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Gaining the Edge: 2012–2016 was released in October 2011, after extensive consultation with industry partners. The strategy resulted in some key successes for the tourism sector, with many of its actions completed, including:

» The launch of Destination BC, the Crown corporation responsible for marketing British Columbia as a destination to domestic, national and international travellers;

» The successful implementation of Destination BC’s marketing campaigns and a revitalized Super, Natural British Columbia™ brand;

» Assistance to more than 100 communities and 19 tourism industry sectors to develop and promote world-class experiences for visitors; and

YVR has attracted new or increased international direct flights linking B.C. to the world including Chengdu, China; Shenyang, China; Kunming, China; Tokyo (Haneda), Japan; Osaka, Japan; Sydney, Australia; Brisbane, Australia; Manila, Philippines; Paris, France; Munich, Germany; Reykjavik, Iceland; Zurich, Switzerland; Rome, Italy; Mexico City, Mexico; Seattle; Los Angeles; Las Vegas; Anchorage; San Francisco; Phoenix; New York; and WestJet’s first trans-Atlantic flights to London (Gatwick).

B.C. is an internationally renowned destination, with spectacular communities in close proximity to wilderness, and an excellent reputation for delivering state of the art experiences for travellers.

The tourism industry in British Columbia continues to grow. Between 2012 and 2013, tourism revenues rose 3.6%, the sector’s contribution to B.C.’s GDP grew 2.1%, and employment increased by 3.0%.

Visitor numbers, provincial hotel occupancy rates, average daily room rates and other indicators of tourism’s economic performance also rose in 2013, and this trend continued through 2014 and into 2015.

Our goal is to build on these successes, increasing the volume of visitors to our province, improving access for international travellers, and sustaining a profitable tourism sector.

Gaining the Edge: 2015–2018 has been crafted to maintain this momentum. This updated strategy renews our investment commitments and creates new actions to address emerging opportunities.

Along with activities extending to 2018, this strategy supports the BC Jobs Plan commitment to grow tourism revenues and jobs, and showcases the important role tourism plays in local and provincial economies. As one of the BC Jobs Plan’s eight priority industry sectors, this strategy helps ensure tourism continues to play a pivotal role in our vision of a strong tomorrow.

Message from the Minister of Jobs, Tourism and Skills Training and Minister Responsible for Labour

HONOURABLE SHIRLEY BOND
MINISTER OF JOBS, TOURISM AND SKILLS TRAINING AND MINISTER RESPONSIBLE FOR LABOUR
The tourism sector is one of the largest industries in British Columbia with more than 19,250 businesses employing more than 132,200 people, including 6,930 jobs in Aboriginal tourism. In 2013, tourism's contribution to B.C.'s GDP was $7.326 billion; 4% of B.C.'s total GDP.

### Worldwide Competition

Around the globe, tourism is one of the largest and fastest growing economic sectors. According to the United Nations World Tourism Organization (UNWTO), international tourism arrivals grew by 5% worldwide in 2013 reaching 1.087 billion. The UNWTO predicts international tourism arrivals will increase at 3.3% annually, topping 1.8 billion by 2030.

This growth means tourism is also one of the world’s most competitive industries, and the number of competitors is increasing. While Canada ranked eighth in global market share in 2002, the country dropped to 17th place by 2013. Canada’s declining share however is not solely the result of new players in the market, and can also be attributed in part to a decline in the total number of tourists coming to Canada.

British Columbia continues to perform better than the rest of Canada, with international overnight arrivals increasing 5.3% in 2014 to 4.65 million visitors; from 4.42 million visitors in 2013. Much of this success was seen through an increase of overnight U.S. visitors (about 99,000) and an increase in visitors from China (about 53,000). This strength continues into 2015.

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Context
**Authentic Experiences**

Travellers are seeking more meaningful and personal connections from their travel experiences, and British Columbia offers an extraordinary potential to meet this demand. Alongside culinary excellence and cultural diversity, B.C.’s most significant advantages in the global tourism marketplace lie in the scenic landscapes that contribute to our brand. British Columbia hosts a unique combination of mountains, forests, ocean, wildlife and natural beauty that resonates with our visitors.

A world-renowned parks system reflecting the diversity of B.C.’s landscapes, and a regulatory framework that focuses on sustainable management, ensures the province will remain Super, Natural British Columbia™.

Aboriginal cultural tourism is another defining feature of B.C.’s unique tourism experience. It is our fastest growing sector, more than doubling between 2006 and 2011. One-in-four visitors seek out Aboriginal cultural experiences during their stay in British Columbia.

Travel experiences offering the most significant short-term and long-term visitor volume potential for B.C. include touring and exploring, city stays, outdoor adventure, skiing, and Aboriginal culture.

**Trip Planning**

Technology is increasingly connecting consumers with travel information as destinations post videos and contribute to information sharing sites, and cellular phones host personalized travel apps. Through social media and online marketing, power has shifted from the marketing organizations and businesses to individual travellers. Facebook hosts more than one billion users, Twitter has more than 200 million month users and TripAdvisor receives more than 60 million visitors each month. These and other social media channels represent vast opportunities for B.C. tourism marketers to reach potential visitors.

Approximately 90% of all travellers now use these online tools to plan their trips and inform their choices on the ground. This upswing can be seen in a ten-year decline in the use of British Columbia’s visitor centres, which served 700,000 fewer visitors in 2014 compared to 2005*, and demonstrates a clear need to re-examine how visitor services are provided in British Columbia. When visitors return home, 70% frequently post reviews, positioning the online information sharing culture as British Columbia’s best source for referrals.

**Access to B.C.**

B.C.’s west coast location offers travellers the opportunity to reach the province by road, water, rail and air. Transportation infrastructure upgrades including a new Port Mann Bridge in the Lower Mainland, Nexus lane improvements at border crossings, and webcams linked to Drive BC all benefit tourism. As outlined in B.C. on the Move: A 10-year Transportation Plan for BC, the Province is investing $2.4 billion in initiatives that strengthen access to B.C. including airport infrastructure, rest area upgrades, cycle tourism, and ferry terminal infrastructure.

Canada’s federal government is to be commended for its commitment to ongoing visa reforms and process improvements, such as the Can+ program, expanding the Visa Application Centre network to assist applicants, and allowing more airlines and countries to be part of its transit without visa programs. Already, new flights are arriving at Vancouver International Airport from Tokyo, Paris, London, China, and Iceland.

Jurisdictions in competition with Canada however continue to host more liberal air transportation agreements, often with B.C.’s emerging markets. New air transportation agreements (ATA) must be negotiated by the federal government, alongside visa processing and security requirements, to increase international access to British Columbia. Easier international access for low-risk international travellers will allow for job creation, investment and revenue growth in tourism.
Labour Market

Tourism remains a key employment generator. In 2013, tourism sustained more than 132,000 jobs (up 3% from 2012) with three B.C. regions (Vancouver/Coast and Mountains, Vancouver Island, and Thompson Okanagan) hosting 88.5% of all tourism employment in the province. Since 2003, tourism sector employment in B.C. has grown 17.6% and tourism wages and salaries have increased by more than 34.4%* ($4.5 billion in 2013).

A region-by-region labour market analysis by go2hr, the tourism industry’s human resource organization, projects more than 100,000 tourism and hospitality related job openings across the province between 2012 and 2020, and an estimated shortage of about 14,000 workers to fill these jobs.

Provincial Investments

On April 1, 2013, the province established the Crown corporation Destination BC to market British Columbia domestically, nationally and internationally. Destination BC aligns community, regional and industry marketing, coordinating and amplifying B.C.’s brand in the global tourism market.

There are more than 125 Destination Marketing Organizations (DMOs) and sector organizations working with Destination BC to reach travellers overseas, across the US, through Canada and within B.C. These include:

» 19 sector marketing organizations (e.g. skiing, wine touring, mountain biking);
» 5 regional DMOs (RDMOs); and
» 100+ municipally operated or community-level DMOs (CDMOs).

The number of tourism marketing organizations in B.C. has increased significantly over the last decade, with most of this growth occurring as communities embrace tourism to diversify and strengthen their local economies.

The province of British Columbia invests more than $90 million in the tourism sector each year to support this growth. In addition to more than $50 million in annual funding to Destination BC, the province supports a Municipal and Regional District Tax (MRDT) program which provides more than $28 million annually to support tourism marketing, programs and projects within communities. Budget 2015 enhanced this program with an amendment to the Provincial Sales Tax Act to increase the maximum allowable rate for the MRDT to increase potential funding to communities.

The Province also invests more than $10 million each year through the Resort Municipality Initiative (RMI) to address the unique circumstances of resort-oriented municipalities. This program provides an ongoing incentive-based revenue stream to develop and enhance infrastructure and amenities to grow local and regional tourism opportunities.

Along with significant investments in transportation infrastructure, BC Parks, recreation sites and trails, culture and heritage, small business supports, and landmark attraction and hosting programs designed to attract signature events to B.C., these investments are all working in tandem to increase visitor numbers and tourist spending in the province, and enhance the province’s long-term competitiveness and sustainability.
Successes to Date

There has been strong growth in tourism since 2011 when *Gaining the Edge: 2012–2016* was published.

The 2012 strategy accomplished many goals, contributing to increasing growth trends evident today. These accomplishments include:

- Creation of Destination BC as an industry-led Crown corporation in April 2013 to market B.C. as a tourism destination to domestic, national and international travellers;
- Formation of Destination BC’s Tourism Marketing Committee, with regional representatives providing advice on marketing efforts that reflect industry and community perspectives;
- Revitalization of the *Super, Natural British Columbia™* brand to strengthen brand appeal, increase urgency with travellers from key markets and draw industry partners toward greater alignment;
- Increased visitor volumes from nearby markets (B.C., Alberta and Washington), top priority markets (Ontario, California, Australia, Germany and Japan), and emerging markets (China, Mexico and India);
- Contribution of more than $4 million in funding to the Aboriginal Tourism Association of BC, spurring a doubling in the number of market-ready B.C. Aboriginal businesses to more than 300;
- Support for the development of the industry-led *BC Tourism Labour Market Strategy*;
- New direct flights to B.C. from Tokyo and Osaka, Japan; London, England; Reykjavik, Iceland; Taipei, Taiwan; Paris, France; Los Angeles, USA; and, Sydney, Australia;
- Liquor law changes that make it easier than ever to acquire special event licenses and allow ski hills and golf courses to offer more events without having to get a license for each event;
- Harnessing the power of emerging technology by being the first destination in North America to promote a destination using interactive 3D virtual reality technology called Oculus Rift; and
- Bringing national and international attention to British Columbia by attracting renowned events such as the 2013 Times of India Film Awards, the 2014–2016 TED Talks conferences, the 2015 Canada Winter Games, the 2015 FIFA Women’s World Cup, and the 2016 Rugby Sevens World Series.


To learn more about tourism as part of the *Canada Starts Here: BC Jobs Plan*, please visit the website: http://engage.gov.bc.ca/bcjobsplan/files/2014/09/BCJP_3Year_Progress_Report.pdf
To take advantage of the tremendous opportunities tourism represents, the Government of B.C. is renewing its commitment to facilitate greater alignment and efficiencies in B.C.’s tourism marketing system and to amplify B.C.’s marketing message in a globally competitive tourism marketplace.

Ministries across the provincial government are responsible for policies and programs that directly affect tourism. These include the management of Crown land, culture and arts, parks and protected areas, transportation, heritage, recreation sites and trails, and programs and policies that can each have a direct or indirect effect on B.C.’s desirability as a travel destination and a place to operate a tourism business. The Province also coordinates a range of event hosting programs, including the Tourism Events Program, a new program designed to attract landmark events, supporting B.C.’s international reputation as a destination of choice.

Greater coordination between these programs will amplify their effectiveness and ensure continued benefits to communities and tourism businesses. Under this strategy, the Ministry of Jobs, Tourism and Skills Training will work across government to maximize the provincial government’s collective investment in tourism, providing oversight for Destination BC, coordinating investments through the MRDT, the Resort Municipalities Initiative (RMI), the Tourism Events Program, and seeking opportunities for new partnerships and strategic investments across government.

The Province also commits to work with communities, destination marketing organizations, development trusts and tourism sector associations to bring a systemic, collaborative approach to the investment of public dollars in tourism marketing and development. Meaningful, well-timed strategic investments will ensure the best tourism outcomes for businesses and communities.

This includes an interest in optimizing the return on existing tourism marketing dollars available to provincial, regional and community destination marketing organizations across B.C.

New program requirements and administrative processes under the MRDT will ensure enhanced accountability and transparency in the use of program funds. Alignment between the MRDT and RMI will further ensure communities are maximizing limited program funding to advance local tourism marketing, programs, projects and infrastructure development without duplication of uses between the programs. Further to this interest in integration, Destination BC will work across the RDMOs and CDMOs to ensure marketing efforts are coordinated and complementary to their province-wide marketing strategy.

Because small businesses represent more than 80% of B.C.’s tourism industry, the Province will continue to foster an environment that allows these small businesses to flourish and grow within the sector. This includes simplifying the regulatory environment and helping small businesses access needed supports.

Finally, British Columbia will modernize its approach to visitor services to ensure travellers are able to access information when and where visitors need them, with easy and dynamic access to information in person and online. Destination BC will guide communities in rethinking how online, mobile and crowd-sourcing channels can help meet the community’s visitor information servicing needs, alongside the traditional visitor centre model.
Guiding Principles

» The tourism sector will continue to contribute significantly to British Columbia’s diverse, strong and growing provincial economy.

» The tourism sector will contribute to a diverse economy, providing jobs and benefits province-wide and through all seasons.

» British Columbia will seek out new opportunities to grow the number of visitors in key emerging markets.

» British Columbia will achieve tourism growth by concentrating efforts on those products and markets where B.C. has a competitive advantage, including promotion of the diverse range of nature-based, urban, adventure and Aboriginal tourism experiences available in B.C.

» Product and market priorities will be based on the best research and tourism market intelligence in Canada, and will accommodate the changing needs of the consumer.

» British Columbia will be the most business-friendly jurisdiction in which to operate a tourism business in North America.

» Collaboration and partnership between national, provincial, regional and community destination marketing organizations, as well as sectors and individual tourism businesses, are key to realizing B.C.'s competitive advantage.

Performance Indicators

Gaining the Edge: 2012–2016 established an aggressive, multi-year revenue target of $18 billion by 2016. This target was bold, aspirational, difficult to reach, and perfect for the fastest growing sector of British Columbia’s economy.

To reflect this momentum and the Province's commitment to pursue the tremendous opportunities tourism can bring, this strategy maintains the target of 5% annual revenue growth. While this target remains ambitious, it is achievable if world conditions remain favourable.

In addition to revenues, Gaining the Edge: 2015–2018 will also track the performance measures that government, businesses, industry associations, regions, communities and First Nations all require to keep pace within a competitive global marketplace:

» Tourism volume and revenue growth rates;

» Growth of overnight visitor expenditures;

» Tourism contribution to provincial Gross Domestic Product (GDP);

» Number of tourism businesses, including Aboriginal cultural tourism enterprises;

» Tourism employment (provincial and regional);

» Average tourism salary;

» Overall International arrivals; and

» Arrivals from key markets (e.g., USA, China).

Collectively, these indicators will offer the tourism sector a clear picture of the state of tourism in British Columbia, including opportunities to amplify growth. Finally, Destination BC will track the Province’s Net Promoter Score, which measures how likely a visitor is to recommend British Columbia as a travel destination, to a friend, family member or colleague; a solid measurement of satisfaction and customer loyalty in an information sharing culture.
### Net Promoter Score

For the tourism industry in British Columbia, word of mouth advocacy is critical. One way to monitor word-of-mouth advocacy is through the Net Promoter Score®, which measures the number of promoters and detractors a destination has. It creates a simple and clear view of a consumer’s likelihood to recommend and refer.

By asking one simple question, “On a scale of 0–10, how likely are you to recommend B.C. as a travel destination to a friend, family member or colleague?” we’re able to determine our Net Promoter Score. Visitors who respond 9 or 10 are considered “promoters”, those who respond 0–6 are “detractors”, while the remainder are “passives”. The Net Promoter Score is the difference between the percentage of respondents who are “promoters” and “detractors”.

#### B.C. Net Promoter Score 62.7%

<table>
<thead>
<tr>
<th>Detractors 7.1%</th>
<th>Passives 23.1%</th>
<th>Promoters 69.8%</th>
</tr>
</thead>
</table>

Net Promoter Score = % of Promoters - % of Detractors
2015–2018 Tourism Strategy

**Goal 1: Leadership Through Partnership, Alignment and Coordination**

“Facilitating greater alignment, investments and efficiencies in B.C.’s tourism system to amplify B.C.’s development opportunities and marketing messages.”

- Work with government agencies, marketing organizations, communities and tourism associations to align marketing and development roles and activities (national, provincial, regional and community) to eliminate duplication of efforts and address critical gaps.
- Create a more consumer-focused, evidence-based approach to tourism investments.

**Goal 2: Focused Marketing**

“Building on Destination BC’s successful marketing initiatives to compel visitors from key markets.”

- Use innovative strategies to drive long-term growth in visitation.
- Target provincial marketing efforts, using sound research and focusing on high potential markets.

**Goal 3: World-Class Experiences**

“Supporting industry, regions, communities and Aboriginal people to develop or enhance the tourism products and experiences that draw people to our spectacular province.”

- Build an outstanding system of tourism information supporting travellers’ needs and preferences.
- Take full advantage of the tourism benefits of investments in public infrastructure.
- Support the development of outstanding tourism experiences and services across B.C.

**Goal 4: Enhancing Competitiveness and Sustainability**

“Adopting policies and undertaking strategic investments to remove barriers and support tourism growth.”

- Increase the competitiveness of B.C.’s tourism businesses.
- Ease the flow of travellers to, and within B.C.
- Enhance Crown land policies to support the needs of nature-based tourism businesses.
- Support the development and retention of a strong tourism workforce.
Goal 1: Leadership Through Partnership, Alignment and Coordination

“Facilitating greater alignment, investments and efficiencies in B.C.’s tourism system to amplify B.C.’s development opportunities and marketing messages.”

STRATEGY
Work with government agencies, marketing organizations, communities and tourism associations to align tourism marketing and development roles and activities (national, provincial, regional and community) to eliminate duplicate efforts and address critical gaps.

ACTION
Government will create a framework to strategically align the Province’s tourism-related marketing and development investments.

To maximize the benefits to both the traveller and the industry, it is critical that the efforts of Government, community and industry in tourism marketing and development are coordinated and moving in the same direction. Government policies (e.g. liquor act changes), Crown assets (e.g. highways, heritage sites, BC Parks) and programs (e.g. event hosting, Bike BC) all play a role in supporting tourism.

The strategic framework will better align the $90 million-plus invested annually in Destination BC, the Municipal and Regional District Tax, the Resort Municipality Initiative and investments across ministries by:

» Substantively enhancing the effectiveness of provincial investments in tourism marketing by better aligning existing resources and streamlining administrative costs to increase the level of provincial funds available for marketing though Destination BC;

» Encouraging greater collaboration through an integrated marketing approach between Destination BC, community destination marketing organizations, and regional destination marketing organizations; and

» Engaging tourism-related programs and assets across B.C. ministries in the development of a provincial destination development strategy.

The objective of creating alignment between these investments and programs is to eliminate potential overlaps in tourism marketing and leverage government investments. It is also essential that we support efforts by communities and tourism businesses to develop and align community tourism plans with regional and provincial plans in ways that maximize the economic and social benefits of tourism growth.

ACTION
Government will better coordinate ministries to deliver tourism-related policies, programs and investments.

The levers that support tourism within the provincial government are dispersed across numerous ministries. The Ministry of Jobs, Tourism and Skills Training will provide leadership to other provincial ministries in ways that advance their ministry goals and better support the delivery of their programs that affect tourism. The ministry will also provide analysis, advice and guidance on policy challenges and opportunities and escalate the profile and potential for tourism at the most senior ranks within other ministries.

ACTION
Destination BC will create a more powerful marketing network across B.C. — highly integrated with greater strategic alignment around the new brand and built on leveraging investments with federal, provincial, regional, community and industry partners.

Destination BC will seek partnerships and drive marketing alignment with Destination Canada, regional and community destination marketing organizations as well as engaging in opportune marketing partnerships with attractions, parks, airports, airlines, major events, festivals and sport events.
**Strategy**
Create a more consumer-focused, evidence-based and accountable approach to tourism investments.

**Action**
Government will implement a stable and predictable funding formula for Destination BC that links its funding and performance to tourism industry outcomes as a whole.

The commitment to develop a performance-based funding formula for Destination BC is enshrined in the Destination BC Corp Act and remains a significant deliverable for the provincial government. The formula will tie Destination BC’s funding to annual tourism-related provincial sales tax (PST) revenues, Destination BC’s performance and be implemented in a way that does not impact government’s fiscal plan.

**Action**
Government will implement an enhanced accountability framework for the Municipal and Regional District Tax program to facilitate better alignment, improved accountability and transparency, and stronger return on the investment.

As part of Budget 2015, the Minister of Finance introduced amendments to the Provincial Sales Tax Act to increase the maximum rate of tax collected from accommodations under the MRDT program from 2% to 3%. The increase is entirely voluntary and will only be actioned if local governments, with support from local accommodation providers and tourism stakeholders, apply for the increase.

Parallel to this increase, Government is making improvements to the MRDT program requirements, providing clarity to the application process, program policies, eligible uses of MRDT funds and the reporting requirements. The revised program requirements include submission of an annual tactical plan, financial reports and annual performance reports detailing specified performance metrics. These strengthened requirements are enhancing program accountability, transparency, and reporting for all MRDT communities.

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**Goal 2: Focused Marketing**

“Building on Destination BC’s successful marketing initiatives to compel visitors from key markets.”

**Strategy**
Use innovative strategies to drive long-term growth in visitation.

**Action**
Destination BC, with industry and other tourism partners, will build long-term equity for the Super, Natural British Columbia® tourism brand, to inspire travellers to actively consider B.C., and to connect travellers and the travel trade with B.C. tourism businesses.

Destination BC recently refreshed the Super, Natural British Columbia™ brand to differentiate British Columbia in the marketplace, strengthen the province’s appeal, and to foster an urgency to visit. Over the next three years, Destination BC will continue to build this brand by reducing non-core activities and increasing investment in demand-generation initiatives including co-operative marketing programs.

**Action**
Destination BC will increase B.C.’s visibility in digital media, to encourage and amplify conversations around travel in British Columbia through social media channels.

Given recommendations from friends, family and acquaintances are often the most effective tourism messages, Destination BC will use social media to drive traveller advocacy and encourage more visits.

**Action**
Destination BC will collect, create and curate exceptional marketing content that engages travellers and encourages them to share their experiences.

B.C. is bursting with evocative stories, providing Destination BC with tremendous opportunities to fuel dynamic relationships with consumers through storytelling and content marketing on diverse platforms. Key influencers, industry and other partners will be engaged to collect and create content to reinforce B.C.’s brand.
STRATEGY
Target provincial marketing efforts, using sound research and focusing on high potential markets.

ACTION
Destination BC will provide market insights and shareable, scalable platforms and technologies to help B.C. tourism businesses become more formidable competitors.

Destination BC is building its capacity to gather traveller insights through research and data analytics along the path-to-purchase and while travellers are in-market. Interpreting and making this information available to B.C. tourism businesses will ensure the sector remains competitive.

ACTION
Destination BC will increase investments to motivate visits from high-potential growth markets, including supporting Destination Canada’s efforts to increase demand for travel to Canada.

Destination BC conducts an annual evaluation of its top 10 markets, examining the current importance, short- and long-term potential, as well as other market factors and considerations. Alberta, Washington, California and China are the geographic markets that best represent opportunities for growth in 2015 and will see increased investments. Destination BC will maintain investments in British Columbia, Ontario, United Kingdom, Germany, Australia and Japan and will respond to market requests and monitor opportunities in South Korea, Mexico and India.

Destination BC will work with regions, communities and cities to align marketing efforts in high-potential, nearby markets (BC residents, Alberta and Washington).

Goal 3: World-Class Experiences

“Supporting industry, regions, communities and Aboriginal people to develop or enhance the tourism products and experiences that draw people to our spectacular province.”

STRATEGY
Build an outstanding system of tourism information supporting travellers’ needs and preferences.

ACTION
Destination BC, with communities and industry, will build upon B.C.’s existing success in visitor services by developing and implementing a forward-thinking Visitor Services Strategy.

Visitor centres create a positive visitor impression, and encourage longer stays and travel in all regions of the province, generating economic benefit to tourism businesses and communities. As digital information and social interaction play an increased role in visitors’ travel decisions, many centres and communities are recognizing the need to evaluate ways in which to further engage visitors in addition to the traditional ‘bricks and mortar’ model. The strategy will leverage both in-person and on-line services to ensure exemplary visitor services will be available to travellers whenever and wherever they need them.

STRATEGY
Take full advantage of the tourism benefits of investments in public infrastructure.

ACTION
Government will continue to invest in British Columbia’s natural infrastructure.

Visitors often travel to B.C. to experience nature in a way unavailable to them in their home country. B.C.’s parks system, for example, is one of the largest and most significant in the world and a key attraction for both citizens and tourists. BC Parks attendance increased to 21.35 million visits, the fourth consecutive annual increase.
Over the coming years, BC Parks will invest to refurbish day-use, camping, trails and marine park facilities; improve accessibility in parks across the province; address health and safety issues; rejuvenated shower buildings, playgrounds and picnic shelters; and improve interpretation displays and accessibility.

B.C. also has significant recreation activities that take place on Crown land outside of parks that are provided by businesses or undertaken by individuals. This includes trails, recreation sites, ski hills, boat docks, fishing lodges, hunting camps and other infrastructure. Protecting the natural landscapes and assets, and maintaining and enhancing amenities for visitors, bolsters the province’s Super, Natural British Columbia® brand.

**ACTION**

Government and Destination BC will invest $3 million per year, beginning in 2015/16, to upgrade rest stops and visitor services in B.C.

Government identified a need to improve rest stops and visitor services to strengthen the quality of experiences for the travelling public. Road touring is a popular tourism product and these services play a key role in the quality of the travellers’ experiences in B.C. The investments will focus on increasing the number and quality of roadside pull-offs, as well as restroom facilities at B.C.’s 170 roadside rest stops. At B.C.’s 108 community-run visitor centers and five provincially run centres, Destination BC will explore opportunities to enhance access to travel information and upgrade the availability of on-line services.

**ACTION**

Government will invest in cycling infrastructure and implement a cycling tourism signage and marketing strategy.

British Columbians are known for their good health. As such, citizens expect their governments to facilitate access to opportunities to engage in healthy lifestyle choices. Cycling for transportation and leisure is one of those activities and investing in cycling benefits tourists as much as locals. The Ministry of Transportation and Infrastructure will spend $18 million between 2015 and 2018 to partner with communities to build new bike lanes and trails in B.C.

Additionally, the ministry will work with Destination British Columbia, local governments and stakeholders to promote cycling tourism in B.C. The strategy will provide cyclists with a variety of different riding experiences — from leisurely day rides through wine country to challenging multi-day rides of several hundred kilometres.

**STRATEGY**

Support the development of outstanding tourism experiences and services across B.C.

**ACTION**

The Province and Destination BC will expand destination development strategies through a coordinated approach with destination marketing organizations and communities to develop and enhance B.C.’s current and future tourism assets.

A destination development strategy positions a destination to make future strategic decisions, address issues and capitalize on opportunities by coordinating planning, policy, and capacity-building efforts. The strategy will improve the communities’ attractiveness as destinations, provide clarity of tourism priorities to community leaders and better align development and marketing efforts. The Province will instruct Destination BC on key cross-ministry priorities in the development of a provincial destination development plan, aligning government investments with destination development activities and community tourism plans.

**ACTION**

Government will coordinate the development and implementation of cross-ministry hosting strategies, including the introduction of a new Tourism Events Program.

The Province will implement new event and hosting programs to attract landmark events, supporting communities and organizations in their efforts to make B.C. the destination of choice. A new five-year hosting strategy, announced in May 2015, will target the development of sport and cultural events, and a new Tourism Events Program will support and sponsor the planning, marketing and delivery of events and celebrations with high tourism value, resulting in a significant return-on-investment by generating incremental visitations and expenditures.
**Goal 4: Enhancing Competitiveness and Sustainability**

“Adopting policies and undertaking strategic investments to remove barriers and support tourism growth.”

**Strategy**
Increase the competitiveness of British Columbia’s tourism businesses.

**Action**
Government will continue to implement 2013 Liquor Policy Review initiatives that benefit tourism.

The Liquor Policy Review recommendations were crafted to give consumers more choice and British Columbia businesses more opportunity to grow, while ensuring health and safety.

The province will continue to implement these changes; ensuring visitors can enjoy the beverage of their choice at tourism events, encourage touring, and allow the liquor industry greater flexibility to market to tourists at venues such as farmers’ markets and ski hills.

**Action**
Government will continue to reduce red tape and streamline government processes to support the growth and expansion of small businesses in British Columbia’s tourism sector.

The provincial government is rooting out burdensome and unnecessary administrative processes and regulatory requirements. Recognizing that the harder and more expensive it is to do business, the less likely it is that tourism businesses will be able to prosper and deliver innovative, exciting experiences to visitors.

Government is listening to businesses through initiatives like the Small Business Roundtable, and using actions under the Small Business Accord to support this sector.
Government is also seeking input directly from citizens to ensure engagement with government is more efficient through a new Red Tape for Real People initiative.

**ACTION**
Government will focus the B.C. Resort Strategy and Action Plan on enabling the success of existing all-season resorts to ensure British Columbia is a world-class, all-season resort destination.

Mountain resorts are integral to British Columbia’s brand by facilitating visitor experiences in nature. Resorts attract visitors throughout the year by providing winter experiences such as skiing and snowboarding and summer experiences such as hiking and mountain biking.

Almost all mountain resorts in B.C. use Crown land to deliver their products and as such have government-approved master plans for development. In the coming years, Government will encourage and facilitate existing mountain resorts to develop fully the opportunities available in their master plans. This will bolster the quality of British Columbia’s mountain experiences, no matter which resort visitors go to for their vacations.

**ACTION**
Government and Destination BC will monitor and address, as appropriate, new trends affecting tourism such as the sharing economy and emerging technologies.

As new technologies are created, new services are emerging that are creating new marketplaces that allow people to buy goods directly from one another instead of from traditional businesses.

These new services compete with those traditional businesses and beg the question about the need for regulatory responses. The provincial government will examine what role it might play in addressing the challenges associated with the sharing economy as it relates to tourism and travel.

**STRATEGY**
Ease the flow of travellers to, and within, B.C.

**ACTION**
Government will invest in transportation improvements and programs that facilitate tourism growth.

B.C.’s location on the West Coast affords the opportunity for travellers to access the province by all modes of transportation: on roads, water, rails and from the air.

In the past three years, the Province has invested in transportation infrastructure upgrades that benefit tourism such as the new Port Mann Bridge in the Lower Mainland, Nexus lane improvements at border crossings, and new webcams linked to Drive BC. Additionally, new flights have been added to Vancouver International Airport from international destinations such as Tokyo, Paris, London, China, and Iceland.

As outlined in *B.C. on the Move: A 10-year Transportation Plan for BC*, the Province will be investing $2.4 billion to grow the economy, improve safety, maintain and replace aging infrastructure and support trade.

Several initiatives will benefit tourism directly including airport infrastructure, rest area upgrades, a cycling tourism strategy, a new dock at Belleville ferry terminal in Victoria, and innovative technologies to inform drivers about driving conditions.

**ACTION**
Working with B.C.’s tourism industry and provincial and territorial colleagues, government will continue to encourage the federal government to liberalize bilateral air transport agreements and visa policies to increase visitation from emerging markets.

Canada can springboard over our international tourism and trade competitors by maximizing the opportunities that come with greater freedom to travel by air.
The Canadian government has already implemented changes to facilitate travel from visa-required countries, including a transit without visa program, Open Skies-type agreements with 16 countries, and expanded agreements with 20 countries.

Canada’s economy would however benefit from further improvements to air transport agreements and visa policies, particularly those that enable airlines to connect British Columbia with emerging markets on international routings of their choice, and at frequencies that the market would allow. Changes to visa requirements and processing would make new routes viable for airlines and airports, increase a traveller’s ability to transit through the province without a visa, and generally encourage travel.

British Columbia is seeking direct, convenient, affordable air access to and from B.C.’s international markets for tourism, trade, international education, mining and investment attraction.

The province is also seeking simpler and streamlined entry to and through B.C. and Canada for travellers, particularly from our major and emerging trade and tourism markets.

The Province will continue to engage federal ministers on aviation and visitor visa policies and will align efforts with B.C. industry in the coming months.

**STRATEGY**
Enhance Crown land policies to support the needs of nature-based tourism businesses.

**ACTION**
Government will review tenure policies and procedures for nature-based tourism operators related to conflicts between tenured and non-tenured users and greater tenure certainty.

In 2015, at the request of adventure tourism operators, the Province increased the maximum length of terms for adventure tourism leases up to 60 years and for licences of occupation up to 45 years.

In the coming years, government will examine ways in which it might support long-term infrastructure investments by adventure tourism operators as well as the quality of the experiences that operators provide on Crown land. This will include exploring new forms of tenure to provide opportunities for exclusive use by adventure tourism businesses.

**STRATEGY**
Support the development and retention of a strong tourism workforce.

**ACTION**
Government will provide supports to help tourism employers access the skilled workers they need to grow their own businesses, and the industry as a whole.

Industry studies, such as go2hr’s B.C. Tourism Labour Market Strategy, have projected significant shortages in key tourism occupations such as cooks/chefs, food and beverage servers, front desk clerks, restaurant and accommodation managers, and airline services.

Government will continue to offer a range of supports to assist the tourism industry at both the sector and business level. Through investments in secondary and post-secondary training, and initiatives like the Employment Program of BC, Skills for Jobs Blueprint, and the Canada BC Jobs Grant, Government will help current and future workers gain and maintain the skills needed for in-demand jobs.

**ACTION**
Where domestic workers are unavailable, Government will continue to work with the federal industry and the federal government to ensure employers who follow the rules can access temporary foreign workers to fill their labour needs.

The province’s tourism employers are committed to hiring British Columbians and Canadians first for tourism job opportunities. Where this is not possible, some tourism employers may need to turn to temporary foreign workers to meet their labour supply needs.
In 2014, the federal government overhauled the Temporary Foreign Worker Program to stem perceived abuses and ensure Canadians had priority on Canadian job opportunities.

The Province will continue to work with industry and the federal government to mitigate unintended consequences for the tourism sector, and suggest process improvements to assist employers seeking to hire temporary foreign workers.

Additionally, a new immigration stream under British Columbia’s Provincial Nominee Program called Express Entry British Columbia creates a more streamlined pathway to permanent residency for skilled workers from around the world who want to live and work in British Columbia.
Tourism is an important industry for British Columbia and is poised to continue to grow. Many of the province’s key markets understand our reputation as a tourism destination and this offers the opportunity to invest in completing sales rather than educating consumers.

There is enormous potential.

To realize it, all of the province’s marketing efforts and investments must be aligned, from Destination BC’s successful marketing initiatives to supports provided to the tourism industry, regions, communities, and Aboriginal peoples to create, develop and bolster world-class visitor experiences.

Using a whole-of-government approach, B.C. will align policies and make strategic investments to remove the barriers to growth.

By working together, the Province and industry can realize the economic potential of tourism, bringing jobs and prosperity to British Columbians, small businesses and communities in every region of the province.
Appendix

The Tourism System

NATIONAL
Across the Canadian government, various departments and agencies are responsible for policies and programs that affect tourism such as borders, access requirements, security, and international air agreements. The Province of B.C. engages with Industry Canada, Citizenship and Immigration Canada and other responsible agencies to ensure these policies and programs support tourism growth. The federal government tasks Destination Canada with marketing Canadian tourism to the world, receiving $58 million in base funding in 2015/16 to engage in 12 key international markets and conduct marketing research as well as $10 million annually for three years to target the U.S. market. Destination BC often collaborates with the federal Crown Corporation on marketing projects and programs, especially in markets where B.C. is less known by consumers.

PROVINCIAL
The Ministry of Jobs, Tourism and Skills Training provides leadership on governance and policy development, and analysis on opportunities for new partnerships across government so that we can together maximize our collective investment in tourism. The ministry also provides an oversight role for Destination BC.

Several ministries in government directly or indirectly provide services and programs or set policies that affect the experiences of tourists and the operation of tourism businesses.

These ministries’ efforts directly contribute to British Columbia’s tourism reputation and Super, Natural British Columbia™ brand.

The ministries include:

| Ministry of Forests, Lands and Natural Resource Operations | Forest recreation sites and trail management  
Tenures of tourism businesses using Crown land  
Tenuring of mountain resorts on Crown land  
Fish and wildlife allocations and licensing  
Off-road vehicle legislation  
Heritage conservation |
|-----------------------------------------------------------|
| Ministry of Transportation and Infrastructure | Service and attraction signage for travellers  
Highway quality  
BC Ferries oversight  
Airport investment programs  
Air access policy development  
Cycling programs |
| Ministry of Environment | BC Parks management and infrastructure |
| Ministry of Justice | Liquor control and licensing policies |
| Ministry of Community, Sport and Cultural Development | Cultural programs  
Sport hosting programs |
Destination British Columbia takes the lead role for B.C. in tourism development, management and marketing programs in key domestic and international markets, working closely with private sector operators and industry groups, Destination Canada, and B.C. ministries to create an integrated approach. Destination British Columbia is responsible for increasing demand for all tourism products and regions of B.C., to the benefit of the entire industry.

There are several Regional Destination Marketing Organizations (RDMO) within B.C. Each RDMO is registered under the Societies Act and a regional board of directors governs each one. Destination British Columbia contracts the RDMOs to deliver a range of tourism programs in their region, which ultimately benefit communities and tourism businesses.

**Municipalities and Communities**

There are many communities in B.C. marketing themselves as tourism destinations. Some are managed by formal organizations and registered societies while others are managed as parts of Chambers of Commerce or volunteer organizations.

Many receive a portion of their operational funding from the Province in the form of the Municipal and Regional District Tax. Some destinations are marketing a single community while others are marketing a group of communities based on geography, driving routes and other factors relevant to the consumer.

Municipalities also play a critical role in tourism infrastructure, destination development and tourism marketing. The more a community is seen as a good place to live, the more likely it is that it will be seen by travellers as a good place to visit.

Municipalities have responsibility for the quality of parks, roads and other infrastructure within their jurisdictions. They can help grow small businesses by considering the needs of small businesses when crafting policies and practices and making resources accessible.

Many municipalities also work with the local accommodation sector and tourism businesses to manage the Municipal and Regional District Tax to fund tourism marketing initiatives. Fourteen municipalities engage their local tourism sector to manage $10.8 million (2015/16) in Resort Municipality Initiative funding from the provincial government.

**Tourism Businesses**

B.C.’s tourism industry is comprised of over 18,000 tourism-related businesses that have been classified into six categories: accommodation, transportation, recreation and entertainment, travel services, food and beverage, and retail. Within each of the six categories, there are many different types of tourism-related businesses, services and product offerings all working to deliver tourism experiences to the visitor.

Numerous associations, consortiums and product sector organizations represent businesses in the tourism industry. These groups address product development, coordination, cooperative marketing and advocacy to assist tourism operators with their day-to-day business activities.

**Aboriginal Tourism**

Aboriginal tourism represents an opportunity for Aboriginal people to allow the world to experience their traditions, histories and cultures.

Current Aboriginal cultural tourism offerings include tour companies, outdoor adventure operators, art galleries, golf courses, restaurants, wineries, spas, cultural centres, heritage sites, museums, and a variety of accommodations from campgrounds to hotels and resorts. However, the significance of Aboriginal cultural tourism is much broader than tourism alone; it also promotes community economic development, self-sufficient Aboriginal businesses, and the preservation and teaching of Aboriginal languages and cultures.
Quick Facts: Tourism’s Contribution to B.C.’s Economy

ECONOMIC CONTRIBUTION

» 2013 tourism sector revenues were over $13.9 billion dollars, up 3.6% over 2012. This is also a 44.3% increase since 2003.

» Tourism is one of B.C.’s significant export industries, generating $3.2 billion in export revenues in 2013.

» Tourism generated a direct contribution of $7.3 billion to British Columbia’s gross domestic product in 2013, 2.1% higher than its contribution in 2012. The growth in tourism’s GDP was greater than the growth in British Columbia’s overall GDP, which rose by 2.0% last year.

» In 2011, revenue for British Columbia’s Aboriginal cultural tourism was $42 million — double the 2006 revenue for the sector.
JOBS
» The tourism industry employs 132,200 British Columbians or about 4,900 (3.0%) more than it did in 2012, and the first significant employment increase in the industry since 2008. That’s one out of every 15 jobs in our province.

VISITORS
» The number of international visitors travelling to B.C. continues to increase, especially from some of our key markets. International overnight arrivals in 2014 were up 5.3%, from about 4.42 million in 2013 to 4.65 million in 2014; lead by an increase of approximately 99,000 overnight visitors from the United States and 53,000 visitors from China.

» Since Canada was granted Approved Destination Status in June 2009, Chinese visitors to B.C. have increased by about 157%, from 99,686 in 2009 to 256,317 in 2014.

» B.C.’s priority tourism markets include Alberta, Washington State, California, China, Ontario, United Kingdom, Germany, Australia, Japan, and British Columbians travelling in their own province.

» Aboriginal cultural tourism visitation has grown over 97% since 2006. In 2010, 3.7 million visitors participated in an Aboriginal cultural experience.

### EXPORT REVENUES FROM B.C.’S PRIMARY RESOURCE COMMODITIES

- Agriculture and Fish: $2,271 Million
- Energy: $8,085 Million
- Forest Products: $10,159 Million
- Minerals: $3,456 Million
- Tourism: $3,201 Million
A BRIGHT FUTURE
These strong trends have continued into the first quarter of 2015.

» Year-to-date statistics for July 2015 indicate that visitation to British Columbia is up over the same period last year:
  - The total number of international overnight visitors who arrived in British Columbia was 2,843,721, a 8.8% increase over the same period in 2014.
  - U.S. overnight arrivals totalled 1,883,449, a year-to-date increase of 10.7% from B.C.’s biggest market.
  - Overnight visitors from the Asia Pacific region totalled 604,815 in the first seven months of 2015, up about 4.7%.

» According to industry projections\(^1\), the total number of new job openings in the tourism and hospitality sectors by 2022 is projected to be more than 100,000 — that’s 10% of all expected job openings in the province by that year.
Endnotes


2. Source: BC Tourism Industry Performance, Destination BC


9. Source: BC Visitor Centre Statistics Program, Destination BC
https://www.networkstats.tourismbc.com/defaultsecure.aspx


http://www.conferenceboard.ca/hcp/provincial/health.aspx


16. Source: Aboriginal Cultural Tourism Sector Profile, Destination BC

Source: International Visitor Arrivals: December 2014, Destination BC

Source: Aboriginal Cultural Tourism Sector Profile, Destination BC

Source: International Visitor Arrivals, Destination BC

Source: BC Tourism Labour Market Strategy, go2hr
https://www.go2hr.ca/sites/default/files/legacy/reports/go2-TLMS-Detailed.pdf