potential to host sport tourism events. The following tactics seek to reinforce these efforts.

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TACTICS:

- An Expression of Interest was submitted to Tourism BC to participate in the Advanced Sport Tourism Planning Workshop. The region is anticipating the opportunity to participate in this program in 2010-11. Many of the following tactics are likely to be highlighted in this planning process.
- Ensure that there is a comprehensive database of all sport related facilities and venues, sport tourism organizations, and sport/tournament organizer clients.
 - Cowichan has been profiled on www.HostingBC.com by Tourism Cowichan. The content on this website needs to be maintained on an ongoing basis.
- Develop communications tools and procedures to facilitate the preparation of bids and the hosting of events.
 - Ensure that Tourism Cowichan is kept aware of all bid applications and is given an opportunity to support the bid where appropriate.
 - Develop a 'manual' for sport events to guide staff involved in assisting client groups. Establish systems that will facilitate the booking of accommodation and guarantee the availability of suitable food and beverage services.
 - Focus on shoulder season and winter season opportunities as the accommodation base may be insufficient in peak season.
- Build hosting strategies to gain leverage from sport events.
 - Create a hosting package that includes destination promotional material and opportunities to extend the visit. Include opportunities for other members of the family or group that may be accompanying the athletes.
 - Create welcome packages for overnight participants and spectators. Partner with the accommodation sector to distribute these. Include incentives that would generate return leisure travel and/or extended length of stay.
- Local appreciation for the value of sport tourism is low. Develop an awareness program to create an understanding of this sector and its potential impact on local businesses.
- Explore opportunities to promote the region as a location for sport training camps. Lake Cowichan has been successful in this area and there is scope to expand this type of product.
- Build on existing high profile events such as the Subaru Shawnigan Lake International Triathlon.
- Ensure that Cowichan is represented at the annual BC Sport Tourism Events Marketplace. This is a province-wide business-to-business conference for community tourism industry representatives and provincial sport organizations from across the province.
- Ensure that Cowichan is involved in the BC Sport Tourism Network. This network facilitates interaction and the sharing of knowledge between members of the BC sport tourism community, and includes quarterly conference calls, a bimonthly e-newsletter informing network members of upcoming event bid deadlines, grants and industry news, as well as updates on Provincial programs.
- Develop methodologies for assessing the delivery and the economic impact of major sporting events.
- Continue to work with the golf sector to determine appropriate support tactics. There is potential to utilize golf more effectively as an 'added value' product for the business market.
 - The Golf Vancouver Island consortium is a well organized golf alliance that has raised the

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profile of golf on Vancouver Island substantially. Support this consortium in partnership marketing to build awareness of the wider region.

- Explore the opportunity to develop a regional alliance that can promote incentives to attract visitors on the basis of discounted rounds for multiple games in the region.
- Work with accommodation operators to develop golf packages that will broaden the appeal of golf as a destination activity.

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6. Marketing

6.1 The Role of Tourism Cowichan

Tourism Cowichan has put considerable effort into building market awareness for the region as the destination through regional branding, the ongoing development and distribution of the regional vacation planner, and a wide range of marketing activities. This regional focus should be maintained and supported in a manner that:

- Ensures consistency between regional and local messaging;
- Creates leverage between the two levels of marketing;
- Reduces duplication of effort;
- Maximizes scarce resources.

Tourism Cowichan's key role is to generate awareness for the destination as a whole – tourism stakeholders and communities should seek to capitalize on this and highlight unique selling propositions that will capture a specific component of this regional market demand. Where the objective is to attract a specific market, such as sport event planners or marine tourism segments, it is recommended that Tourism Cowichan and the local stakeholders work in partnership on collaborative marketing.

6.2 Target Markets and Audiences

In implementing a marketing strategy, consideration needs to be given to identifying the range of target markets and audiences. These can be grouped into two main categories – 'external' and 'internal' as follows:

External:

- Primary geographic markets:
 - ◀ British Columbia – particularly the near-in regional markets in Victoria and Nanaimo, and the Lower Mainland. This includes international visitors that are based in Victoria.
 - ◀ Anecdotal evidence suggests that the 'visiting friends and relatives' segment is a strong component.
- Secondary markets:
 - ◀ The Pacific North West – particularly in relation to marine tourism. In addition, there are direct flights from Victoria to San Francisco which opens up possibilities for strategic marketing.
 - ◀ Calgary, Edmonton and Ontario – direct flights to Victoria from these markets.
 - ◀ Europe.
- Niche markets:
 - ◀ Key niche sectors include golf, wine, culinary and agritourism, marine tourism, and the touring market.
 - ◀ The family market.
 - ◀ Sectors with potential to expand include arts and cultural heritage, sport tourism, and specific nature-based sectors such as mountain biking and trail cycling.
- Other external audiences:

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- < The travel trade – tour operators and travel agents.
- < The travel media.

Internal:

- All tourism stakeholders in the Cowichan region.
- The wider business community.
- Local, regional and provincial politicians and local and regional government staff.
- Local residents.
- Regional and provincial tourism organizations – Tourism Vancouver Island, the Ministry of Tourism, Culture and the Arts.
- Other near-in tourism and local government organizations – as a means of increasing regional collaboration.

6.3 Marketing Strategies

The following strategies and tactics focus on regional marketing. It is recognized that proposed activities not currently undertaken could only be pursued with new core funding. A new marketing plan that reflects coordinated stakeholder input should be developed in the event that there is a marked increase to core funding.

6.3.1 Targeting the Leisure Market

While funding for Tourism Cowichan remains at the current level, it is anticipated that the existing marketing activities will be maintained. Tourism Cowichan has had a high level of success in leveraging funds to date, and ongoing efforts to pursue marketing initiatives that offer a greater return on core investment will be pursued. Further emphasis on region-community collaborative marketing would increase the potential for cooperative marketing and would enhance current regional marketing activities. The ability to secure partnership funding through MTCA's *Community Tourism Opportunities* program will strengthen this partnership approach, as the Ministry's current emphasis is on collaborative activities.

Continue to implement a marketing strategy that focuses on building market awareness for Cowichan within the targeted markets, and increasing independent leisure travel visitation.

TACTICS:

- Continue to target key market segments through collaborative marketing and promotional activities with Tourism Vancouver Island and regional stakeholders.
 - Maintain current participation in relevant TVI consumer marketing programs, including a presence in the *Vacation Guide*, and related niche product publications.
 - Publications such as *Westworld* and the *British Columbia Magazine* reach wide audiences and are particularly appropriate given the significance of the touring market and niche product. Tourism Cowichan's ability to utilize these opportunities will depend on a strong commitment to cooperative marketing.
 - Maintain Tourism Cowichan's presence in the *Van Dop Arts & Cultural Guide*. Encourage stakeholders to participate in the related *Art of the Getaway* program.
 - Continue to utilize the regional media in the near-in markets. Work with stakeholders to

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develop special getaway packages and identify a call-to-action number that will be used to promote sales.

- Continue to develop and distribute the *Cowichan Travel Planner* and related Cowichan-focused publications. The Planner has been rewritten by a professional writer and has strong visual material and good maps that add substantially to the value of the publication as a travel planner.
 - It is critical that regional stakeholders recognize the value of these efforts and support the initiatives through cooperative marketing. Increased participation will assist in extending the distribution of the Planner.
- Maintain a presence at relevant consumer and lifestyle shows in the regional marketplace. Encourage a partnership approach with community stakeholders that will allow Tourism Cowichan to create a stronger presence and increase cost efficiencies.
 - Continue to evaluate relevancy of shows and provide feedback to stakeholders on perceived interest.
- Work with organizers of festivals and events to encourage the development of a marketing template that will generate awareness of both the region and the specific event. Use the template to cross-market forthcoming related events.
- Maintain an up-to-date media kit. A range of new 'stories' has been professionally written and this approach should be continued.
 - Continue to work with TVI media relations department to target relevant specialized media and travel writers with press releases.
- Continue to work with TVI and local stakeholders to host familiarization tours for travel trade and travel media delegates. There have been a number of excellent articles written by various media chronicling the Slow Food movement, the Pacific Marine Circle Route, vineyards and lifestyle – this focus should be maintained and stakeholders should be kept informed of successes in attracting media attention.

6.3.2 Attract New Markets

Section 5 has highlighted a range of product development initiatives. Progress in any of these areas will open up new market opportunities. Efforts to develop sport tourism, for example, will create the need for new collateral and specific marketing tactics designed to attract sport event planners, athletes and spectators.

Work with partners to develop new regional collateral for emerging products.

TACTICS:

- With the further development of market ready trails and the growing interest in activities such as off-road cycling and mountain biking, consideration should be given to developing a regional trails publication.
 - Provide trail descriptions, safety guidelines, rules of the trail (refer to the International Mountain Biking Association), distance and duration, activities, and degree of difficulty.
 - Consider working with CRD and Salt Spring Island to produce collateral for a circle route for cyclists.

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- Explore opportunities to develop new theme-based regional trails for different types of users. Use the internet as the medium initially to test interest in the product. Include interpretive content.
- Develop new collateral for sport tourism. Start with producing flat-sheets with quality images and an overview of the facilities. Include information on supportive community sport organizations.
- Encourage TVI to take the lead in working with BC Ferries to negotiate for competitive pricing that can be used in getaway packages.

Review the potential to utilize innovative packaging to create new interest in Cowichan and encourage increased visitor spend.

TACTICS:

- The planning discussions highlighted the need to work together to develop new packages.
 - Hold MTCA's Tourism Packaging and Product Distribution workshop from the Tourism Business Essentials program.
 - Encourage tourism operators to review the potential for adding value to existing experiences through packaging.
- Develop themed getaway packages for spring, fall and the winter seasons. Promote in the regional marketplace using local press and radio. Target specific market segments such as women or the leisure learning market.
 - Ensure that there is a 1-800 number call-to-action. Consider directing all enquiries to the new Duncan-Cowichan Visitor Centre and use the staff to promote 'sales'. Ensure that all Visitor Centre staff have a comprehensive level of knowledge regarding the various campaigns and alternative opportunities.
- Focus on encouraging the development of interactive / experiential product. Building a package around a learning or participatory experience associated with the region's key product sectors, will strengthen Cowichan's association with that particular product.
- Developing new sectors such as off-road trail biking or horse-back trail riding will be facilitated through creating packages with appropriate accommodation.

6.3.3 Internet Marketing

Develop a comprehensive regional internet marketing strategy that positions the Tourism Cowichan website as the recognized portal to the region, and ensures that the website has the capacity to drive new business to the region and to individual communities.

While progress has been made with the ongoing development of the Tourism Cowichan website and the Travel Planner can now be viewed on the website, this is an area of regional marketing that will need further investment. Given the significance of this medium in trip planning and the decision making cycle, it is imperative that this site showcases the region in a dynamic manner with timely and relevant information and in a way that reinforces the concept of a regional destination.

Ideally there should be one regional visitor website with all the various communities profiled on the site. At present the site links to the different community websites which creates an element of confusion for the visitor in navigating the sites. With one well-managed site there would be a comprehensive virtual visitor information service and a consistency in the look and feel of the messaging. Furthermore,

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working together in this manner would reduce costs and would allow for a more effective pooling of scarce resources. However, to do so effectively will require the development of a comprehensive internet strategy with input from the key stakeholders. This site should become a resource tool for a range of audiences, including local stakeholders and the travel trade, together with the prospective visitors.

TACTICS:

- As funding become available, use professional services to work with Tourism Cowichan in developing an internet marketing strategy for the region. Work with communities to ensure that any linked sites complement the regional message.
- Continue to keep the website high on internet searches. Utilize a search engine optimization program if necessary.
- As new collateral is developed, make it available to view on the website.
- Continue to maintain the event calendar and ensure that it is searchable by community. Resolve any issues concerning double entries.
- Continue to expand the image bank of visual material and B-roll for broadcast ensuring that it depicts all aspects of the visitor experience in Cowichan. These images should be used to add to the vitality of the existing website, highlight the diversity of regional product, and be available for travel writers and/or the travel trade. If a photographer is retained for this purpose, ensure that the images are available royalty-free for use in all media. High resolution images are required for all print purposes.
 - Develop partnership agreements with the communities to have shared use of visual material on a reciprocal basis.
- Work with MTCA to promote regional searches on www.HelloBC.com. Currently the site can only be searched by community.
- Continue to work with stakeholders to raise awareness regarding MTCA's Listings Program and encourage a high level of participation in the program. Stakeholders not participating will not be featured in HelloBC.com. Refer stakeholders to TourismBC.net for a comprehensive list of programs designed to assist stakeholders in connecting with consumers.
- Utilize travel blogging as a mechanism to generate new and ongoing interest in Cowichan and its range of experiences. The use of *Twitter* offers potential to attract attention to new products and special offers. Similarly mechanisms such as *Flickr* and *You Tube* provide opportunities for sharing visual material and unique moments, as does the Canadian Tourism Commission's *LocalsKnow.ca* website. (There is Cowichan-related *You Tube* material available on the web but its quality does not always do justice to the nature of the experience and the type of image that should be projected – this issue can be countered through developing and posting material on the Tourism Cowichan website).
 - Encourage blog entries on HelloBC and use the Share the Excitement!™ widget to highlight the blog entries from HelloBC on the Tourism Cowichan website.
 - Engage the services of a local writer to assist with blogging.
 - Use social media to reinforce print media campaigns.
- Develop opportunities for building permission-based/opt-in e-mail marketing data-base. Use this for

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targeted e-mail campaigns in addition to social media.

- Develop a page for the travel trade and tour operators. Develop and post suggested itineraries.
- Develop a corporate page for regional stakeholders. This can be password protected and should be used to disseminate relevant information such as the annual marketing plan and news features. An on-line version of the product inventory data-base could be maintained in this section of the website.
- Consider developing a 'mobi' site to enable the delivery of real-time mapping and local information to smart phone users within the region.
- Work with appropriate stakeholders to assess the issue of internet 'dead' zones in the Lake Cowichan area.

6.3.4 Tracking and Monitoring

Develop effective marketing feedback and control systems

Developing feedback and control mechanisms is essential to measuring the effectiveness of marketing and return on investment. These tracking mechanisms, together with an initiative to measure the value of tourism, will shape the ongoing planning process

TACTICS:

- Establish targets for the tourism plan and the marketing strategies that are measurable, and put systems in place to track and evaluate effectively.
- Use measuring devices and tracking systems for specific promotional campaigns and measure enquiries generated and actual sales.
 - Assist tourism businesses with developing similar tracking systems. Consider holding a training workshop on this subject.
- Develop procedures for assessing the effectiveness of public relations such as media space gained and number of feature articles in the press.
- Work with the website developer to ensure that there are analytics in place to measure use of the website.
- Use feedback measurements in the annual review of the tourism industry and in forward planning for marketing and product development.
 - Develop regular reports on performance and circulate to stakeholders.

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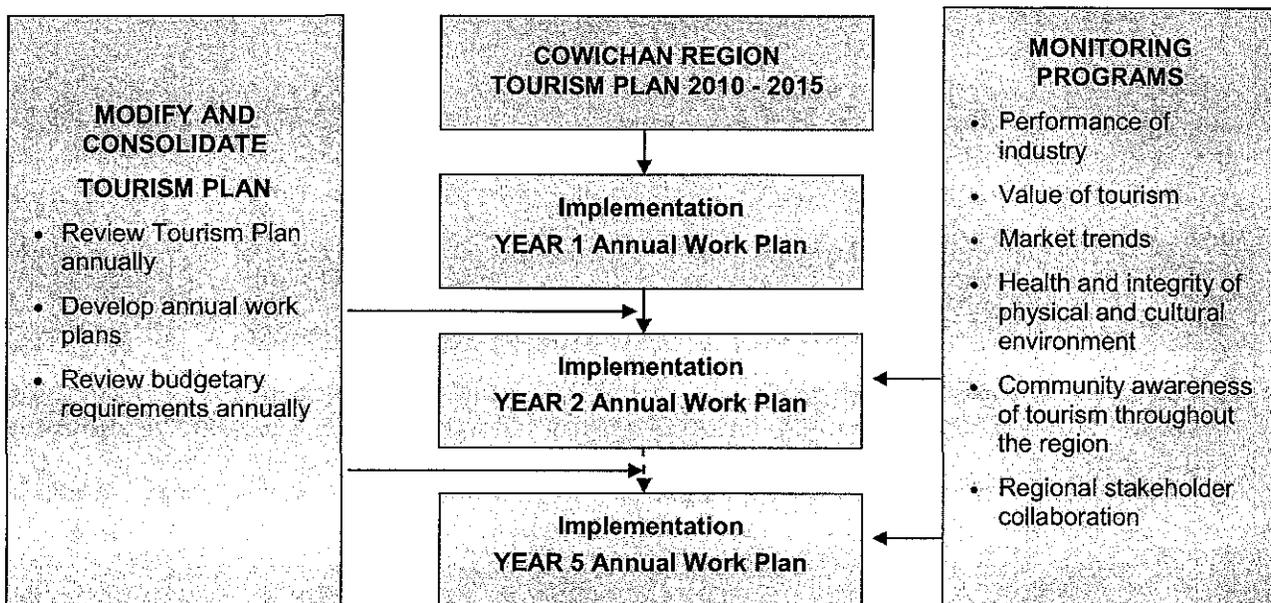
7. Annual Planning

Effective implementation of this Tourism Plan is dependent on maintaining the vision for a strong regional destination, effective collaboration, new sustainable core funding, and a commitment to ongoing planning and review.

This Tourism Plan provides strategic direction for the next five years. To move forward effectively, however, Tourism Cowichan and Economic Development Cowichan will need to use the Plan each year to identify immediate priorities and establish an Annual Work Plan. This should be done in consultation with the Tourism Advisory Committee, and efforts should be made to create synergies between proposed regional activities and what is being planned for locally.

The Annual Work Plan should highlight partners/stakeholders responsible for the implementation of each initiative. As core funding increases, the need for stakeholder input will likewise increase.

This Tourism Plan has emphasized the importance of regular monitoring. Such monitoring is essential for effective annual planning and for tracking the performance and growth of the tourism industry, and will become increasingly critical as funding increases and collaboration grows. The following exhibit summarizes the ongoing monitoring / planning cycle and demonstrates how the strategic directions for Cowichan can be refined and modified on the basis of progress and changing market trends. This ensures that the Cowichan Region Tourism Plan remains a **working** document.



Source: Tourism Planning Group.

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Appendix 1

The Planning Context

| Regional | |
|---|--|
| <p>The Cowichan Region Economic Development Strategy (2002)</p> | <p>This strategy was prepared following the establishment of the CVRD Economic Development Cowichan. The strategy represented an integration of a number of economic development initiatives that were proceeding throughout the region at that particular time. The goals and objectives listed included a number that related to tourism development and promotion:</p> <ul style="list-style-type: none"> • Tourist information centre development. • Image improvement strategy. • Duncan downtown revitalization strategy. • Highway corridor enhancement. • Gateway improvement. • Regional tourism action plan and regional tourism marketing strategy. • New regional tourism organization. • Enhancement of the agritourism sector in the region. • Upgrading the hospitality sector. • Tourism opportunities with First Nations. |
| <p>Tourism Cowichan Tourism Development Strategy (2007).</p> | <p>The title of the document produced in July 2007 is somewhat misleading as the report does not constitute a 'tourism strategy', but rather represents the findings and recommendations of a review of organizational structure and service delivery. Key issues highlighted related to:</p> <ul style="list-style-type: none"> • The need to upgrade Visitor Centres within the region and enhance their visibility. • The lack of cohesion between the Tourism Cowichan regional message and the 'internal' communications to visitors upon arrival. • The changing needs of the visitor and the importance of developing a stronger focus on the heritage, arts and cultural products within the region. • The need to streamline the provision of visitor services that are currently being offered by the region's five community Visitor Centres under the Chambers of Commerce. • The potential for regionalizing a range of tourism support functions, including visitor services, marketing, planning and development, while ensuring that communities have the capacity to maintain their own identities. • The importance of building evaluation tools and metrics into relevant tourism programs. <p>Key recommendations included:</p> <ul style="list-style-type: none"> • Create an expanded model of Tourism Cowichan for service delivery and industry development. • Complete a detailed analysis of the product inventory in the region, business profiles, employment, and visitor profiles. • Tourism Cowichan continue to provide regional external marketing involving the various communities in promoting their products. • Tourism Cowichan develop network partnerships with external stakeholders. |

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| <p>Highways and Roads Tourism Signage Program for the Cowichan Valley Regional District (2007)</p> | <p>The regional report highlighted the following:</p> <ul style="list-style-type: none"> • Signage clutter with an abundance of signage that replicate messages and cause visual confusion. • Illegal or non-conforming signs generally erected by specific business owners or operators. • Signage maintenance concerns with a number of existing signs being in a state of disrepair. • A lack of signage coordination within the Region and a general disconnect between the different jurisdictions. • A lack of sign consistency and no distinguishing feature on the signage that would remind the visitor that they are in the Cowichan Region. <p>On the basis of these findings there were recommendations to develop a regional signage program that would include the installation and completion of Regional Gateways and would see tourism visitor signage as an integrated component of tourism policies on information, promotion and regional development.</p> |
| <p>Sector</p> | |
| <p>The Commercial Marine-Based Tourism Study Report (2005) Vaugeois, N.L. et al, 2005</p> | <p>This report together with the work undertaken on marine tourism trends (Economic Planning Group and Quest Land Services Inc., March 2005, <i>Marine Tourism Trends</i>, prepared for the Cowichan/Ladysmith Tourism Authority) represented an analysis of the region's marine tourism industry and identified key areas of concern to be addressed in the strategic development of the sector. It highlighted the need to:</p> <ul style="list-style-type: none"> • Expand infrastructure for the marine tourism industry such as increasing transient boat moorage, parking and trail ways. • Clarify multi-jurisdictional responsibilities to facilitate the process of business expansion. • Ensure smoother application and renewal processes for land and water leases. • Develop a marine tourism marketing strategy. • Link products and services for visitors through effective packaging and marketing. • Provide support for business development and survival, particularly given that many of the operators are small businesses with insufficient capacity to maximize the growth of their business. • Resolve land issues. • Ensure integrated planning occurs. |
| <p>Community</p> | |
| <p>Ladysmith Tourism Plan (2006)</p> | <p>A series of tactics based on the following mission statement: "Ladysmith is committed to growing tourism while maintaining the small town charm, heritage, and cultural aspects of the community. This will be accomplished by encouraging the development of high quality tourism experiences that are of interest to visitors, working in partnership with area communities, other tourism organizations and tourism related businesses".</p> <p>A review session held in 2008 highlighted tactics for the subsequent years in the following order of priority: signage, community aesthetic appeal, promote to Island markets and work cooperatively with Tourism Cowichan and Tourism Vancouver Island, friends and family campaign, securing sustainable funding, local parking, raising awareness regarding tourism, and packaging.</p> |

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| <p>Duncan Tourism Development Plan 2009-2014 (2009)</p> | <p>This Plan emphasized the need to develop a regional tourism plan and to strengthen Tourism Cowichan as the lead tourism organization within the region and expand its role. A series of tactics were recommended that related to the following strategic action areas:</p> <ul style="list-style-type: none">• Strengthening regional and local organizational capacity to deliver tourism effectively.• Enhancing the attractiveness of Downtown as a core visitor product / experience.• Improving the competitiveness of Duncan through strengthening and consolidating existing product offerings.• Improving the competitiveness of Duncan through servicing the visitor effectively, and delivering a memorable experience.• Supporting Tourism Cowichan in undertaking key destination management functions that will assist in strengthening the tourism industry regionally and locally.• Increasing awareness of the Duncan area in the regional markets, and generating a greater volume of visitors and increased visitor spending in the community year round.• Strengthening the tourism industry locally through building a greater appreciation for tourism within the Duncan area and supporting Tourism Cowichan in related tactics. |
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Appendix 2

Summary of Current Situation

| Cowichan Region Tourism Industry – Overview of Current Situation | |
|---|--|
| <p>Macro Environment – Trends and Issues</p> <ul style="list-style-type: none"> • Global economic volatility – decline in occupancy rates throughout the province since fall 2008. • Changing demographics. • Growth in niche/experiential tourism – arts and culture, nature-based/ecotourism etc. • Growth of online bookings and use of internet throughout the purchase cycle from trip planning to experience. • Increased demand for short breaks. • Increased demand for quality and authenticity. • Growing emphasis on integrating environmentally sustainable and socially responsible business practices into tourism business operations. • Recognition of the need to look at tourism as a system of inter-related parts and to develop a planning approach that looks at the total system. | |
| <p>The Market Context</p> <ul style="list-style-type: none"> • Strong regional market. • There has been a steady growth in room revenue through to mid 2008 with an 80% increase in the past ten-year period and a 70% increase in RevPAR (revenue per available room). The corresponding figures for Vancouver Island as a whole are 55% increase in room revenue and 37% increase in RevPAR. • CVRD room revenue represents 3.5% of Vancouver Island room revenue. • Day trippers and 'visiting friends and relatives' are key sectors. • Bus tours are significant to Chemainus. • Two-thirds of the Duncan/North Cowichan hotel business is from the business sector. | |
| <p>Location</p> <ul style="list-style-type: none"> • Proximity to close-in regional markets – particularly Victoria and Nanaimo. • Excellent access by road, ferry, air, and by recreational marine mode of travel. • Warm temperate climate year round. • Paved route to Port Renfrew opens up new opportunities for circle route development. | |
| <p>Defining the 'Personality' of the Region</p> <p>STAKEHOLDERS' PERSPECTIVES</p> <p>(Based on workshop responses to the question "How would you define the 'personality of the Cowichan Region?")</p> <ul style="list-style-type: none"> • "Free-spirited people" / laid back / eclectic • Passionate • Unique lifestyle – 'touch' of Tuscany | <p>STAKEHOLDERS' PERSPECTIVES</p> <ul style="list-style-type: none"> • Diverse • Friendly • Little known / 'best kept secret' / secret paradise • Marine character / coastal retreat • Industrious / hard working • Creative / artistic |

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Cowichan Region Tourism Industry – Overview of Current Situation

- Semi-rural; country roads / natural green – lush
- Authentic & unique stories
- Low-key affluence

VISITORS' PERSPECTIVES

- In response to the question: - *"How would you describe the atmosphere or mood in the Cowichan Valley?"*

| | Mood Associated With Cowichan Valley |
|----------------------------|--------------------------------------|
| Base | 297 |
| Casual/laid back | 29.9% |
| Relaxing/relaxation | 23.5% |
| Friendly/friendly people | 21.5% |
| Calm/quiet/peaceful | 18.8% |
| Beautiful view/scenery | 8.5% |
| Small/small town/community | 7.0% |
| Good/great/excellent | 6.0% |
| Rural/rustic | 6.0% |
| Welcoming/inviting | 3.2% |
| Natural/outdoorsy | 3.2% |
| Happy/cheerful | 2.7% |
| Pleasant | 2.6% |
| Busy | 1.9% |

(findings from Tourism BC's *Community Tourism Foundations Perceptions/Incidence Study 2008 – overnight Trips to Cowichan Valley* [internal report undertaken by TNS Canadian Facts])

- It is interesting to note that the "laid back" qualities were clearly top-of-mind for both stakeholders and the survey respondents, and that "friendliness" was seen as a distinct attribute in both sets of responses. In keeping with the local landscapes, the serenity and rurality of the region are common themes

VISITORS' PERSPECTIVES

- In response to the question: *"When you think of Cowichan Valley, what three activities first come to mind?"*

| | Activities Associated With Cowichan Valley |
|--------------------------------------|--|
| Base | 297 |
| General sightseeing | 36.1% |
| Hiking | 30.3% |
| Beaches/water sports/lakes | 26.0% |
| Arts/culture/historic sites/theatre | 21.9% |
| Fishing | 21.9% |
| Camping | 19.4% |
| Shopping | 18.2% |
| Wineries/farm based | 14.8% |
| Nothing in particular/don't know | 14.7% |
| Other outdoors/activities/wilderness | 12.0% |
| Visiting friends or relatives | 11.4% |
| Boating/sailing/kayaking/canoeing | 10.5% |
| Relaxing | 10.2% |
| Dining | 9.7% |
| Golfing | 7.9% |

(findings from Tourism BC's *Community Tourism Foundations Perceptions/Incidence Study 2008 – overnight Trips to Cowichan Valley* [internal report undertaken by TNS Canadian Facts])

Organizational Structure

STRENGTHS

- Supportive political context.
- Tourism Cowichan and Economic Development Cowichan have a regional role in tourism, and Tourism Cowichan takes a lead in promoting the region as a destination.
- Strong level of interest in developing a regional approach to the delivery of visitor services.
- Support in place for restructuring Tourism Cowichan and strengthening its role as a public-private partnership based organization that represents all stakeholders.

Organizational Structure

CONSTRAINTS / AREAS OF CONCERN

- The current approach to planning, development and delivery of visitor services is not coordinated. This lack of coordination is heightened by the localization of visitor services with four Visitor Centres and one Visitor Booth run by five different Chambers of Commerce.
- Chambers are based on a membership model – this raises issues with promoting all stakeholders. Currently tourism businesses have to deal with multiple racking fees.
- Insufficient core funding for Tourism Cowichan if it is to take an effective lead in developing and promoting the

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| Cowichan Region Tourism Industry – Overview of Current Situation | |
|--|---|
| <ul style="list-style-type: none"> • Tourism is generally well recognized and integrated in Official Community Plans in the larger communities – less integration in the rural areas. • Municipalities and the Regional District have a key role to play in developing and maintaining infrastructure that will facilitate the visitor experience, such as trails and connectivity. This role is recognized in OCPs • Local tourism advisory committee in Ladysmith; City of Duncan is in the process of establishing a similar structure. • Cowichan Valley Arts Council – has a regional perspective. • Regional District has just created an arts and culture position on staff. | <p>tourism industry – current funds amount to \$120,000 for operational and marketing costs. This level of funding has not changed since its introduction in 2003. The Additional Hotel Room Tax is not in place.</p> <ul style="list-style-type: none"> • Lack of funds at the community level – need to ensure that scarce resources are being used to best effect and that duplication of effort is minimalized. |
| <p>Tourism Management STRENGTHS</p> <ul style="list-style-type: none"> • Partial product inventory exists with Tourism Cowichan – further input from communities needed. • Increasing emphasis on regular communication with stakeholders within the region through Tourism Cowichan. | <p>Tourism Management CONSTRAINTS / AREAS OF CONCERN</p> <ul style="list-style-type: none"> • A need for greater coordination of stakeholders throughout the region – has the potential to improve through a restructured Tourism Cowichan. • General lack of appreciation for the value of tourism to the local economy and lack of awareness of product within the resident population and business community. Lack of communication between key organizations at the local level – has created issues with event planning. • Growing problems with generating sufficient volunteer capacity for managing community events. • Lack of networking to link sectors and potential partners together. • The quality of the visitor experience at attractions varies. • No research and monitoring mechanisms in place. • Limited capacity to pursue grants. |
| <p>Community and Regional Infrastructure STRENGTHS</p> <ul style="list-style-type: none"> • Cross-section of accommodation – extensive B&B product. EDC report on accommodation (2008) indicates that there are 54 B&B properties, approximately 700 hotel/motel/resort rooms from 40 establishments. Many of these properties are small (average size is 16 rooms). The Region has 3 national chains. Range of campsites. • Variety of retail and boutique shopping experiences in community centres. Ladysmith was voted one of Canada's ten prettiest towns by Harrowsmith Country Life magazine; Duncan is renowned for its historic old | <p>Community and Regional Infrastructure CONSTRAINTS / AREAS OF CONCERN</p> <ul style="list-style-type: none"> • Accommodation regarded as insufficient at peak times – otherwise low capacity. The planning discussions raised issues concerning quality in elements of the accommodation profile and challenges with the over-abundance of rooms in Victoria and Nanaimo. Concerns were raised over the lack of adequate accommodation in Lake Cowichan and Ladysmith. • Signage issues throughout the region – a range of site-specific concerns particularly with communities off the Highway, such as Chemainus, and for a wide range of |

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Cowichan Region Tourism Industry – Overview of Current Situation

town quarter; the murals add a unique quality to the retail context in Chemainus; and other smaller settlements all have specific attributes and characteristics that contribute to the retail experience. Whippletree Junction has a specific historic appeal that adds to its attractiveness.

- Range of community markets and Farmers Markets such as those held in Duncan, Cedar and Chemainus.

attractions and B&Bs. Regional signage strategy completed but not yet implemented. Local signage study completed in Ladysmith – still to be implemented. No sense of 'arrival' to the destination.

- Intra-regional transportation issues – inadequate linkages between communities and from the marinas to communities – these issues reduce the region's ability to spread the benefits and create a service issue.
- Rail service exists but scheduling issues reduce its potential as a mode of transport.
- Waterfront infrastructure issues – inadequate moorage, issues with the Ladysmith waterfront area; no waterfront dining in Chemainus.
- Range of marine tourism sector infrastructural issues – see below.
- Localized beautification concerns in communities – need for ongoing revitalization of streetscapes.
- Communities such as Duncan continue to have few Downtown retail outlets open in the evenings or Sundays.

Tourism Product

MARINE TOURISM

STRENGTHS

- Strong growth potential – a high value sector that attracts international markets – (4,000 boats at Maple Bay Marina over a 10-week period in 2009; 600 boats over-hauled).
- Access to ocean east and west of region.
- Protected and safe waterways; protected, scenic anchorages; one of the region's unique qualities is its naturally protected bay/coves for all marine activities.
- Gulf Islands archipelago is one of a kind on a world basis; proximity to Gulf Islands National Park Reserve
- Excellent waters for water diving particularly at Chemainus and Maple Bay – wide variety of species; sunken plane attraction at Chemainus.
- Relatively easy access to trails with outstanding views.
- Opportunities to offer a range of marine sports, kayaking, whale watching – e.g. at Cowichan Bay.
- Ladysmith – close proximity to large harbour.

MARINE TOURISM

CONSTRAINTS / AREAS OF CONCERN

- Low awareness of the value of this sector – insufficient community support.
- Regulatory issues and dock space.
- Infrastructure – lack of pump out facilities; need for upgraded services for recreational boaters; berth (moorage) space.
- Transportation issues – see above – creates problems in spreading the potential benefits from this sector and impacts the visitor experience.
- Downturn in economy; high cost of fuel; high initial cost of entry (i.e. buying the boat).
- Need for coastal map with activities, stop over points, recreational boating/marine services/facilities/amenities.
- Limited fish (for fishing industry); "weather window" of a few months.
- Lack of charter boats.
- Access issues – need water to shore access within region for kayakers e.g. Octopus Point, Sansum Narrows North & South end, Mt Maxwell etc.

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Cowichan Region Tourism Industry – Overview of Current Situation

NATURE-BASED & FRESH WATER-BASED TOURISM STRENGTHS

- Soft adventure / ecotourism: hiking, wildlife viewing, bird watching – range of existing product and significant potential for new opportunities. Product includes a number of regional and provincial parks.
- Strong actual and potential trail product, including the Trans Canada Trail and iconic features such as the Kinsol Trestle.
- Mountain biking (Tzouhalem) and road biking (Yellow Point).
- Water-based sector – low current value but growing.
- Cowichan River – heritage river; long, clean, warm river – free flowing.
- Lake Cowichan area – wide range of outdoor opportunities associated with the lake, hiking, camping, and accessing the west coast – strong baby-boom/day visit market + cabin users & tenters from the Lower Mainland. Significant opportunity to develop ecotourism sector. Annual events such as the Great Lake Walk.
- North Cowichan / Duncan area includes nature-based attractions – Pacific North West Raptors, BC Forest Discovery Centre, Somenos Marsh.
- Shawnigan Lake – water sports, Subaru Shawnigan Lake International Triathlon.
- Private school regattas.

ARTS, CULTURE & HERITAGE TOURISM STRENGTHS

- Strong base of artisans – encompasses all communities.
- High potential for low/shoulder season growth.
- Range of festivals and events – potential to strengthen regional events.
- Strong First Nations presence and product – e.g.

- Access to capital.
- Marketing message relatively weak - need more cross-marketing. Lack of awareness of available tourism alternatives (activities/ festivals/events) to encourage people to stay longer.
- Specific community issues – e.g. Ladysmith – needs marine fuel and pump out for Harbour; Chemainus – poor beach access / facilities; Crofton – contaminated waterfront area that needs remediation.

NATURE-BASED & FRESH WATER-BASED TOURISM CONSTRAINTS / AREAS OF CONCERN

- Insufficient analysis of resource base.
- Lack of interpretive trail maps for area parks.
- No guided interpretive services.
- Inadequate way-finding signage and poorly marked trail heads in areas.
- Cowichan Lake – limited marina opportunities given the size of the Lake; land ownership issues – most of the surrounding area is owned by forestry companies.
- North Cowichan – scope to further develop support infrastructure for mountain biking.

ARTS, CULTURE & HERITAGE TOURISM CONSTRAINTS / AREAS OF CONCERN

- Product not packaged sufficiently to create critical mass; fragmented marketing.
- No database of artists.
- Lack of stakeholder involvement and coordination – no coordination of arts related events.

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Cowichan Region Tourism Industry – Overview of Current Situation

- Cowichan International Aboriginal Film & Art Festival.
- Strong regional audience.
- Local communities have significant product: Chemainus – unique collection of murals depicting the story of Chemainus, a professional theatre company and the ability to offer theatre packages, museums and heritage trails; Ladysmith – downtown heritage; North Cowichan / Duncan – Quw'utsun' Cultural & Conference Centre, Downtown Duncan with its totem poles, theatre, museum, and a wide range of festivals and special events; South Cowichan – an array of studios and galleries.
- Christmas festivities – e.g. the Christmas Train, Ladysmith Festival of Light – creates potential for winter tourist development.
- Growth in 'garden' tourism.

AGRITOURISM & VINICULTURE

STRENGTHS

- Strong natural attributes – soil, weather, micro-climate – results in a wide range of agri-product.
- Pastoral landscapes.
- Local awareness of healthy foods.
- Growth in culinary tourism – new Cowichan Bay Spot Prawn Festival, Cowichan Harvest Festival, Cowichan Wine and Culinary Festival.
- Cowichan Bay – first *Cittaslow* community in North America (2009).
- Significant potential for growth.
- Strong B&B tradition – should build on this with the development of farm stays.
- Potential to develop 'experiential' product.
- Farmers Markets – reinforces the role of agri-sectors in the local economy.

SPORT TOURISM (including GOLF)

STRENGTHS

- Significant facility base for sport events particularly in the Duncan/North Cowichan area (Cowichan Sportsplex, Cowichan Centre, Aquatics Centre)
- Ongoing development of facilities: Ladysmith – all weather sports field to be completed March 2011; Lake Cowichan – expansion of Cowichan Lake Sports Arena.
- Hosting of the North American Indigenous Games in

- Weak presence on the web.
- Irregular signage.

AGRITOURISM & VINICULTURE

CONSTRAINTS / AREAS OF CONCERN

- Lack of person to liaise with stakeholders – need to build networks and business capacity.
- Potential to cross-market with arts and culture and other product areas not being developed.
- Lack of educational / business advisory services for agri-businesses to assist in developing viable tourism experiences.
- Concern regarding bylaws and accommodation on agricultural properties.
- South Cowichan – need to improve accessibility to wineries and farms in winter months.

SPORT TOURISM (including GOLF)

CONSTRAINTS / AREAS OF CONCERN

- No coordinated, strategic approach to pursuing the sport event market.
- Little buy-in on sport tourism – very fragmented sector. Resentment from local users over use of facilities by visitors – needs to be addressed through a program of community awareness on value of sport tourism.
- Lack of high-end accommodation for golf packages –

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| Cowichan Region Tourism Industry – Overview of Current Situation | |
|---|---|
| <p>2008 was highly successful – potential to build on this success.</p> <ul style="list-style-type: none"> • Lake Cowichan – offers a range of sport events and sport training camps, including curling bonspiel, the Annual Great Lake Walk and Ultra-Marathon, and the Cowichan Lake Marathon. • Strong golf product – range of opportunities: Arbutus Ridge Golf Club; Cowichan Golf and Country Club; Duncan Meadows Golf Club; March Meadows Golf Course; and Mount Brenton Golf Course. • Cowichan Golf and Duncan Meadows – participate in the Golf Vancouver Island Trail – offers golf packages. | <ul style="list-style-type: none"> • need for a boutique hotel associated with this sector. • Seniors – generally an untapped market. |
| <p>Marketing and Communications STRENGTHS</p> <ul style="list-style-type: none"> • Tourism Cowichan has taken the lead on marketing and promoting the region – vacation planner (print & online), refreshed website with stakeholder listings + events; editorial text in Planner completely rewritten by a professional writer. • Planner distributed throughout BC, and at regional airports, and the Coho Ferry. In 2010 distribution will include the Tsawwassen to Duke Point ferry. • Other Tourism Cowichan marketing activities include: <ul style="list-style-type: none"> ○ Weekly promotional campaign in regional media May – October. ○ Enhancing the Cowichan Free Map, the BC Ferries Rack Card and materials for the Culinary and Wine Festival. ○ 2010 Canwest Calendar Campaign. ○ Working with stakeholders to host familiarization tours. ○ Developing strategic partnerships to increase ‘voice’ – e.g. worked with TVI on media events at the Olympics – “A Taste of Vancouver Island ...”. ○ Travel trade and travel media tactics – contracted a writer to develop media kits – distributed on USB memory sticks; stories are regularly passed up-line to TBC through TVI. ○ Trade and consumer shows. • Ladysmith – has expanded its marketing efforts – includes an increased image bank; a refreshed brand and visual identity – “Ladysmith, A View to the Sea”; and a new website – www.ladysmithtourism.ca. | <p>Marketing and Communications CONSTRAINTS / AREAS OF CONCERN</p> <ul style="list-style-type: none"> • A perceived lack of activities for visitors. • Although Tourism Cowichan has taken a lead in marketing the region, issues remain regarding a lack of coordination and duplication of effort between what is happening at the community and regional levels. • Insufficient focus on pooling scarce marketing funds. • ‘Cowichan’ not found on HelloBC. • Potential to expand mobile marketing and trip planning. • Potential to expand familiarization tours through Tourism Cowichan, TVI and Tourism BC – need further cooperation from stakeholders. • Insufficient integration of sectors, limited cross-marketing and packaging within the region. • Need to focus on search engine optimization and consider online advertising. • Need to strengthen the positioning of communities under the regional umbrella. • There is a need for a section entitled “What to do in the Cowichan Region” brochure. • Stakeholders maintain that there is greater scope to claim the region’s ‘fame’ – more artists per capita than anywhere in North America, ‘B&B Capital of Canada’, ‘Winter home of the Trumpeter Swans’, ‘Warmest winter holiday in Canada!’, ‘Golfing and Wineries in Winter’. • Issues with the Tourism Cowichan website linking to the Ladysmith VC – this connects to the Chamber website (organization responsible for VC) and does not connect to the new tourism website. • Need training for local businesses on marketing and |

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| Cowichan Region Tourism Industry – Overview of Current Situation | |
|---|---|
| | <p>presentation to visitors.</p> <ul style="list-style-type: none">• Chemainus – community cannot afford to market in Lower Mainland. It feels that it needs to focus resources on Victoria but the margins are slim.• South Cowichan – poor web presence. |

Things look better from here.



**TOURISM
COWICHAN
DEVELOPMENT
STRATEGY**

December 5, 2007

Prepared by:
White Oak Consulting
Mona Mattei

On Behalf of:
Economic Development Commission
Cowichan Valley Regional District

Things look better from here.



TOURISM COWICHAN RECOMMENDATIONS REPORT
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Things look better from here.



EXECUTIVE SUMMARY

The Cowichan Region encompasses 373,000 hectares from coast to coast in the southern part of Vancouver Island. With a population of 79,000, it is nestled between Victoria and Nanaimo. Including 9 regional areas and 4 municipalities, the region has been explored by visitors seeking a variety of experiences from the wine industry and First Nations traditions, to heritage sites, and outdoor adventure. The overall challenge for the region is to increase the visitor base and provide growth opportunities for the tourism industry. One of the significant challenges for the region is the proximity to the visitors' entry point to the Island. In such a location, visitors are often just starting their tour and do not stop as readily once they are on the road. This proximity, however, is also a benefit for the accessibility of the region as a day trip destination from both Nanaimo and Victoria. With an already established marketing cooperative – Tourism Cowichan – the Economic Development Commission determined a need to explore how the region could increase the visitor potential through visitor services in each community and further tourism development in the whole area.

The decision to review visitor services was initiated as a result of community meetings held throughout the region in 2005. At that time, and after discussions with Chamber representatives, there was a decision to pursue a review of services with an interest in collaborating regionally. With the constraints on each centre for funding and support, the idea that some collaboration or coordination between centres could benefit each organization involved by decreasing administrative and volunteer burden. Other than in large city centres where one organization runs all the visitor services, there is no model in the Province for a different way of coordinating activities between separate communities with different organizations. The Cowichan region, in embracing the opportunity to realize common goals and service efficiencies, is among the first to explore the potential to not only streamline service delivery, but also to create a different visitor experience which will have a far reaching impact for the entire region.

The Economic Development Commission, Cowichan Valley Regional District (CVRD) retained White Oak Consulting to perform the review and to provide recommendations for the improvement of Visitor Services and the coordination of tourism development for the Cowichan. The Economic Development Commission oversaw the project. This document will provide the background to the existing tourism activities in the area with factual information from various reports and provides the basis of recommendations for a regional strategy. Information for this report was drawn from: Ladysmith Situation Analysis, Community Tourism Foundations, 2006; Tourism B.C. Research; Tourism Vancouver Island; B.C. Statistics; and other research completed by the consultant.

Conclusions from the situation analysis report are:

- 1. Being located along two highway routes, the Cowichan region is well placed to capture larger numbers of visitors by using its location on the highways to its advantage. In addition, the proximity to both Nanaimo and Victoria, key entry points to the Island, provide more opportunities to attract an increased number of visitors with a targeted campaign.**
- 2. Tourism Cowichan has created a recognizable brand and developed marketing campaigns which are seeing results. The regional marketing message has been developed through a collaborative effort. There is little visibility of the marketing message in the regional services so the visitor experience is disjointed.**

Things look better from here.



3. While the primary targets for visitors have been outdoor adventure – land and water based – there will be a need to address the demographic shift to soft adventure and other experiences. Developing the heritage, arts and cultural products of the region in order to meet the changing needs of the traveling public will be important to the Cowichan in maintaining its unique attributes.
4. Visitor services across the region provide almost identical services in each location. With insufficient funding (most centres must do annual fundraising activities) and low staff levels some of the administrative burden of the services could be regionalized.
5. Interviews and community meetings across the region showed support for the development of a regional visitor service function which creates a network of visitor centres, provides planning and development, and which includes the marketing function.
6. Evaluation tools and metrics must be built into the program wherever possible.

Options for Visitor Services

This report reviews three possible options for the enhancement and development of visitor services across the Cowichan region. Each option model will outline advantages, disadvantages, administration and funding implications, implementation requirements, and constraints on the model.

It is important to note that there are existing visitor centres in South Cowichan, Duncan, Chemainus, Ladysmith, and Lake Cowichan. South Cowichan is considering a move for their future, and Duncan is actively pursuing a new location for their visitor centre.

The three models explored are:

Option 1: regional visitor centre,

Option 2: visitor centre network, and

Option 3: visitor centre regional management.

Options for Coordination of Tourism Development

Tourism is a major industry in Canada and serves as a vital component of many economies. Today virtually every major municipality in the country has an organization with a basic mandate to promote the municipality or region as a tourism destination. Typically these organizations are called destination marketing organizations or DMO. These organizations bear responsibility to act as a linking pin between the supply and demand in the tourism economic equation. They are a conduit between the community tourism assets and the demand elements of the market. The tools used are largely information and communication and the process is marketing. The DMO can also serve as a coordination / collaboration mechanism working with stakeholders and suppliers of tourism assets, specifically public and private interests as well as the citizens of a community, to help develop an appealing and reliable tourism product.

Things look better from here.



Three options reviewed for coordinating tourism development area:

Option 1: independent community organizations,

Option 2: regional destination marketing organization, and

Option 3: regional tourism management organization.

Recommendation for Model

In describing the models for service delivery and tourism development, it becomes clear that there is no **value** in changing a visitor service delivery system without including destination marketing and industry development. There is no **purpose** in changing visitor services delivery if there is no regional message. It is impossible to isolate the marketing message from the service provided to visitors on the ground. In the case of Tourism Cowichan, the early mandate and direction for the marketing message has been developed with branding and external campaigns. There is currently a disconnection between the message being produced externally, and the internal reflection of that message. This disconnection has been due to the initial goal and focus on external marketing, limited funding to encourage branding at the local level and the limited ability for the region to support the uptake of the brand and messaging in the various communities.

All the scenarios listed above require commitment to funding and administration. If a plan is to actually achieve implementation, it must be supported by core funding. All past efforts have often been shelved by a decision not to work at the regional level or because resource allocation was not available. With the current commitment at the provincial level for funding, and the challenge to double visitor volume by 2015 the Cowichan is able to take advantage of current trends to benefit regional initiatives.

While there are many ways to mix and match the models outlined, and a variety of alternatives for funding, the model recommended below blends the development of a regional tourism organization with a visitor network. These models indicate the most likelihood of success based on the evaluations above and the input from the local communities.

The new Tourism Cowichan's primary role will be to grow visitor expenditures in the region, to provide sustainable economic, environmental, social, and cultural wealth opportunities to the local communities. Tourism Cowichan will achieve this through: generic branding and promotion of the region to attract visitors; advocating for and facilitating destination management planning; managing regional visitor services; and facilitating or providing business development support for industry and product development.

Funding for Tourism Cowichan must be provided at a base core level from the regional government. How the regional government provides these funds will need to be determined. A hotel tax is the most successful in other areas of the province, often providing a larger source of funds than expected. In the Cowichan there would be some inequities as there are few motels / hotels in comparison to bed & breakfast facilities. There has been some discussion at the provincial level of imposing this tax across the province to equalize access to marketing funds for every region.

It is important to note that Tourism Cowichan already provides the cooperative regional marketing, the brand is in place, and many product development initiatives have already started. This model solidifies the work of the committee in a formal manner and introduces the additional responsibility for the visitor services network

Things look better from here.



Conclusions

The Cowichan region has committed to work together regionally to create a brand and develop marketing initiatives with limited resources. Discussions on the next steps to develop the tourism industry shows the communities are of a mixed mind on what direction is the best to follow. The development of a Regional Tourism Organization (RTO) will provide the leadership to continue development of the tourism industry in a planned, structured manner which will ultimately create the foundation for successful growth.

In order to create a successful development program the following recommendations need to be implemented:

RECOMMENDATION #1:

Create an expanded model of Tourism Cowichan for service delivery and industry development.

RECOMMENDATION #2:

Complete a detailed analysis of the product inventory in the region, business profiles, employment, and visitor profiles in conjunction with Malaspina University College.

RECOMMENDATION #3:

Tourism Cowichan continue to provide regional external marketing involving the various communities in promoting their products. The pooling of funding to have professional quality promotions is essential. Improvements to the web site to align with the work being done locally in the communities is important. Tourism Cowichan should work to expand the target markets by working with nearby tourism professionals to increase visits from referrals. Expansion of the brand awareness in the local visitor centres and on internal marketing collateral is needed.

Recommendation #4:

That Tourism Cowichan develop important network partnerships with external tourism professionals, regional tourism professionals, local stakeholders and other regional government departments. A communication protocol must be developed for information dispersal with stakeholders, Committee, and staff.

Along with these four key recommendations a full implementation plan and suggestions for annual budgets are provided. Not only does this program require a commitment from the regional government to implement it, but also core funding must be secured. Potential revenue sources include the need to explore the 2% hotel tax to assist with core funding. Project based funding needs could be secured through: Island Coastal Economic Trust; Tourism Vancouver Island (TVI); Tourism B.C., and upcoming UBCM Community Tourism phases.

Key to the implementation of this program is the need to track results and ensure that there is appropriate return on investment. The baseline research project suggested to be undertaken with Malaspina University College should be followed up by developing annual data collection protocols.

Tourism can be increased by sustained, well targeted, and professional initiatives. To identify and attract the high value customer, to build attendance levels, extend length of stay, expand the seasons and increase economic impact, products must be competitive, there must be a sophisticated marketing and promotions program, a stable tourism organization, and the resources necessary to attract and service visitors.

Things look better from here.



Combining regional funding and skills makes sense in an area where there are limited resources. Further, ensuring the alignment of local visitor services with the overall strategy is critical. Administrative and cost burdens on small visitor centres can be alleviated through joint activities such as training, and publication distribution. The development of clear visitor centres at strategic locations and at least one on the highway will ensure a larger number of visitors choose to stop and stay in the Cowichan.

INTRODUCTION AND METHODOLOGY

In 2002 the Cowichan Economic Development Commission including representatives from every regional area and municipalities in the Cowichan prioritized tourism as part of the economic development program. As a part of this process, in 2004 the Economic Development Commission, with tourism stakeholders, initiated and developed the Cowichan brand and external marketing campaigns. In 2006 the Tourism Advisory Committee for the Cowichan area at the Economic Development Commission identified the need for further tourism development through community meetings, and discussions with Chamber of Commerce representatives. Following on the successes of the regional marketing program, the Committee recognized the potential for development of this sector, and in particular the benefits of working regionally in pooling funding and talent to increase the impact on marketing and development initiatives. As a part of this regional outlook, the Committee explored the potential to work collaboratively in other areas of tourism and in particular the delivery of visitor services across the region. The Economic Development Commission led this initiative and funding was accessed through the Union of B.C. Municipalities Community Tourism Program. White Oak Consulting was retained to assess the current services and make recommendations for future development. While the Cowichan region has been welcoming visitors for many years, the area has primarily been a stopover for travelers en route to other destinations. The goal for the industry is to increase the number of visitors who stop and to lengthen their stay in the community thereby impacting on all the sectors of the economy.

The decision to review visitor services was initiated as a result of community meetings held throughout the region in 2005. At that time, and after discussions with Chamber representatives, there was a decision to pursue a review of services with an interest in collaborating regionally. With the constraints on each centre for funding and support, the idea that some collaboration or coordination between centres could benefit each organization involved by decreasing administrative and volunteer burden. Other than in large city centres where one organization runs all the visitor services, there is no model in the Province for a different way of coordinating activities between separate communities with different organizations. The Cowichan region, in embracing the opportunity to realize common goals and service efficiencies, is among the first to explore the potential to not only streamline service delivery, but also to create a different visitor experience which will have far reaching impact for the entire region.

The process began with initial research based on the assessment of current activities for marketing, and visitor services in each community. One on one interviews were held in Lake Cowichan, Shawnigan Lake, South Cowichan, Duncan, Ladysmith, and Chemainus as well as by telephone. Research was completed on initiatives in other regions of the province, Canada, and internationally. Community meetings were held in South Cowichan, Lake Cowichan, Ladysmith, Chemainus, and Duncan. These meetings provided an opportunity to get input from the business community across the region.

Project Objectives

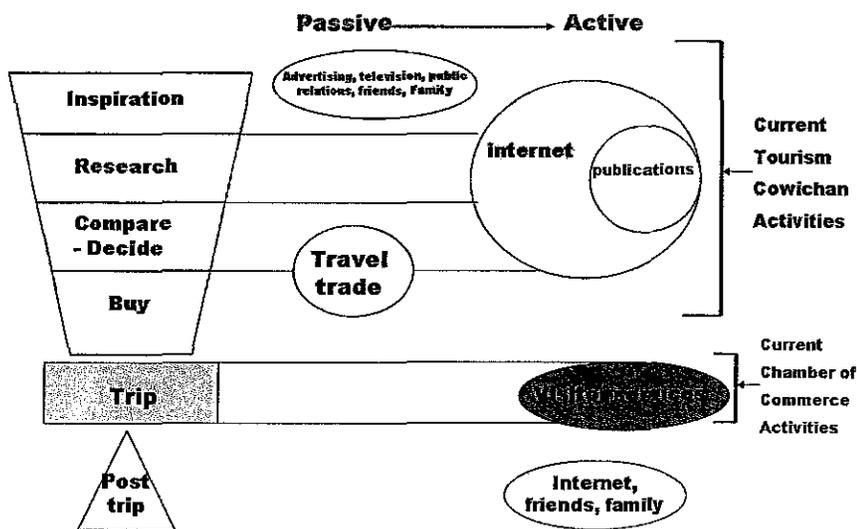
The purpose of this project is to complete an analysis of options for improving the delivery of visitor information services in the Cowichan Area. As a part of this analysis the study will also identify and evaluate opportunities to improve coordination and collaboration of tourism development activities in the Cowichan. The two main areas that this report will provide options and recommendations are: **(1) visitor services coordination and development; and (2) tourism development options**

The goal of coordinating and enhancing visitor services stems from the need to link any work done in destination marketing to the experience a visitor has once they arrive in the region and from the internal pressures of funding and staff limitations for local visitor centres.

Things look better from here. 

External marketing and promotions should be reflected in all visitor services and one of the best ways to impact on repeat and future visit decisions is based on the experience the visitor has once they are on their trip. Since the primary target market for the Cowichan is other BC residents, there is a likelihood that visitors will promote (or not) the region when they return home based on their experience while traveling. It is critical that any destination marketing messages promoted be reflected in the local services, that there is matching information available and that the visitor's experience is seamless from the start of planning through to their return home.

Travel Planning Behaviour



As identified in the Tourism Cowichan Situation Analysis, the region has few anchor attractions which independently can motivate a visit to the area. The primary attractions are golf, Chemainus murals and theatre, wine / culinary, and outdoor activities. It was also shown that visitors who do outdoor activities also participate in a variety of arts, culture, wine / culinary tours, and heritage activities while on their trip. The Cowichan must market itself as a package of activities, and this must be done collaboratively since, for the most part, each community independently does not have enough attractions to be a destination motivator or encourage longer stays. With the proximity of communities the region as a whole provides a large variety of experiences which can be seen to encourage destination trip planning.

The key to creating the seamless experience from planning to post trip for visitors is to coordinate destination marketing programs with visitor services and industry development.

This strategy and recommendations report will outline options for visitor services, and tourism development. Further, this report will recommend one option, and provide timelines and budget for implementation.

Things look better from here.



Conclusions and Implications from Situation Analysis

In a globally competitive market with a sophisticated clientele, the Cowichan region has developed a cohesive image and brand to attract the attention of visitors. Throughout the region each organization and community have independently taken many steps to develop infrastructure and marketing opportunities, the fragmentation of these efforts and the overall lack of dedicated resources create obstacles to realizing the full potential of the industry. The region has come to the next stage in developing collaborative partnerships. In order to create a seamless experience for visitors, the marketing message must be backed up by the message received by visitors in the communities during their visit. The various organizations are recognizing the duplication of services and activities in each area, and are interested in exploring options to new methods to deliver their professional quality services. The fact that there have been past attempts to initiate regional collaboration and independent steps to achieve positive goals by different communities should be viewed as accomplishments. The organizations and communities across the Cowichan should be proud of their ability to look beyond their internal operational needs and expand their range of vision to a new type of collaboration which has not been explored before anywhere in the province. **The important issue is to give equal opportunity to provide excellent service across the region.**

The following conclusions are the result of this situation analysis and provide key insights that will identify the direction for recommendations for service and industry development.

- 1. Being located along two highway routes, the Cowichan region is well placed to capture larger numbers of visitors by using its location on the highways to its advantage. In addition, the proximity to both Nanaimo and Victoria, key entry points to the Island, provide more opportunities to attract an increased number of visitors with a targeted campaign.**

Visitors to the Cowichan region are largely from B.C. and travel by vehicle. These visitors are most likely to be stopovers, day trips, or staying one night.

Visitors Centres should be upgraded and more visible to attract visitors to stop and enquire about the area. A site that is easily visible, accessible and perhaps a destination attraction could create a significant impact on highway travelers given the distance between locations in this rural area. Particular advantage should be taken in areas which may see different visitors who may not travel of Highway 1 into the core of the region such as Lake Cowichan or Shawnigan Lake or Chemainus. **Providing regional emphasis information at gateway locations could result in more visitor traffic in every community.**

There is a lack of developed anchor attractions for the area to be a destination motivator except for the existing destination locations such as Chemainus, golfing, wineries and the lakes. It is critical that activities which complement the trip motivators be marketed appropriately to benefit the region as a whole.

- 2. Tourism Cowichan has created a recognizable brand and developed marketing campaigns which are seeing results. The regional marketing message has been developed through a collaborative effort. There is little visibility of the marketing message in the regional services so the visitor experience is disjointed.**

The overall response through interviews and community meetings was very complimentary on the work done in the marketing program. There is support for the Cowichan brand and the regional program and interest in further development. This disconnection has been due to the limited funding to encourage branding at the local level and the limited ability for the region to support the uptake of the brand and messaging in the various communities.

Things look better from here.



In reviewing on the ground services, there is a lack of cohesion with the regional message. If the visitor is receiving images, and information prior to arriving in the Cowichan, it is important that these be reflected in the experience of the visitor once they have arrived in the community.

- 3. While the primary targets for visitors have been outdoor adventure – land and water based – there will be a need to address the demographic shift to soft adventure and other experiences. Developing the heritage, arts and cultural products of the region in order to meet the changing needs of the traveling public will be important to the Cowichan in maintaining its unique attributes.**

As noted before, one of the Cowichan region's main destination attractions is the outdoor adventure opportunities it offers. With the changing demographics of the traveling public, a larger emphasis must be placed on the attractions which complement the outdoor activities such as wine / culinary, heritage, arts, and culture. Statistics show that the aging of the consumers, and the desire for access to multiple experiences on a trip, support the shift in emphasis to more culturally driven products. The destination sell will be more compelling with a broader offering of things for visitors to do in the area. The marketing program has already started to feature the wine/culinary products of the region. Building on this marketing campaign will be a critical part of the development for the region.

- 4. Visitor services across the region provide almost identical services in each location. With insufficient funding (most centres must do annual fundraising activities) and low staff levels some of the administrative burden of the services could be regionalized.**

With five centres offering similar services with differing budgets, staff levels, and space, there are opportunities for sharing administration which may provide a more equal service being offered across the region. Generally in smaller centres, the administrative burden of managing a visitor centre consumes much of the Chamber manager's time. Coordinating administrative functions will not only streamline the delivery of the service, but also will assist each Chamber to be able to focus some of their limited resources on other activities.

- 5. Interviews and community meetings across the region showed support for the development of a regional visitor service function which creates a network of visitor centres, provides planning and development, and which includes the marketing function.**

While there was concern for exactly how the regional function might operate, and the desire for each community to maintain their own unique identities, there was an overall agreement that some form of regional function will benefit the tourism industry on the whole. The majority felt that this function should, at least for the first few years, be housed under the Economic Development Commission.

- 6. Evaluation tools and metrics must be built into the program wherever possible.**

Evaluation tools will provide the community and local government with a solid report on the effectiveness of the program. This will assist in future decisions on whether an activity should be continued, expanded, or eliminated as a part of the annual planning process. This will also provide the network members with information on the progress of the program – a report card – and a measurement which can allow them to make decisions about their participation.

Things look better from here.



OPTIONS FOR VISITOR SERVICES

This section will review three possible options for the enhancement and development of visitor services across the Cowichan region. Each option model will outline advantages, disadvantages, administration and funding implications, implementation requirements, and constraints on the model.

A part of the decision to review visitor services was initiated by observations from an organization involved in visitor services which noted many similarities and duplication between centres. Each centre in the region has constraints on funding and support, therefore the idea that some form of collaboration or coordination between centres could benefit each organization involved by decreasing administrative and volunteer burden is logical and makes sense. Other than in large city centres where one organization runs all the visitor services, there is currently no model in the Province for a different method of coordinating activities between different communities with different organizations. The Cowichan region, in embracing the opportunity to realize common goals and service efficiencies, is among the first to explore the potential to not only streamline service delivery, but also to create a different visitor experience which will have far reaching impact for the entire region.

Option A: Regional Visitor Centre Model

Description

Arising from interviews with community organizations and local government, the vision of one large, attractive, interactive regional visitor centre located visibly on the highway was suggested. Under this model, the one regional centre would act as the main attraction to get people to stop in the region. The Regional centre would be focused only on promoting the region's attractions and not solely on the community where it is located. Staff would be trained on regional attractions, the regional brand would be highly visible along with Tourism B.C. branding, and information / racking would be regionally focused. The regional centre would be the Cowichan Visitor Centre (no community name). With additional resources this centre could serve as an information distribution centre to other visitor centres (VC), provide travel counselor training for other VCs in the area, coordinate region wide business racking, event ticket sales outlet, provide central reservations, develop and market travel packages, and work with tour operators to attract more touring travelers.

In addition to the regional centre, each visitor centre in the region would have regional branding images to provide a similar look in each location, have standardized training, standardized information for distribution (regional), and provide visitors with a common message

The centre could be contracted to a local tourism organization, or Chamber of Commerce, or could be managed by the regional tourism organization itself. Core funding would have to be from the regional area with all communities contributing to the core services to ensure it is truly representative of the region. As the service builds in client volume, Tourism B.C. funding will be incremental up to the maximum contribution of \$20,000.¹ Additional funding can come from commissions on sales, rental use of additional space in the building, and from in kind contributions of land and building from local government.

¹ Tourism B.C. Visitor Centre Network Membership and Criteria Package, 2007

Suggested core staff includes an overall Manager and at least one assistant. These staff would be responsible for visitor services only and have no other job duties relating to the organization's mandate if contracted out. Additional seasonal employees would be required for travel counseling. As visitor volume grows service pressures may require additional dedicated staff for event ticket sales, central reservations, etc.

Administrative Implications

Two options for the operations of the regional centre could be considered:

1. That the centre be managed directly by a regional destination marketing organization as a part of their mandate and services
2. That the centre be contracted to a local tourism organization.

If incorporated into a regional DMO the centre would be the administrative responsibility of the DMO under agreement with the Regional District. In either case, unless the DMO is an arm of the EDC, the administration at local government will need to monitor a contract and ensure the agreement is being met. If the DMO is a part of the EDC, the impact on administration includes annual budgeting, staff supervision, and program monitoring.

At the local visitor centre level there would be some administrative need to collaborate with the regional centre. As the regional centre will assist the local centres in training, information distribution, racking, etc the administration requirements should balance out.

Financial Implications

Since a regional centre as outlined here would not replace any of the existing centres local government funds would still be directed to their local VC. Additional regional core funding would have to be identified and committed for a period of time for this to be successful. A one year funding commitment would not create enough stability to implement this model. The regional centre could act as the community VC which would replace one of the local centres. There would be some cost savings at the local level if the staff at the regional centre provides services and distribution for the local VCs. There would definitely be more effective use of volunteer and staff time at the local visitor centres as most of the locations are understaffed.

This model could potentially be expanded to incorporate one funding pool for all visitor centres and have a central local government source for funding of visitor centres. Local governments would put their contribution into the regional centre which would then contract with and provide funding to the local ones. Individual centres would still also contract with Tourism B.C. for provincial funding.

Implementation Requirements

In order to implement a regional centre there would need to be many agreements developed. The primary issues that would need to be resolved include:

- Agreement between local government bodies to provide core funding for regional centre (capital and operating) for long term of minimum 3-5 years
- Agreement with current visitor centres to work with the regional centre
- Decision as to the location of the centre – gateway location or central

Things look better from here. 

- Identification of a physical location site - a regional centre has to be large enough to contain staff, storage, and office space. Ideally the centre would have interactive displays and act as an attraction for the region. The flow of traffic on the major highway needs to be a consideration in a regional centre's location.
- Policies and procedures would need to be developed for regional work in conjunction with the expectations of the local centres
- Decision as to the model of operation would need to be completed (regional DMO operations or contracted to local Chamber or organization)

Constraints for Regional Centre Model

The following barriers would limit the effectiveness of the Regional Centre Model:

- Resistance at the local level to a perceived regional "takeover"
- Identification of additional funding to support a regional centre
- Agreement over the location of a regional centre (central vs. gateway)
- Cost to build a new building (or retrofit an existing one)
- Geographically difficult to support the entire region through one centre as the location has limited effect on some areas of the region (ie. limited impact on Lake Cowichan from a Chemainus site).

Option B: Visitor Centre Network Model:

Description

Based on research conducted for this project, another option for collaboration and standardization of visitor services is to create a visitor centre network throughout the region. Similar to the Tourism B.C. initiative, a visitor centre network would have local VCs linked through an agreement with the regional DMO or local government to provide similar services and promotions. This is the model in New Zealand as well where they have identified that the regional tourism organization needs to have a strong stake in the visitor services to integrate it with the marketing program. There would be a joint annual plan with the designated VCs within the region to ensure alignment with the regional tourism strategy, appropriate representation as the region's official consumer interface and integration with the provincial programs. A legal contract would be developed to ensure outcomes.

Operational efficiencies could still be implemented as network locations could be contracted as the lead agency for different regional responsibilities ie: travel counselor training, information distribution, business racking, event ticket sales, central reservations, etc. Core funding for this model remains the responsibility of local governments in conjunction with Tourism B.C. where the site meets the requirements. Additional revenues can be achieved through earned revenue, grants, commissions and special projects.

Each visitor centre in the region would have regional branding images to provide a similar look in each location, have standardized training, standardized information for distribution (regional), and provide visitors with a common message. It would be preferable if each community VC clarified its identity within the network for example: the regional brand is aimed at outdoor recreation, then perhaps Chemainus' networked VC is the cultural centre whereas Ladysmith is the heritage

Things look better from here.
centre, etc.



It would be of benefit for the region to place a greater emphasis on gateway locations in this model. These locations are: South Cowichan, Ladysmith, and Lake Cowichan. Lake Cowichan, Duncan and Chemainus see a different type of visitor profile than the other parts of the region due to their attraction to European travelers. The entry point to the region from the west (Lake Cowichan) is a logical location for a seasonal gateway centre. South Cowichan and Ladysmith would be gateways as the majority of traffic follows Highway #1. While Chemainus shows the highest visitor statistics, their location is not conducive to creating a draw from the highway. It would be logical to support these gateways as a key in promotions for regional networks.

In order to create a seamless experience for visitors, efforts should be made to stop visitors as soon as they enter the region in order to promote the variety of experiences to the maximum effect. Unless the region is the destination for a traveler, the likelihood of a person to turn around during their trip to see an attraction they may have missed is low. This does not indicate that there is any less need for the VC locations of Duncan and Chemainus, but rather that some resources be allocated to take advantage of the untapped potential in the three centres described above.

Working the various organizations as a network will also provide the opportunity to identify gaps in services and to provide feedback at the regional level for VC needs. This could lead to different service provision in the future such as park ambassadors, or tour guides.

Staffing levels would remain the same at the local centres. It would be the responsibility of the local centre to ensure they had sufficient staff to comply with the contracted requirements including if they were to take on additional responsibilities such as staff training, etc.

Administrative Implications

The regional government would have to coordinate policies and procedures for the standardization of services and brand / images. Staff would be responsible for developing contracts, and monitoring the outcomes. This may indicate the need for at least part time hours dedicated to the visitor services. The role would include liaison with the centres, monitoring, contract management, and reporting to the Board on activities and finances.

At each of the service centres there would be no increased staffing requirements and no increased job duties unless contracted to provide a regional service such as staff training. Administratively, the centre managers would need to monitor agreements for standardization of services as a part of their regular duties.

Financial Implications

Financial implications at the regional level are to allocate funding to all the VCs to cover the expenses of any contractual agreements. If a common brand is being implemented, then the costs of signs and any branding must be covered by contracts. The region would also have to allocate staff resources to the program and this would be reflected in human resource budgets. The requirements on local VCs cannot be increased without appropriate financial support.

Initial capital resources would need to be secured to assist in the gateway development vision.

Things look better from here.



At the local visitor centres, there should not be significant financial burden as the job duties at each location have not changed except for contract management and liaison. The main shift in this model is a change in marketing perspective and information content with regards to the standardization of services.

Implementation Requirements

For the Visitor Centre Network Model to be implemented there would need to be agreements developed which address a variety of issues including:

- Agreement across the region for participation in the model
- Development of the body to monitor model and set policies and procedures
- Development of the standards for training, information, brand, and image
- Access funding for both capital developments, and operational needs to support model for long term (3-5 years)
- Creation and monitoring of service agreements with local visitor centres

Constraints for Visitor Centre Network Model

Some constraints for this model are listed below:

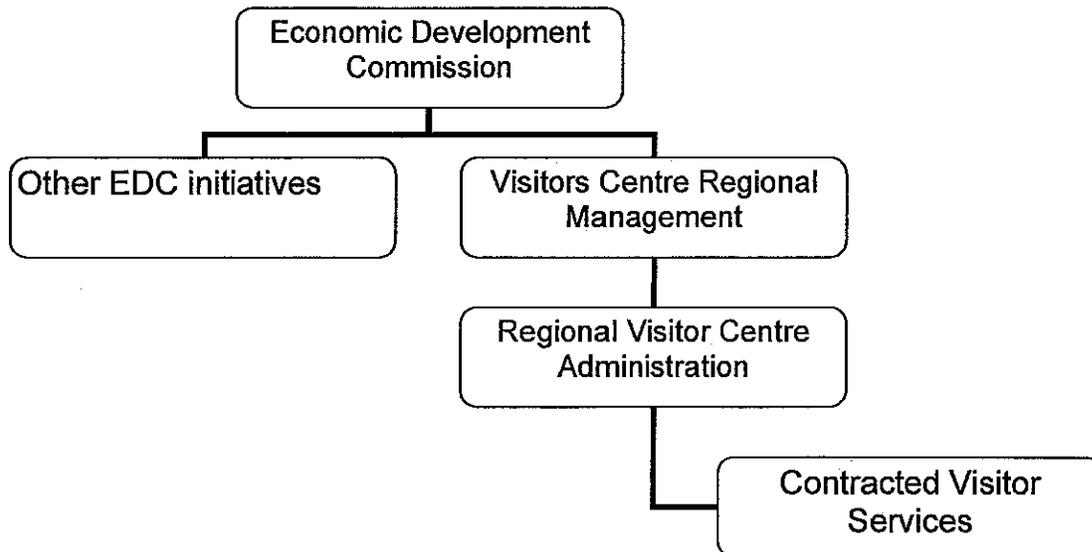
- Resistance from existing locations to more visitor centres which, while increasing the overall benefit to the communities and businesses, could lower the number of visitors at each visitor centre location individually which impacts on funding formulas
- Resistance at the local level to regional branding
- Identification of additional funding to support gateways, brand development, and regional staff
- Cost to build a new building (or retrofit an existing one) for gateways

Option C: Visitor Centre Regional Management Model:

As a part of the development of a regional destination marketing organization or arm of the Regional District, the new regional tourism organization (RTO) could take over direct management and control of all visitor centres in the region. In this model one large centre could become the physical location for the RTO and take over all visitors services. The visitor centres would be directly managed by, and report to the RTO. The RTO would determine staffing, funding, and locations for visitor services across the region. The RTO would contract with Tourism B.C. and distribute budgets according to annual strategic plans.

Operational efficiencies would arise from the coordination of a number of administration duties through one office. Staff in the VC locations could focus on responding to visitor needs rather than a number of other duties such as training, information sourcing, distribution and ordering of publications, business racking, web site development, marketing, etc. This regional model would be strictly administrative with locations operating separately from the administration. There is the potential for the RTO to contract back the service to a local organization, but all tourism funding, policies, and procedures would be channeled through the RTO.

**Visitor Centre Regional Management Model
Suggested Organization Chart**



This model focuses more on the coordination of administration functions and less on specific locations. As a part of the RTO's annual planning, locations for VCs would be determined and modified based on the evaluation of targets.

Administrative Implications

This model is entirely based on the development of a single administrative body to oversee and manage local visitor services. The impact for the Regional Government is that this would mean the creation of a new department, or governing body responsible for the administration of these services. Staff would need to be hired to fulfill the management of the services and it would mean a minimum of two staff.

From the perspective of the local visitor centres being managed by local organizations the implications are that the services would be moved from their control to a regional body. If the local group is then contracted by the RTO to provide a VC, then the organization would only be responsible for the day to day operations and serving the consumer.

Financial Implications

Financial considerations for this model would be on the development of a new regional body / arm of government which then would need to be funded for staff, office resources, and operational costs. It is unknown if Tourism B.C. would reevaluate their contracts with existing service providers to direct the funding to the RTO. As the RTO would be providing visitor services, and would be able to provide statistical information on the numbers of visitors serviced, it would be anticipated that Tourism B.C. would fund the RTO.

Things look better from here.



Existing contributions from local governments should be redirected to support the regional efforts. Please note that the regional body would then fund the local services so that funding is ultimately not lost at any local level.

Financial implications for existing visitor centres is that they would lose their local government funding and Tourism B.C. funding, but it would be replaced by contracting with the RTO.

Implementation Requirements

To successfully implement the Visitor Centre Regional Management Model, a number of steps identified below must be considered:

- Agreement must be in place between communities and tourism organizations to turn over contracts, funding, and responsibilities to a regional body
- 3 – 5 year funding commitment must be sourced to provide resources for administrative body
- Creation of service policies, procedures, and operational program
- Creation of service delivery model within regional group
- Development of contracting agreements as needed
- Hiring of staff and development of amalgamation processes and determination of transfer of service process
- Coordination and agreements to be developed with Tourism B.C.

Constraints for the Visitor Centre Regional Management Model

The following commentary outlines the potential barriers to this model of service:

- Fear of loss of services in local communities
- Fear of loss of funding for local organizations which rely on their visitor service contract funding to support their overall budgets
- Resistance to the "take over" by the region from the local communities
- Possible lack of regional resources to put administrative service in place
- Uncertainty as to the reaction of Tourism B.C. to changes in services

Things look better from here.



Comparison Chart of Visitor Service Models:

The chart below provides a comparison of these three services models with a listing of advantages and disadvantages for each.

| Model | Advantages | Disadvantages |
|--|---|---|
| <p>Regional Visitor Centre</p> | <ul style="list-style-type: none"> • Large attractive centre would “pull” people off the highway and increase the numbers of visitors in the area • Regional promotion focus would benefit all communities and businesses • Direct management by the RTO/DMO would ensure equal representation of the region • Reduction in administrative duties at local VC as regional could provide some support • Reduction in duplication among local VC for service needs if coordinated regionally • More effective use of staff and volunteer time at local centres • Becomes a source for information for all visitor centres about the region’s attractions | <ul style="list-style-type: none"> • Resistance at local level of perceived “take over” by region • Need to identify new resources for capital and operating costs • Geographically difficult for one location to support the entire region as the location has limited impact on the farthest opposite site • Difficulty in determining agreement on the optimal site for one large centre • Need to develop administrative supports • Need agreement from local governments, tourism organizations, and businesses • Uncertainty on relationship with Tourism B.C. and the further impact on local visitor centres |
| <p>Visitor Centre Network</p> | <ul style="list-style-type: none"> • No danger of loss of funding for local visitor centres • Small increase in responsibility at local visitor centres • Gateways would attract more visitors who may choose to do activities in the area before they have passed through thereby increasing the overall number of visitors • Standardized look and information throughout region provides continual cross promotions for all communities • Provides best use of existing resources: buildings, and staff • Potential for operational efficiencies and reduction in duplication of administrative duties • Collaborative network will easily identify gaps in services and provide feedback to appropriate bodies | <ul style="list-style-type: none"> • Potential drop in numbers at some VC locations, but overall increase in visitors in region • Need to identify funding resources to upgrade / create gateway locations, and staff • Need agreement from local governments, and tourism organizations |
| <p>Visitor Centre Regional Management</p> | <ul style="list-style-type: none"> • Administrative component only – no need for physical location • Reduction in duplication of work at local visitor centres • Operational efficiencies for local visitor centres • Pooled funding could be allocated according to regional needs • Potential for increased funding from Tourism B.C. as current visitor numbers are not individually high enough to receive the maximum amount of funding from Tourism B.C. | <ul style="list-style-type: none"> • Loss of control of services at the local level • Loss of funding directly to local visitor centres • Requires regional resources to create the administrative service • Uncertainty on how Tourism B.C. will work with a regional group |

Things look better from here.



OPTIONS FOR COORDINATION OF TOURISM DEVELOPMENT

Tourism is an unusual product, in that it exists only as information at the point of sale, and cannot be sampled before the purchase decision is made (WTO Business Council, 1999). In developing the tourism industry to the maximum benefit for all communities and businesses, it is hard to separate the efforts at different levels to impact on visitor planning behaviour. Tourism is a major industry in Canada and serves as a vital component of many economies. Today virtually every major municipality in the country has an organization with a basic mandate to promote the municipality or region as a tourism destination. Typically these organizations are called destination marketing organizations or DMO.

These organizations bear responsibility to act as a linking pin between the supply and demand in the tourism economic equation. They are a conduit between the community tourism assets and the demand elements of the market. The tools used are largely information and communication and the process is marketing. The DMO can also serve as a coordination / collaboration mechanism working with stakeholders and suppliers of tourism assets, specifically public and private interests as well as the citizens of a community, to help develop an appealing and reliable tourism product. For example the New Zealand model authorizes regional tourism organizations or RTOs with more responsibility than just marketing and promotions.

There are a variety of components which a potential regional DMO could provide including the externally focused marketing and sales, as well as support for the internal or supply side of strategy formulation and product development. The external / demand side focus includes activities aimed at attracting visitors to the destination. Common activities include: attending trade shows, familiarization tours for media, tour operators, and meeting planners, publications advertising, multi-media advertising campaigns, web site development, etc. As DMOs grow in size and sophistication they begin to focus on the tourism product offering and seek to improve the quality of the supply side including attractions. The associated functions become part of the DMO's mandate as the organization matures and is able to bring a greater level of sophistication and expanded skill set to the community. These functions are largely strategy formulation and product development.

This section of the report will look at three possible options for coordinating tourism development across the Cowichan.

Option 1: Independent Community Based DMOs

In this model each community would be responsible for marketing their own area through current administration or contracting to an organization or person. The region linkage would come from networking at the government or staff level to share information and discuss gaps and opportunities. In this model it would be best for the community to focus on marketing primarily and as communities proceed there will be infrastructure and product needs brought to their attention. City Council and the administrative staff at each location would be responsible for developing strategic plans, monitoring the service, and setting funding. In rural areas the regional district could contract services for marketing and promotions. Responsibility for facilitating or providing business development support for industry and product development would also lay with the local Council, Directors or staff.

Things look better from here.



Administration Implications

The independent community model requires that there be administrative responsibility at each community for planning, monitoring, and contracting. This requires administrative efforts in each location which include increased staff duties and funding. Staff or Council will also be responsible for being knowledgeable about tourism marketing to take the best advantage of programs and opportunities. Resources would need to be in place to provide industry development and support, at the least the resources to deal with enquiries and referrals to other business development organizations.

Financial Implications

As each community is acting independently finances to support a marketing program must be provided. According to marketing sources, a minimum dedicated budget of \$150,000 is required to have any impact. Since tourism marketing can be leveraged through the Tourism Association Vancouver Island, Community Tourism Foundations, and Tourism B.C. the minimum budget could be \$50,000.

All marketing efforts require a call to action – an email or phone contact. There would need to be a resource which deals with these enquiries if there is no visitor service in the community which also has budget implications. Currently, in most communities, there are minimal budgets for marketing.

Financial commitments would also need to be in place to support education, planning, product and industry development activities.

Implementation Requirements

For some parts of the region, specifically the municipalities, there are few needs for implementation. At the regional level these requirements would be the responsibility of the Regional District. Some requirements are:

- Creation of a local strategy for tourism development
- Allocation of sufficient funding resources to have impact on markets
- Education of staff, council, directors, etc. on tourism marketing, industry supports and product development
- Possible need for a volunteer committee to oversee programs as staff and/or council may not be able to provide resources
- Need to identify contractors able to provide services at expected quality
- Need to establish administrative processes and procedures to handle new responsibilities.

Implementation Constraints

The most challenging issue facing the development of tourism as independent communities is the overall lack of resources to dedicate to the program both financial and human. The second greatest constraint is the need to develop the knowledge and skill base to be successful as a DMO. Since this requires time, even with hiring a skilled contractor, the ultimate success of the program will be delayed as the community follows the learning curve.

Things look better from here.



Option 2: Regional Destination Marketing Organization

Tourism can be increased by sustained, well targeted, and professional pro-active marketing efforts. Within a group of small communities whose resources are limited, there is a natural opportunity to pool resources to achieve more for the development of tourism. As noted earlier in this report, collaboration at this level can take different forms. In this model, it is suggested that a regional level DMO be formally created as an arm of the regional government. Prior to the creation of Tourism Cowichan in 2003, collaborations were attempted in the past, but without stable and secure resources they have not been able to be as successful as this model. A direct relationship to regional government provides a secure environment with physical and financial resources. A DMO must have industry representation at the leadership of the group but it is important to be independent of organizations which may have other responsibilities that can distract the resources from the intent of the program.

This organization has one mandate: marketing the region. This would include such activities as: creating a brand and image, attending trade shows, creating publications on regional attractions, purchasing advertising space in other publications, working with media, multi-media promotions campaigns, and web development. There would be little or no overlap with the operations of the visitor centres in the area outside of taking over the marketing responsibilities. Any development issues that come up through the process of marketing are referred to the appropriate local government or other service. This is the current Tourism Cowichan model.

Administrative Implications

The full responsibility for administration will belong to the regional government. The Regional Board would designate the tourism organization and appoint the committee. The work load for staff would be in supporting the Committee and doing the work of the DMO. This would indicate one $\frac{3}{4}$ or full time position. This is the model currently in place and Tourism Cowichan has been operating with one $\frac{1}{2}$ time marketing coordinator and has found it could easily be increased.

There would not be any additional administrative implications once the organization is set up and develops a reporting system to the Board of Directors.

Financial Implications

The Regional District Board would need to allocate the appropriate finances to hire staff and provide marketing and operational funding for a committed term. It would be anticipated that the local municipalities provide support for the core funding through their annual regional government taxes. Marketing funding can be leveraged with local businesses and provincial tourism organizations to maximize the buying power of the core funding allocations (as is now done). Other funding sources could include fees for services as projects are undertaken. A suggested minimum budget could be \$150,000 including staff wages. Current budget for Tourism Cowichan is approximately \$120,000.

Implementation Requirements:

For the successful implementation of a regional DMO, the following steps would need to be taken:

- Agreement and motion taken at the Regional District Board to fund this organization
- Organization structure, plans and goals developed along with a clear relationship to the Regional Board
- Staff will need to be hired or contracted

Things look better from here. 

- An industry Committee will need to be developed.
- Branding will need to be created
- Marketing program initiated.

Constraints on Implementation

The following constraints could impact or restrict implementation of a destination marketing organization:

- Lack of agreement to proceed with regional brand and program
- Lack of resources to provide appropriate core funding.

Option 3: Regional Tourism Organization

Returning to the supply and demand model, the proposition here is that the regional tourism organization (RTO) be organized into two significant focus areas or functions. First, ***the external / demand side*** function which is the typical vision of a RTO. This is further segmented into:

- a) Awareness and marketing concerning activities initiated by the RTO to build awareness and generally get potential visitors to visit; and
- b) Connecting and sales concerning those activities designated where direct contact is made between the RTO and potential or existing visitors.

This includes making sales calls to the trade or operating a visitor centre.

Second, the ***internal / supply side*** development function which is those functions that have tended to be less prominent initially but which are a critical part of the development function. This segment focuses on tourism product offerings, and seeks to improve the quality of the supply system including attractions. This segment can also be broken down into two main functions:

- a) Strategy formulation concerning the definition of the community's value proposition, the development of the branding statement, and the related marketing strategy development and information management work that supports strategy development;
- b) Product and system development which concerns improving the product offering provided by the community. This may include providing advice on attraction development and seeking improvements to the quality of products, providing advice on other areas with a potential tourism impact, and providing promotion or advocacy for asset development proposals.

The RTO would be responsible for all aspects of the tourism program for the region from planning and product development through to the delivery of services on the ground in the various communities through visitor centres. The RTO should be housed under the Regional District government through a model such as a Committee or Commission. The Board must include all partners in the region such as Chambers of Commerce who operate the VCs, and business representatives. Visitor centres need not be directly managed by the RTO but must have standing agreements to ensure alignment with the regional tourism strategy which may be contracted agreements. The RTO by its nature must work closely with economic development and local governments to assist in product development.

An RTO would need sufficient funding to provide at least 3-5 years of programming in order to set up and be able to demonstrate the impact of the program. A staff complement of two people should be considered – one for a marketing focus and one for product development / strategy programming / visitors services. The New Zealand model suggests a minimum of 3.5 – 4 staff depending on the size of the community.

In New Zealand every community is required to have an RTO and if they do not do the services directly, they are required to have an agreement with an agency to perform the function on their behalf.

Administrative Implications

Again, the full impact of this model for administration will be the responsibility of the regional government. The Board would have to designate the tourism organization and appoint the committee or commission. The EDC would be responsible for hiring staff and developing the relationship to the Board. Once in place, the administrative responsibilities would decrease to monitoring and budgeting supports for the RTO.

Financial Implications

As with the previous model, the financial needs of the organization must be met with stable core funding from the local governments and regional government. Marketing funding can be leveraged with local businesses and provincial tourism organizations to maximize the buying power of the core funding allocations. Other funding sources could include fees for services as projects are undertaken. A suggested minimum budget would be \$200,000 including staff wages with additional funds for visitors services contract requirements. This budget is higher than the DMO model due to the higher number of staff required for all segments of product development and marketing.

Implementation Requirements

Successful implementation for this model would include the following is in place:

- Firm agreement across the region to adequately fund and support this model
- Board decision on type of organization – Committee, authority, non-profit
- Hiring of staff for organizational development
- Develop Board for RTO
- Development of policies and procedures for organization
- Development of organizational strategic plan
- Implementation of strategic plan – brand, marketing, etc.
- Development of agreements with visitor centres for alignment with program.

Implementation Constraints

Constraints for implementation of the model are:

- Lack of agreement to proceed with regional brand and program
- Lack of resources to provide appropriate core funding.

Things look better from here.



Advantages and Disadvantages of Development Models

| Model | Advantages | Disadvantages |
|--|--|---|
| Independent communities | <ul style="list-style-type: none"> • Community identity and products are the focus of promotions • Easy to identify the needs for product development in each community | <ul style="list-style-type: none"> • Not every community has the resources to create a local tourism program • Councils, Directors, and staff must become tourism experts to manage program • Large administrative burden to develop new department of government bodies in each community • Due to limited budgets, effectiveness of programs is also limited as marketing requires large commitments • Contracting to local organizations does not guarantee tourism focus as organizations have other programs • No guarantee that there are sufficient skills locally to do program |
| Regional Destination Marketing Organization | <ul style="list-style-type: none"> • Pools funding resources and talent to maximize impact of marketing efforts • Creates a regional brand that can become recognized through aggressive marketing campaigns • Reduces duplication of efforts which currently take place in each community • Creates one organization which hires an experienced staff person thereby reducing need for everyone to be an "expert" • Less administrative burden as only one body is created for the region • Able to leverage maximum funding through provincial programs and business buy in | <ul style="list-style-type: none"> • No linkage to visitor centres so the marketing message is not necessarily followed up on the ground during the visitor's experience • Organization has no mandate to support product development • Requires regional buy in commitment from volunteer organizations, local governments and directors • Local governments must still manage industry development needs • Dilution of individual communities' identity in external marketing in favor of regional image |
| Regional Tourism Organization | <ul style="list-style-type: none"> • Pools funding and talent resources to maximize impact of marketing and industry development • Maximizing impact increases overall number of visitors to region • Provides a seamless experience for visitors from planning and development to marketing and attraction through visitor services • Reduces duplication of efforts which take place in each community • Creates single focus organization whose mandate is tourism excellence • Able to leverage maximum funding through provincial programs and business buy in • Less administrative burden on each community by developing one regional body • Linkage to visitor centres ensures alignment with the regional tourism strategy | <ul style="list-style-type: none"> • Dilution of individual communities' identity in external marketing in favor of regional image • Requires regional commitment from local governments |

Things look better from here.



RECOMMENDED MODEL: NEW TOURISM COWICHAN

RECOMMENDATION #1:

CREATION OF EXPANDED MODEL FOR SERVICE DELIVERY AND INDUSTRY DEVELOPMENT

In performing the review of local visitor services, and through interviews and community meetings held throughout the region, it becomes clear that the tourism industry in the Cowichan is still evolving. Tourism Cowichan marketing programs have been successful and individual visitor centres have also had their own individual successes. Despite these efforts, there has been no clearly coordinated connection between Tourism Cowichan marketing, industry product development, and localized visitor services. While there has been regional planning, implementation of these plans has been limited by resources. Often individual communities have competed for limited resources, and an overall reliance on fund raising initiatives alone does not provide a structured focus to achieve results. What core funding has been allocated has been in most cases, insufficient to cover service delivery to meet the standards of the industry across the province.

In describing the models for service delivery and tourism development above, it becomes clear that there is no value in changing a visitor service delivery system without including destination marketing and industry development. There is no purpose in changing visitor services delivery if there is no regional message. It is impossible to isolate the marketing message from the service provided to visitors on the ground. Tourism Cowichan has created the brand and messaging, it is the next logical step to incorporate these into the local delivery of services and information.

Based on detailed interviews with visitor centre operators, business owners, and other tourism organizations there has been a very positive response to the vision of a regional service with different functions. There is a sense that the best opportunity for growth is to be working with a larger group which has stability and has a strong link to economic development and land use planning.

All the scenarios listed above require commitment to funding and administration. If a plan is to actually achieve implementation, it must be supported by core funding. With the current commitment at the provincial level for funding, and the challenge to double visitor volume by 2015 the Cowichan is able to take advantage of current trends to benefit regional initiatives.

While there are many ways to mix and match the models outlined above, and a variety of alternatives for funding, the model recommended below blends the development of a new regional tourism organization, named Tourism Cowichan, with a centralized location coordinating the visitor service network. These models indicate the most likelihood of success based on the evaluations above and the input from the local communities.

The new Tourism Cowichan's primary role is to grow visitor expenditures in the region, to provide sustainable economic, environmental, social, and cultural wealth opportunities to the local communities. New Tourism Cowichan will achieve this through: generic branding and promotion of the region to attract visitors; advocating for and facilitating destination management planning; managing regional visitor services; and facilitating or providing business development support for industry and product development. The regional tourism organization will be a stakeholder membership model which will represent the entire tourism/business sector and which provides the definition of services, sets standards, policies and regulations, and would have three main functions: (1) marketing, (2) planning and product development, and (3) visitor services.

Things look better from here.



Funding for the new Tourism Cowichan must be provided at a base core level from the regional government. How the regional government provides these funds will need to be determined. A hotel tax is the most successful in other areas of the province, often providing a larger source of funds than expected. In the Cowichan there would be some inequities as there are a limited number of motels / hotels versus the large number of bed and breakfast properties. There has been some discussion at the provincial level of imposing this tax across the province to equalize access to marketing funds for every region.

It is important to note that Tourism Cowichan already provides cooperative regional marketing, the brand is in place, and many product development initiatives have already started. This model solidifies the work of the present committee and Tourism Cowichan in a formal manner and introduces the additional responsibility for the visitor services network.

Outline of the Four Overarching Functions of Tourism Cowichan:

| | | |
|--------------------------------------|--|---|
| Internal/ Supply Side | 1. Strategy Formation | <ul style="list-style-type: none"> • Develop a 3-5 year strategic plan for the RTO relating to activities the organization is responsible for and tied to a minimum of 3 years funding. • Ensure strategy is in line with provincial strategies. This would include community consultation, infrastructure, transport, business capacity development, etc. • Develop and manage regional destination branding for markets. • Assessing attractions and assets and product inventories. • Research and information management to understand market demands, industry supply, and linkages that need to be made to maximize market impact. Tracking and measuring evaluation tools for RTO programs. Measure and track market trends and local impacts. • Develop standards for visitor centres with regard to alignment with regional strategy |
| | 2. Product and System Development | <ul style="list-style-type: none"> • Acting through the visitor service network, ensure the standards of training for employees of visitor centres • Develop and implement service agreements with visitor centres • Product and asset development concerning activities that entail making physical changes to the attractions the community has to offer. This is typically providing advice and feedback to suppliers of tourism products, usually based on research. • Reviewing and renewing the infrastructure in place designed to support and promote tourism. This includes liaison with local governments on plans or existing attractions. • Maintain and distribute relevant regional tourism statistics and tourism business development publications • Develop new itinerary and package concepts for the trade and visitor network which contribute to strategic objectives such as addressing seasonality • Coordinate tourism specific business development assistance services with existing business organizations such as FutureCorp |

Things look better from here.



| | | |
|--------------------------------------|--|--|
| External/ Demand Side | 3. Awareness/ Marketing | <ul style="list-style-type: none"> • Advertising for the regional program involving various media • Procure, store and distribute high quality images and video footage • Maintain a comprehensive web site with a primary tourism focus • Implement marketing initiatives ensuring consumer response mechanisms are in place • Partner with TAVI, Tourism Victoria, Tourism Nanaimo, and Tourism B.C. initiatives in print, radio, and television media • Participate and coordinate in media and public relations opportunities including familiarization tours • Publication of regional information: travel planner, trails guide, and regional maps, etc. • Work with local Chambers to ensure branding on internal marketing collateral • Festivals and events are emerging as a primary tourism destination focus. Marketing assistance to local events is an important contributor to the overall campaign |
| | 4. Connecting / Sales | <ul style="list-style-type: none"> • Direct sales to business and other organizational events – conventions and meetings as facilities are available. • Tour trade sales – direct sales contact with tour operators to encourage stops in the region • Trade show representation can be very effective in providing exposure to tourism suppliers and consumers • Potential to develop a call centre to handle reservations, ticket sales, package development, and information inquiries • Develop a joint annual plan with designated visitor network centres to ensure alignment with the regional tourism strategy • Maintain a legal contract with the designated visitor network centres including fees for any increased costs related to contract • Support the capital costs to develop gateway centres • Ensure contract with an organization to provide: publication coordination and distribution; event calendar development; and staff training, and other joint functions as defined in annual planning for network |

Physical Location

While there has been differing opinions on the location(s) for a regional centre or gateway, every person involved with this study supports the vision of a visible, accessible, attractive visitor centre(s) which will assist the region in drawing more visitors into the area. At this time, the recommendation is to network existing centres and support their development through joint planning at the regional level which may support access to funding as well.

Most of the interviewees feel that an attractive visitor centre could act as a destination in itself which can create more reasons for visitors to stop. There is a strong interest in a physical hub, but most locations want to continue to provide localized services as well. All organizations and businesses are supportive of the Duncan - Cowichan Chamber of Commerce's efforts for a new location and agree that this could have a positive impact on the region. Most organizations agree that a gateway site can be important, but there is also recognition for the importance of local sites and the expertise that is inherent at each location. The recommendation for a regional tourism organization includes the development of a regional network for visitor services which celebrates each areas attractions, rather than one central physical structure. This does not preclude the future development of a regional centre if the joint planning process supports this initiative over time.

Things look better from here.



The recommendation for the new model of Tourism Cowichan includes the need for additional staffing and the coordination of administrative functions for visitor services across the region. Staff will need office space, and a contract with an existing visitor service operator for regional administration may be required. It is the suggestion of this report that Tourism Cowichan staff be co-located in a facility which is also a visitor service location. As the Duncan-Cowichan Chamber is in the process of relocating, an opportunity to co-locate the Tourism Cowichan services in the new visitor centre should be considered. Duncan is a central point for all the visitor centres and would be a good location for the regional service.

Governance Structure

As a result of the interviews conducted and the feedback from community meetings, the majority of the results indicate that Tourism Cowichan should continue to function under the Economic Development Commission. In fact there was resistance to the creation of any new entity requiring additional volunteer efforts. It will be critical to establish an appropriate implementation group for the recommendations included in this report and to establish a base for overall destination development.

This entity must be capable of not only marketing the Cowichan, but also to be authorized to develop specific destination amenities and community improvement. Tourism Cowichan, operating as an Advisory Committee under the Economic Development Commission, is strategically positioned to provide business and infrastructure development supports. It is critical that the logical linkages between business development and industry be in place to ensure that there is less duplication of work and more likelihood for success as initiatives develop. The recommendations of this report, when enacted, will formalize the current Tourism Cowichan structure while developing new terms of reference, new roles and responsibilities, and create formal relationships with the visitor centres. It is the intent of this report that no new bureaucratic levels are created, but rather the aim is to reorganize the existing process and structure.

The following principles are important objectives:

- The entity responsible for the development and marketing must be capable of operating with a mandate that fulfills public goals
- The group must be able to recruit key personnel responsible for development, financing, and operations
- The group must be accountable to its sponsors (Cowichan Valley Regional District, municipalities) and the industry stakeholders through the Economic Development Commission.

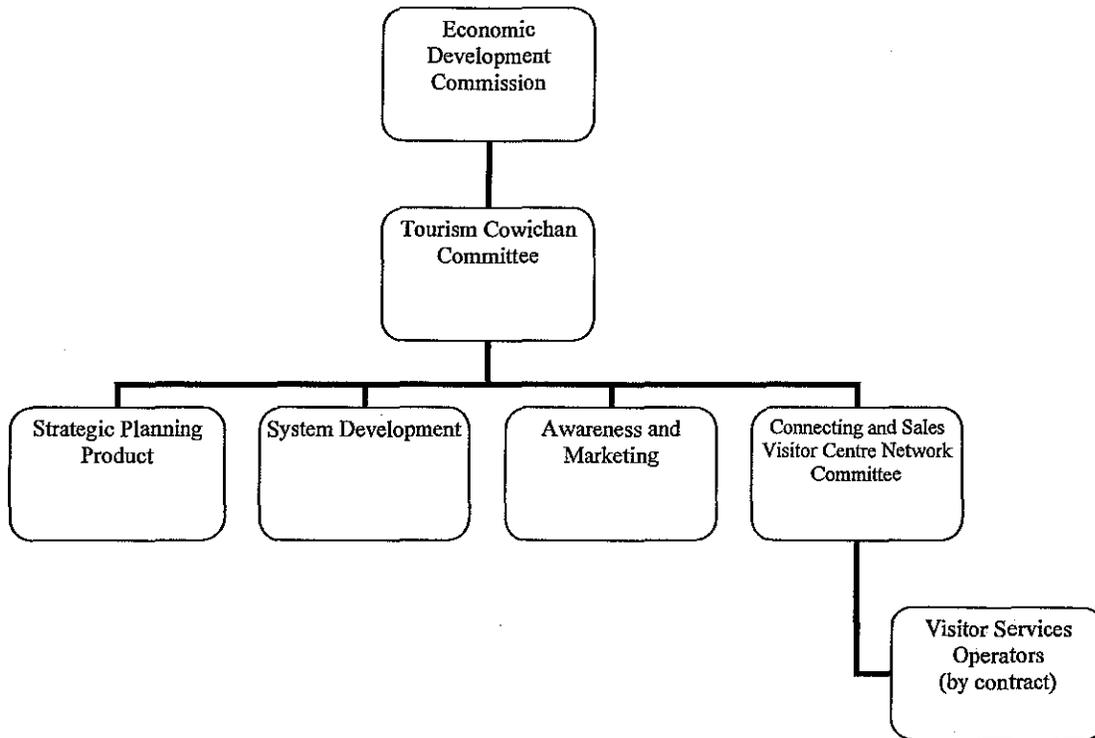
Committee representation should include two stakeholder groups: Visitor Centre Operators, and industry; and representatives from sponsor organizations (CVRD and municipalities). The following list is a suggested Committee for the proposed group:

- Business members of the five Chambers of Commerce in the region(5)
- Representative of the local hotels and bed and breakfast associations (2)
- Representative from First Nations (1)
- Representatives from the key attractions: wine / culinary; golf; arts / theatre (2)
- Others as appropriate.

Staff of the visitor centres may sit in on meetings, but due to the contractual relationships to the tourism group they should not be voting seats. A representative from the Committee should be a member of the Economic Development Commission for accountability and reporting.

Things look better from here. 

The actual operating structure could be similar to the existing model as follows:



This organizational structure would be accountable to the Economic Development Commission. The staff would report to the Economic Development Manager and their specific roles and responsibilities would be identified in the planning done by the Committee once changes are in place.

Preliminary Funding Requirements

In redesigning Tourism Cowichan there will be funding required for various parts of the activities and the assessment of costs here is preliminary. The primary funding elements are as follows:

| | |
|---|----------------|
| Staff Wages | 65,000 |
| Contract Marketing | 30,000 |
| Administrative overhead | 30,000 |
| Marketing | 350,000 |
| Visitor Network Standards Development | 50,000 |
| Visitor Centre improvements capital costs | TBD |
| Total: | 525,000 |

Things look better from here.



| | |
|---------------------------------------|----------------|
| Gov't core funding - EDC | 225,000 |
| Other grants - capital costs | TBD |
| Leveraged funding (TVI, businesses)** | 250,000 |
| Grants | 50,000 |
| Total: | 525,000 |

In terms of long term operating funding, the Committee will likely tap into some of the following principal sources:

1. UBCM funding as available
2. Potential hotel tax revenue
3. Operating revenue from projects and fees paid for services such as advertising, racking, etc.
4. Funding from other government programs and other potential external sources.

**** Leveraged funding** is additional marketing value added to the initial investment by Tourism Cowichan in marketing activities. The value is either funds recovered from businesses who financially participate in marketing projects, and from Tourism Vancouver Island which provides reduced rates or matching funding for marketing projects.

Things look better from here.



INFRASTRUCTURE DEVELOPMENT

An inventory of the tourism sector assets in the Cowichan Region was not a part of this study project. In addition, it is very difficult to identify the specific economic impact of the tourism sector for the region without key statistical information on local room revenues and tourism expenditures. The only information available does not specify the Cowichan Valley region separate from "other Vancouver Island" locations in most of Tourism B.C.'s detailed statistics. Based on interviews, community meetings, and observations of the region, some suggestions for opportunities for enhancement or expansion of the products or services offered are listed below in the following categories:

- ❖ Accommodation
- ❖ Campgrounds and RV parks
- ❖ Transportation services
- ❖ Attractions
- ❖ Arts, cultural and heritage products.

RECOMMENDATION #2:

Complete a detailed analysis of the product inventory in the region, business profiles, employment, and visitor profiles (which include information on the direction of travel) in conjunction with Malaspina University College.

Without region specific information it is difficult not only to determine economic impact models, but also to have a baseline from which to evaluate the impact of marketing campaigns and other development work. Malaspina University College prepared and deployed an extensive survey project with TVI for the Island. Working with the Recreation and Tourism Institute at the College, a full study project should be completed for the Cowichan Region specifically providing a detailed profile of the current industry and a baseline for evaluation.

1. Accommodations:

There are two challenges for the Cowichan in accommodations: there are an unusually large number of bed and breakfast properties; and the hotel / motel segment are largely budget-oriented accommodations geared to the "rubber tire" market. Visitors who seek and frequent the bed and breakfast properties are a specific market – usually higher income visitors who research their destination thoroughly before visiting. The "rubber tire" market is generally not planning the visit as a destination, but is more transient and likely just stopping over in the area.

In comparison with the nearby cities of Nanaimo and Victoria, the Cowichan lacks the hotel and resort accommodation infrastructure that would increase the number of visitors from the higher end leisure market segments requiring accommodation.

Listings on the Chambers of Commerce website total:

- ❖ 54 bed and breakfast properties
- ❖ 21 motels / hotels
- ❖ 13 cabins / cottages

Some of these listings are duplicates as accommodators will often be members of more than one Chamber.

A focus for the attraction of new business ventures could include:

- ❖ Full service hotels / resorts
- ❖ Support for improvements to existing hotels / motels for amenities designed to increase the length of stay
- ❖ Additional ocean front properties.

Things look better from here.



2. Campgrounds and RV Parks:

Due to the large number of visitors throughout Vancouver Island utilizing their vehicles and RVs during their stay, facilitating their travel behaviour is critical to attracting visitors for longer stays. Based on the listing at the B.C. Accommodations guide, there are about 500 sites listed as well as the forest recreation sites (5). There are a number of private campgrounds not listed in the accommodations guide so without a full product inventory the exact number of sites is unknown. Anecdotal information from the communities indicates a need for more campground sites, and in particular the development of RV parks. RV parks are a growing trend and it would be beneficial for the region to ensure sufficient capacity.

3. Transportation services:

While the location of the Cowichan region on two highway routes (Highway #1 and #18) provides an opportunity to draw visitors from their travels, the efficiency of the highway layout, and the overwhelming attractions outside of the region, puts pressure on the area to make extensive efforts to draw travelers off the main arteries. With the main portals to the Island just north and south of the Cowichan region, visitors are often en route to a destination which may already be booked or on their way home as they travel the highway through the Cowichan. To manage to attract people en route the Cowichan needs to focus efforts on external marketing (viewed by visitors before they reach the Island), and on developing a visually attractive visitor centre.

As Victoria and Nanaimo increase their efforts to attract visitors through their portals, the Cowichan would benefit greatly by participating in their marketing efforts. In addition, efforts focused on B.C. Ferries and airline travel magazines will be important. Anecdotal information gathered throughout this project indicates that the flow of traffic is predominantly north bound. Information from the Ministry of Transportation does not support this point of view. It would be important to identify the traffic flow of visitors through the visitor profile study in order to make appropriate decisions on where to target marketing efforts.

Critical infrastructure needs in the area of transportation include:

- ❖ Improved parking in Cowichan Bay and Shawnigan Lake
- ❖ Means to transport water based travelers (transient boaters) into the inland activities which will encourage longer stays
- ❖ Increased public access to Cowichan Lake
- ❖ Improvements to the Trans Canada Trail which is a transportation link for visiting cyclists including the Kinsol Trestle
- ❖ Review options for rail service and ways to link it into other transportation
- ❖ Highway signs program (EDC is currently reviewing options)

4. Attractions:

The Cowichan Region has a few attractions that would be considered at the scale of a destination attraction. Typically these cultural, heritage, interpretive or entertainment attractions are located in a core tourism area where there are other complementary services such as accommodations, retail, and food and beverages. Examples of these types of attractions are the Royal B.C. Museum in Victoria or the Capilano Suspension Bridge in North Vancouver. These items become "must sees" and the area is identified for the attraction.

Chemainus has developed both the murals and the theatre to be major destination attractions. Both, however, are primarily day visits and do not have the longer stay attraction. The Chemainus Theatre Festival has plans to develop a different target market, and other attractions such as a summer outdoor festival. The new development of the Best Western Hotel also provides encouragement for longer stays and they market a package including golf and theatre. Marketing the image has been a key to the success of the attractions.

Other key attractions in the region include: B.C. Forest Discovery Centre, the Qu'wutsun Cultural and Conference Centre, golf facilities (6 in the area), wineries, and outdoor activities. Complementary activities include: heritage, museums, events, and retail boutiques.

Things look better from here.



The development of destination attractions are largely the responsibility of the private sector, but local government can encourage their development, and ensure supporting needs are met such as transportation and public spaces. The Board of Tourism Cowichan should prioritize what attraction will be the most productive to market and support in their annual planning and focus efforts on promotions or development support as needed.

Suggestions from the various interviews and community meetings for attraction development include:

- ✓ Last spike museum
- ✓ Kinsol Trestle
- ✓ Water adventure products
- ✓ Creation of a "green" zone in the region working with the First Nations
- ✓ Standardizing the look of developments in keeping with a brand
- ✓ Training school for wine tasters
- ✓ Creation of marine loop
- ✓ Work with regional waste management to do tours of plants
- ✓ Sales program combining rates and activities with a focus on seniors
- ✓ Work with existing sport and recreation facilities to create sporting event attractions
- ✓ Support the development of events – especially arts and cultural events.

TARGET MARKET EXPANSION²

The target market profiles for Vancouver Island are essentially the same for the Cowichan Region. These targets are listed based on the research completed for this report, and the review of marketing reports from surrounding communities.

RECOMMENDATION #3:

Tourism Cowichan continue to provide regional external marketing involving the various communities in promoting their products. The pooling of funding to have professional quality promotions is essential. Improvements to the web site to align with the work being done locally in the communities are important. Tourism Cowichan should work to expand the target markets by working with nearby tourism professionals to increase visits from referrals. Expansion of the brand awareness in the local visitor centres and on internal marketing collateral is needed.

A. Target Visitor Groups

Visitors to the region are day travelers, weekenders, and those visiting from Victoria or Nanaimo which are the base from which they explore the rest of Vancouver Island.

They are residents of the Greater Vancouver Regional District or Vancouver Island. The majority of people within the target groups have some post-secondary education and higher than average household incomes when compared to the rest of the province. In particular, over 25% of the travelers from the GVRD report household incomes in excess of \$80,000 per year.

² The Report on Visitors to Vancouver Island Tourism Region, Tourism B.C. 1998; StatsCan; TAVI; Destination Development and Marketing Plan for Nanaimo, Meyers Norris Penny, 2005.

Things look better from here.



Based on information gathered from the local visitors centres in the Cowichan, the highest volume of visitors come from the rest of B.C., Europe, Alberta, and the Rest of Canada is third. In Duncan and Ladysmith a high number of enquiries also come from local residents.

In particular the target ages which are traveling would be:

Adults with families age 25 – 49 years

- ✓ Looking for short vacation (weekends or two – three day trips)
- ✓ Seeking economy in accommodation and food services; however, they have more disposable income than the same demographics in other markets
- ✓ Seeking activities that appeal to children and youth: soft recreational activities such as cycling; attractions such as science centres; and outdoor venues and parks.

Adults who are empty nesters age 49 – 64 years

- ✓ High level of disposable income
- ✓ Users of high end products and services
- ✓ Seek a sophisticated experience in accommodations, food services, and attractions such as arts and culture or heritage
- ✓ Interested in soft recreation such as golf, fishing, boating.

Why Target these groups?

- These groups are already the primary traveler in the Cowichan region and Vancouver Island. Over 75% of the GVRD residents visiting other parts of the province travel by ferry which ultimately sees these visitors traveling Vancouver Island.
- The target markets identified match the current population of the Cowichan Region. One of the highest ratings for the purpose of traveling for B.C. residents is to visit family and friends. As a result, the present population of the area is attracting people to come to the area. Based on the results from the review of the Cowichan visitor centres statistics, a large number of enquiries come from local residents which also supports this perspective of the target market. Residents take their visitors to locations within the area that they find appealing themselves and that they use.
- People in these target markets are frequent travelers within the province.
- The Cowichan Region can offer an alternate destination to the typical areas visited in Victoria, and the west coast of the Island. The wineries, culture, golf and other activities provide a variety of activities in which visitors can partake.

B. Tourism Industry Professionals

In acknowledging that the opportunities to expand on target markets include accessing visitors who are basing their vacations (or starting and concluding) out of Victoria and Nanaimo, it is critical to be involved in marketing campaigns that these communities engage in throughout the year. Some work has already started in this area by the staff at Tourism Cowichan. It is noted here to emphasize that some of the largest tourism markets and a good source of referrals will come from other tourism professionals. It is important that these professionals are well informed about the attractions of the Cowichan Region and it will be critical to work with them. Some regional businesses already participate in marketing through the tourism organizations in Victoria and there is potential for the regional marketing campaign to participate as well.

Target markets can be increased to put additional effort into Alberta and the rest of Canada, but these targets are best accessed through TVI at this time, as it would take substantial resources to develop these campaigns independently.

C. Expansion of Brand Awareness

There is little visibility of the regional brand in local visitor centres and on local marketing collateral. Tourism Cowichan should work with the local Chambers and other organizations to ensure branding is visible.

Things look better from here.



Developing a consistent look in all graphic design materials with recognizable branding (local and regional) will provide a seamless image for visitors as they go from external marketing information to the local information. An important part of the external messaging is the web site. The web site must link appropriately to the local information sites, and the categories for information must make it easy to access key destination information (for example at the time of this report it was difficult to find the Chemainus Theatre Festival on the Cowichan website.)

PARTNERSHIPS AND COMMUNICATIONS

Recommendation #4:

That Tourism Cowichan develop important network partnerships with external tourism professionals, regional tourism professionals, local stakeholders and other regional government departments. A communication protocol must be developed for information dispersal with stakeholders, Committee, and staff.

A. External and Internal Partnerships

As noted above there are numerous tourism professionals outside of the Cowichan Region who could be very beneficial partners. These professionals range from booking agencies to the visitor centre operators who may do referrals through to the formal tourism agencies such as Tourism Victoria. A few of the businesses within the Cowichan already participate in Tourism Victoria as an overall part of their regular marketing. Other key marketing partnerships would be the golf marketing collaborative, and the Wine Island Vintners Association. Tourism Cowichan should develop extensive partnerships to complement their external marketing campaigns.

Within the region, Tourism Cowichan benefits from the direct involvement of the local visitor centre operators and business operators. With the expanded role for Tourism Cowichan it will be critical to ensure participation at the Board level. There will need to be expanded participation from the various sectors to ensure that the regional group is effectively representing the local areas' needs.

Tourism Cowichan will be operating under the EDC. As such, a unique relationship will be developed between the tourism industry and the economic development of the region. Relations with the parks and recreation and planning departments will also be important to allow development planning to work with the concerns and needs of the industry and balance the needs of the community.

B. Communications

Tourism Cowichan has already established a stakeholder information e-newsletter. This communications tool needs to be useful by including business support and development information, up to date events listings, and key opportunities for marketing, etc. Comments from the local businesses and visitor centres indicate that there is a large amount of duplication of information from TVI, Chambers, and Tourism Cowichan. This should be reviewed as a part of the visitor centre network development and clarification over process can be resolved at that time.

A clear communication protocol will also need to be developed for the internal operations of Tourism Cowichan for Board participation and staff communications.

Things look better from here.



IMPLEMENTATION

In order to implement this program, the EDC will need to validate the proposed plan at the Board level. With a few exceptions there is an interest at the local level, demonstrated through interviews and meetings, in working collaboratively to the benefit of all. In particular, business members see the benefit of the initiative. Without a clear acceptance at the local government levels, there will be no way to move forward on a regional program.

Following that, the next steps of determining staff roles and responsibilities, deciding on the format of the organization, and developing the authority for the group to move forward can be taken. The community will be involved in the organization once it is set as an interim group.

The next focus should be the development of the visitor centre network and policies and procedures for the standardization of services. At this time the needs of the development for the regional hub and the needs of the various centres should be analyzed. Then the costs can be estimated and resourced to proceed with development.

At the end of the first year, procedures will have been developed for the ongoing needs of the organization including marketing, product and system development and visitor services. Staff will be in place and the visitor centres will be formally contracted with Tourism Cowichan for certain aspects of service.

Year two would see an emphasis on the infrastructure development of the visitor centres across the region for brand awareness, and service delivery. This year will also include focusing activities for expansion of the marketing partnerships, solidification of the communications protocol, and increased marketing activities including 2010 opportunities. The baseline industry and visitor profile study by Malaspina University College should take place during this year.

Years three to five are important times to place emphasis on the capital requirements for additional visitor centre development, placing funding where needed to create new opportunities, analysis of marketing and product development impacts, and revising plans to match the needs of the industry. Year three is also 2010 and there will be many opportunities to tap into the promotions and exposure that these games offer. Metrics will be analyzed annually to ensure that the work of the program is on track and having appropriate impact. The baseline study done in the previous year will identify gaps in products and this is the time when the group can focus on clear infrastructure development while continuing to refine all activities.

The following action plan provides an idea for timelines, key initiatives, and responsibility.

Things look better from here.



| Year | | Key Initiative | Action | Responsibility |
|------|------|--|--|--|
| 2007 | 07.1 | Create mandate for new responsibilities of Tourism Cowichan | Prepare and pass resolution to mandate Tourism Cowichan | EDC |
| | 07.2 | | Formalize Board of Tourism Cowichan with appropriate representation | EDC |
| | 07.3 | | Establish policies and procedures for increased authority / responsibilities / budget | Tourism Cowichan Board of Directors / EDC |
| | 07.4 | | Identify funding for Tourism Cowichan | Tourism Cowichan Board / EDC |
| 2008 | 08.1 | Tourism Cowichan | Identify key staff / hire / set up office location with Duncan - Cowichan Chamber | Tourism Cowichan Board |
| | 08.2 | | Review and plan for 2008: includes: marketing campaigns, funding resources, system and product development plans | Tourism Cowichan Board / staff |
| | 08.3 | Standardization of visitor centre services and brand awareness | Establish committee of the visitor service operators to oversee development of service standards, brand expansion, service needs, and contract development for the above | Tourism Cowichan Board / staff / Visitor Service Committee |
| | | | Identify funding needs for visitor service improvements / contracts and source funding opportunities | Tourism Cowichan Board / staff / Visitor Service Committee |
| | 08.4 | Develop baseline statistical information | Start work with Malaspina University College to develop study for 2009 | Staff / Malaspina College / TAVI |
| | 08.5 | Partnership Marketing | Develop and launch marketing initiatives with partners - Tourism Nanaimo, Tourism Victoria, BC Ferries, etc. | Staff |

Things look better from here.



| | | | | |
|------|------|---|--|--------------------------------------|
| 2009 | 08.6 | Stakeholder communications | Continue to develop stakeholder communications by refining and eliminating duplication | Staff |
| | 08.7 | Web development | Continue to expand the web site information including: custom visitor guides and brochures, capture visitor data, track itineraries chosen by visitors to provide information on potential product packaging | Staff / Web committee of the Board |
| | 09.1 | Baseline Study | Implement baseline study and produce results report | Staff / Malaspina University College |
| | 09.2 | Develop statistical systems to track ROI | Work with local businesses and visitor services to develop systems to provide ongoing statistical tracking of response to marketing and infrastructure developments | Tourism Cowichan Board / staff |
| | 09.3 | Visitor Centre Infrastructure | Based on information gathered in previous year, work with Visitor Services Committee to prioritize the needs, and identify funding | Staff / Visitor Services Committee |
| | 09.4 | Identify Product Gaps and create plans to address | Based on the industry profile created by the Malaspina research report, review product gaps and create plans for addressing needs | Tourism Cowichan Board / staff |
| | 09.5 | Marketing expansion | Annual review of marketing program and expansion of campaigns according to results of study. | Tourism Cowichan Board / staff |
| | 09.6 | | Establish single call to action on marketing – 800 # / bookings and packaging reservations centre | Staff |
| | 09.7 | | Tap into 2010 marketing opportunities as much as possible | Staff |
| | 2010 | 10.1 | Product and System Development | Track annual metrics |
| 10.2 | | | Review and prepare | Tourism |

Things look better from here.



| | | | | |
|---------------|------------------|--------------------------------|---|---|
| | | | infrastructure requests: parking, transit, etc | Cowichan Board / staff |
| 10.3 | | | Using gap analysis develop opportunities for new business development: accommodations, transportation, facilities, etc. | Tourism Cowichan Board / staff |
| 10.4 | | | Working with targeted anchor attractions or new proposals, determine appropriate strategies to attract the private sector to the projects | Staff / tourism industry / EDC / FutureCorp |
| 10.5 | Marketing | | Continue to develop appropriate marketing campaigns adjusted to research report results and metrics | Staff |
| 10.6 | | | Continue to develop online presence with possible expansion to online reservations system | Staff / web developer |
| 10.7 | | | Continue to market through any 2010 opportunities | Staff |
| 10.8 | | | Continue to lead effective marketing partnerships with local tourism providers as well as tourism professionals | Staff |
| 10.9 | Visitor Services | | Work with visitor centres to provide needed infrastructure improvements and access to funding | Staff / Visitor Services Committee |
| 10.10 | | | Review of annual services contract for standardization requirements – update and re-sign contracts | Staff / Tourism Cowichan Board / Visitor Services Committee |
| 10.11 | | | Develop standardized graphic design requirements for all local (internal) marketing | Staff / Visitor Services Committee |
| 2011 and 2012 | 11.1 | Product and system development | Annual metrics collection and analysis | Staff |

Things look better from here.



| | | | |
|------|------------------|--|---|
| 11.2 | | Continue to review and prepare infrastructure requests: parking, transit, etc | Tourism Cowichan Board / staff |
| 11.3 | | Using gap analysis develop opportunities for new business development: accommodations, transportation, facilities, etc. | Tourism Cowichan Board / staff |
| 11.4 | | Continue working with targeted anchor attractions or new proposals, determine appropriate strategies to attract the private sector to the projects | Tourism Cowichan Board / staff |
| 11.5 | Marketing | Aim most promotions to drive interest in the website. Implement targeted advertising, media relations, and outreach to the tourism trade with the call to action linked to the website and 800 # | Staff |
| 11.6 | | Continue to develop online presence and electronic marketing through booking and referral capabilities, cooperative marketing, product packaging, and data capture information. | Staff |
| 11.7 | | Continue to lead effective marketing partnerships both locally and externally. | Staff |
| 11.8 | | Ensure research and measurements are track for all marketing efforts and test effectiveness of marketing channels. Year 5 would be an excellent time to revisit the baseline statistics from 2009 and check results. | Tourism Cowichan Board / staff |
| 11.9 | Visitor Services | Continue to work collaboratively for the needs of the individual visitor service centres and the regional imprint on these services. Explore if there are | Staff / Visitors Services Committee |

Things look better from here.



| | | |
|-------|---|-------------------------------------|
| 11.10 | more services which could be done regionally. Continue to update local marketing designs with regional brand awareness ensuring local uniqueness is preserved. | Staff / Visitors Services Committee |
| 11.11 | Continue to work closely with the local visitor centres to assist in infrastructure and service development | Staff / Visitors Services Committee |

Summary of Significant Budget Items

The expenses identified below are for the costs of the general operations for Tourism Cowichan. The matching funding for marketing is not included in the budget below as it is additional to the core costs for the Committee. The important annual budget items are as follows:

2007

| | |
|--|----------------|
| Establishing the New Committee | 30,000 |
| Administrative overhead | 15,000 |
| Establishing Visitor Service Committee and standards | 20,000 |
| 2007 Marketing Campaign (already committed) | 120,000 |
| Total | 185,000 |

2008

| | |
|---|----------------|
| Staff Wages | 65,000 |
| Contract Marketing | 30,000 |
| Administrative overhead | 30,000 |
| Marketing ** | 100,000 |
| Visitor Network Standards Development | 50,000 |
| Visitor Centre improvements capital costs | TBD |
| Stakeholder Communications | 10,000 |
| Total | 285,000 |

TBD = To be determined

** does not include leveraged marketing – this is cost to CVRD / EDC

Things look better from here.



2009

| | |
|---|----------------|
| Staff Wages | 65,000 |
| Contract Marketing | 30,000 |
| Administrative overhead | 30,000 |
| Marketing | 100,000 |
| Increase to web presence | 20,000 |
| Visitor Centre improvements capital costs | TBD |
| Product and Visitor Research Project | 30,000 |
| Total: | 245,000 |

2010

| | |
|---------------------------------|----------------|
| Staff Wages | 75,000 |
| Contract Marketing | 30,000 |
| Administrative overhead | 30,000 |
| Marketing | 100,000 |
| 2010 targeted campaign | 50,000 |
| Visitor Services graphic design | 50,000 |
| Total: | 335,000 |

2011 and beyond

| | |
|---|----------------|
| Annual Operating Costs | 250,000 |
| 2010 Follow up campaign | 50,000 |
| Anchor attraction development | 50,000 |
| Accommodations strategy development | 50,000 |
| Visitor Centre improvements capital costs | TBD |
| Total: | 400,000 |

The above values are estimates only, designed to provide suggested annual budgets, and cannot be relied on as accurate measures of costs. All operations and capital projects are scalable. This implementation plan should be regarded as a starting point requiring continuous development over the years of operations.

Things look better from here.



Potential Funding Sources

Core funding sources are limited for the Cowichan region. It will be important that municipalities and the regional areas consider tourism industry development as a priority for the area and provide a source of core funding for the operations of the regional service. **It is also important that the local governments do not redirect existing funding already in place for the visitor centres operations.** This program creates some efficiencies to lessen the burden of administration in smaller centres for existing visitor services, but as the current locations are generally under-funded, at no time should the recommendations of this report be considered as superseding any of the local centres needs.

The region will need to consider how to resource a larger ongoing Committee through taxation or other sources. Project funding may be located through the Island Coastal Economic Trust, Tourism B.C., UBCM Community Tourism future funding, and TVI. A hotel tax of 2% has become the mainstay for many regions in the Province. This would require extensive canvassing by the EDC to create the local business support for the tax. Although useful, the Cowichan cannot depend on the hotel tax as the major contributor towards the core funding at this time due to the low number of hotel / motel properties in the region. The Island Coastal Economic Trust might be approached as a core-funder for perhaps a period of three years to allow this unique pilot project (never done before in the province) to proceed.

The recommendation of this report is that the initial two years of the program be funded by UBCM, and core CVRD funding. The EDC should initiate discussions with the Island Coastal Economic Trust for pilot program funds for the activities for a 3 year period to provide stability for the initiative to develop. Over the initial 3 years, EDC / Tourism Cowichan should initiate the process of securing hotel tax for ongoing funding after year 4.

BENCHMARKING METRICS

The implementation plan above outlines several key times for checking on and evaluating the program and its components. After the baseline study by Malaspina University College, sufficient information will be available to develop a systematic way to track successes. Key areas to track over time include:

- ✓ Hotel room inventory and occupancy rates: establish a database with information from the research project. Have local businesses cooperate in providing monthly occupancy rates in order to estimate the nights spent in the community which can provide an estimation of economic activity and impact. Graph over time to review supply and demand and follow trends. (Ensure confidentiality of business information).
- ✓ Attraction and events visitor counts and admissions: these can be useful indicators of total visitor numbers and in tracking trends at events and specific attractions. This data may help confirm trends that you see in tax revenue data, and may reveal some changes in attractions or events.
- ✓ Visitor information from visitor centres: annual collection of stats already done by each visitor centre to create a region specific information database.
- ✓ Cost information from Visitor Centres and promotions: tracking this information will assist in determining the return on investment for promotions. The most common way is to divide the total tourist expenditures by the amount spent on promotions. Visitor centre costs should be broken out and tracked as a separate expenditure in all operators' budgets.
- ✓ Regular informal surveys of stakeholders' satisfaction: surveys could be done on a regular basis to provide information on marketing trends, challenges, and feedback on the success of the regional program.
- ✓ Visitor and operator survey should be repeated every five years: this will allow for accurate measurement of changes in market trends, success of the program, visitor satisfaction, and market demand.

Things look better from here.



CONCLUSIONS

The Cowichan region has committed to work together regionally for create a brand and develop marketing initiatives with limited resources. Discussions on the next steps to develop the tourism industry shows the communities are unsure on what direction is the best to follow. The development of a Regional Tourism Organization will provide the leadership to continue development of the tourism industry in a planned, structured manner which will ultimately create the foundation for successful growth.

In order to create a successful development program the following recommendations need to be implemented:

RECOMMENDATION #1:

Create an expanded model of Tourism Cowichan for service delivery and industry development.

RECOMMENDATION #2:

Complete a detailed analysis of the product inventory in the region, business profiles, employment, and visitor profiles in conjunction with Malaspina University College.

RECOMMENDATION #3:

Tourism Cowichan continue to provide regional external marketing involving the various communities in promoting their products. The pooling of funding to have professional quality promotions is essential. Improvements to the web site to align with the work being done locally in the communities are important. Tourism Cowichan should work to expand the target markets by working with nearby tourism professionals to increase visits from referrals. Expansion of the brand awareness in the local visitor centres and on internal marketing collateral is needed.

Recommendation #4:

That Tourism Cowichan develop important network partnerships with external tourism professionals, regional tourism professionals, local stakeholders and other regional government departments. A communication protocol must be developed at the Committee for information dispersal with stakeholders, Committee, and staff.

Along with these four key recommendations a full implementation plan and suggestions for annual budgets are provided. Not only does this program require a commitment from the regional government to implement it, but also core funding must be secured. Potential revenue sources include the need to explore the 2% hotel tax to assist with core funding. Project based funding needs could be secured through: Island Coastal Economic Trust; TVI; Tourism B.C. and upcoming UBCM Community Tourism phases.

Key to the implementation of this program is the need to track results and ensure that there is appropriate return on investment. The baseline research project suggested to be undertaken with Malaspina University College should be followed up by developing annual data collection protocols.

Things look better from here. 

Tourism can be increased by sustained, well targeted, and professional initiatives. To identify and attract the high value customer, to build attendance levels, extend length of stay, expand the seasons and increase economic impact, products must be competitive, there must be a sophisticated marketing and promotions program, a stable tourism organization, and the resources necessary to attract and service visitors. Combining regional funding and skills makes sense in an area where there are limited resources. Further, ensuring the alignment of local visitor services with the overall strategy is critical. Administrative and cost burdens on small visitor centres can be alleviated through joint activities such as training and publication distribution. The development of highly visible visitor centres at strategic locations and at least one on the highway will ensure a larger number of visitors choose to stop and stay in the Cowichan.