



Southern Gulf Islands

COMMUNITY TOURISM STUDY

PART 2: STRATEGIC ANALYSIS

Prepared for the Capital Regional District

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1. INTRODUCTION & OVERVIEW

This report is the second component of the Gulf Islands Community Tourism Study, a broad-based research study of tourism on the islands of Salt Spring, North Pender, South Pender, Galiano, Saturna and Mayne. The study is a joint effort by the Salt Spring Island Electoral Area and the Southern Gulf Islands Electoral Area of the Capital Regional District (CRD). The study is intended to:

- Help local governments, residents, and other stakeholders better understand the area’s visitor industry and how it both benefits and impacts the area economically, environmentally and socially; and,
- Recommend potential tools, programs and policies that could be implemented to better manage the visitor industry and ensure that it continues to support and sustain the study area’s unique and rural communities.

The first component of the Community Tourism Study, the Tourism Profile, provided a summary review and inventory of current visitor-related infrastructure, an overview of local visitor market trends, and a preliminary analysis of the general benefits and costs of tourism in the area. The Tourism Profile determined that tourism, or the visitor industry as it is more commonly referred to in this study, is one of the study area’s principal industries and local economic drivers¹. It also confirmed several associated impacts associated with visitor traffic in the Southern Gulf Islands.

The Strategic Analysis builds on the Tourism Profile by outlining several potential visitor management options that could be considered (individually or in different combinations with one another) to help create a more balanced, year-round visitor industry in the study area and to help mitigate the impacts resulting from peak summer activity levels. The Strategic Analysis first outlines how the options were developed and then presents summary overviews of nine short-listed visitor management options.

1.1 Approach

The visitor management options explored in this report were developed by the planning consultant and the project Steering Committee. Collectively, they represent potential tools and strategies that could be used individually or in combination with one another to improve the management of the area’s visitor industry. A list of 21 options were developed by the project consultants and circulated to the Steering Committee for review. Members were also given the opportunity to propose other options.

Based on feedback from the Steering Committee, the list of options was narrowed to nine for further review by the project consultants. The options, were then evaluated against the ranked Community Tourism Goals that were developed by the Steering Committee. Basic direct weights were attached to the Goals (i.e., goal 1 = 1, goal 2 = .95, goal 3 = .9, etc.) so that a relative score could be generated for each of the options. The scores allowed the consultants then to carry out a preliminary ranking of the options. The options analysis by goals table is provided on the following page.

¹ At the request of the project’s Steering Committee, the term ‘visitor’ is used for ‘tourist’ throughout this study. Visitors include recreational property owners who are temporary residents (i.e., “weekenders”) and seasonal residents.

Table: Options Analysis by Goals

OPTIONS	GOALS					RELATIVE SCORE	RELEATIVE RANK
	Protect the environment and enhance natural areas	Foster unique, rural island communities	Improve the effectiveness of tourism management	Support economic diversity and year-round employment opportunities	Distribute tourism benefits and costs broadly		
Visitors Code of Conduct	X	X	X			9.2	3
Visitors Bureau	X	X	X	X	X	15.3	2
Strategic Tourism Plan	X	X	X	X	X	18.0	1
Off-season Events			X	X	X	5.1	8
Water Conservation Program	X					1.0	9
Social Marketing Campaign	X	X	X			6.8	5
Coordinated Marketing	X	X	X	X	X	6.2	6
Buy Local Campaign		X		X	X	6.1	7
Additional Hotel Room Tax	X		X	X	X	8.6	4

After evaluating the options by the community tourism goals they support, a summary technical analysis was carried out where the options were again evaluated using the 20 supporting objectives that were developed by the Steering Committee for each of the goals. Each of the objectives was weighted the same as its overarching goal (i.e., objectives supporting goal 1 received a weight of 1, objectives supporting goal 2 received a weight .95, etc.) so that relative scores could be generated for each of the options. The scores allowed the consultants then to carry out a second ranking of the options. The options analysis by objectives table is provided on the following page.

Table: Options Analysis by Supporting Objectives

OPTIONS	SUPPORTING OBJECTIVES																			OBJECTIVES SUPPORTED	RELATIVE SCORE	RELEATIVE RANK	
	1.1 Conserve, protect and enhance natural areas	1.2 Support low –impact, green visitor activities	1.3 Minimize high impact commercial visitor activities	1.4 Increase awareness of island sustainability issues for visitors	2.1 Facilitate and support home-based business	2.2 Maintain affordability of housing and community for residents	2.3 Protect and maintain Island culture and heritage	2.4 Encourage resident-based economy and home ownership	3.1 Improve and expand local level tourism policies	3.2 Support long-term, strategic visitor planning	3.3 Improve collection, monitoring and evaluation of visitor data	3.4 Link visitor marketing to community development objectives	4.1 Promote and support local arts economy	4.2 Support local agricultural and value-added forestry	4.3 Reduce seasonality of tourism	4.4 Promote employment opportunities on the islands	5.1 Minimize visitor-related economic leakages	5.2 Support development of appropriate commercial accommodations	5.3 Nurture local and regional supply chains and linkages				5.4 Support affordable, short-term rental housing for employees
Visitors Code of Conduct	X	X	X	X		X			X	X	X										10	9.2	3
Visitors Bureau	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X			17	15.3	2
Strategic Tourism Plan	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	20	18.0	1
Off-season Events									X			X	X	X		X		X			6	5.1	8
Water Conservation Program	X																				1	1.0	9
Social Marketing Campaign	X	X	X	X		X			X		X										7	6.8	5
Coordinated Marketing				X		X				X	X			X		X		X			7	6.2	6
Buy Local Campaign					X		X					X	X		X	X		X			7	6.1	7
Additional Hotel Room Tax				X						X	X	X	X	X	X	X	X	X			10	8.6	4

2. VISITOR MANAGEMENT OPTIONS

This section summarizes the nine potential visitor management options assessed by the project consultants. For each option, a brief summary overview is provided along with a table showing the goals and objectives the option would support. Examples of the option in action from other relevant jurisdictions is also provided along with a discussion of the potential phasing, capacity and implementation issues associated with each option.

The visitor management options themselves are presented roughly in the order of their combined ranking. The table below illustrates the relative rankings of the options based on the value analysis (i.e., options evaluated by goals) and the technical analysis (i.e., options evaluated by supporting objectives).

Table: Summary Option Rankings by Goals and Objectives Supported

Relative ranking by Goals supported		Relative ranking by Objectives supported	
1	Strategic Plan	1	Strategic Tourism Plan
	Visitors Bureau		
	Coordinated Marketing		
2	Additional Hotel Room Tax	2	Visitors Bureau
3	Visitor Code of Conduct	3	Visitor Code of Conduct
	Social Marketing Campaign		
4	Off -season Events	4	Additional Hotel Room Tax
5	Buy Local Campaign	5	Social Marketing Campaign
6	Water Conservation Program	6	Coordinated Marketing
		7	Buy Local Campaign
		8	Off-season Events
		9	Water Conservation Program

It should be pointed out that while some options are stand-alone, most would necessarily need to combined with another option or another management activity not considered in this report to be most effective (e.g., coordinated marketing or a social marketing campaign should be part of a larger, overarching strategic marketing plan). The project's final phase of work will be for the Steering Committee to select and package a bundle of options for further development that:

- Island tourism stakeholders would have the capacity to implement;
- Would collectively meet the greatest number of key community tourism goals and objectives, and;
- Would compliment and support each other best in a strategy option or bundle.

2.1 STRATEGIC TOURISM PLAN

Summary Description

Salt Spring Electoral Area and the Southern Gulf Islands Electoral Area together with the Islands Trust and the CRD could jointly develop a *Strategic Community Tourism Plan*. The community-based and community-driven plan would establish an overarching vision for tourism on the Southern Gulf Islands as a whole with sub-visions each individual island. It would also lay out a clear and comprehensive visitor management framework and set policy directions for the Islands Trust and CRD on tourism management in the region. The plan would include island-specific, sub-plans and further support and direct any development of smaller, island-specific or regional sub-sector tourism plans (e.g., agri-tourism, culinary tourism, cultural tourism, etc.).

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.1 Conserve, protect and enhance natural areas
	1.2 Support low-impact, green visitor activities
	1.3 Minimize high impact commercial visitor activities
	1.4 Increase awareness of island sustainability issues for visitors
2. Foster unique, rural island communities	2.1 Facilitate and support home-based business
	2.2 Maintain affordability of housing and community for residents
	2.3 Protect and maintain island culture and heritage
	2.4 Encourage resident-based economy and home ownership
3. Improve effectiveness of tourism management	3.1 Improve and expand local level tourism policies
	3.2 Support long-term, strategic visitor planning
	3.3 Improve collection, monitoring and evaluation of visitor data
	3.4 Link visitor marketing to community development objectives
4. Support economic diversity & year-round employment opportunities	4.1 Promote and support local arts economy
	4.2 Support local agriculture and value-added forestry
	4.3 Reduce seasonality of tourism
	4.4 Promote employment opportunities on islands
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.2 Support development of appropriate commercial accommodations
	5.3 Nurture local and regional supply chains and economic linkages
	5.4 Support affordable, short-term rental housing for employees

Examples

There are numerous examples of successful comprehensive tourism plans and strategies in the region and from abroad. Several notable examples are briefly summarized here.

- San Juan Islands Tourism Management Plan:** In response to growing tourism, San Juan County (whose boundaries are contiguous to the San Juan Islands) embarked upon development of Tourism Management Plan in 1992. The plan was never completed and no current staff members worked on it. According to remaining project materials on file with the County, considerable community engagement was carried out to explore the perceived problems and

benefits of tourism in the county. The planning process did result in the development and review of several policy options. Twelve policy options were recommended and presented to county council. The following table presents the three options that appear to have been implemented and summarizes the outcomes of the policies.

Table: San Juan County Tourism Management Plan Recommendations and Outcomes

Recommended Policy	Implementation Summary/Outcomes
<ul style="list-style-type: none"> - The County should charge and additional hotel/motel tax and expend the resulting funds for the purpose of providing non-promotional tourism information which includes a strong component of the cultural and environmental concerns and aspects of the community 	<ul style="list-style-type: none"> - Additional hotel/motel tax collected - 2% on all accommodations - Funds split 1/3 between San Juan Islands Visitors Bureau , Lopez Island Chamber of Commerce (visitor centre) and Friday Harbour Chamber of Commerce (visitor centre) - In 2006, a total of \$375,000 was raised through tax, an increase of 6.3% over 2005
<ul style="list-style-type: none"> - Tourism should be spread through the year 	<ul style="list-style-type: none"> - Visitors Centre publishes annual marketing plan that supports fall and winter events to shift/spread tourist season - Shoulder and low season events include Artstock Fall Festival of Art, Cycle the San Juans bike tour, Harvest Festival and the Tour de Lopez - 2006 special hotel taxes (a measure of visitor numbers) was up 4% in September and 40% in October
<ul style="list-style-type: none"> - Diversify economy to create more year-round employment and to reduce seasonal impacts of tourism 	<ul style="list-style-type: none"> - Draft Economic Development Strategy released February 2007 - Highlights diversification strategies, including tourism²

- **Downeast Sustainable Tourism Initiative:** In 2003, government and private sector stakeholders of Maine’s Downeast Resource Conservation and Development’s Vacationland Resources Committee established DESTINY 2010, the Downeast Sustainable Tourism Initiative. This award-winning 10-year strategy for sustainable tourism and economic development in Washington and Hancock Counties seeks to establish appropriate, responsible and sustainable development of cultural and nature-based tourism with respect to the region's abundant natural resources and rich cultural heritage. Destiny 2010 was the culmination of a four-year consensus-based process that involved diverse stakeholders in three sustainable tourism conferences and extensive research and planning. A summary of the Destiny 2010 report is provided by Downeast Resource Conservation & Development at <http://www.downeastrcd.com/DESTINY%202010%20Final.pdf>.

² From San Juan County Draft Economic Development Strategy, p. 36 “Community conversation must turn from “do we want tourism” to “how can we make tourism an even more valuable component of our economy.” This is true for two reasons in particular. First, quality of life without tourism will be worse than with. Visitor spending supports a vast number of jobs for “regular people” and contributes significantly to municipal revenues. Second, visitors are going to come whether people want them to or not. Discussions surrounding ecologically -friendly tourism, circulation management and other visitor-generated challenges are healthy and essential.

- **Juneau Tourism Management Plan** In the spring of 2001, the City and Borough of Juneau, Alaska joined together with local stakeholders from the private and public sectors to develop the Juneau Tourism Management Plan. The planning process began with a situation analysis gathered from existing studies, stakeholder and industry meetings, and a broad reaching literature review. Because of the highly charged history of tourism issues in Juneau, city staff spent considerable time and resources to provide ample opportunities for public participation and consultation. This included a series of web polls that helped to establish a collective vision for tourism in Juneau. In addition to establishing a strategic framework for tourism management and institutionalizing partnerships for management, the Plan also devoted significant energy to the mitigation of tourism impacts on the local community, land and resource base. A copy of the complete report can be downloaded from the City of Juneau’s website at www.juneau.org/tourism2/longrange.php.

Phasing, capacity and implementation issues

There are a number of phasing, capacity and implementation issues associated with the development of implementation of a Strategic Tourism Plan for the Salt Spring and Southern Gulf Islands Electoral Areas. These include:

- **Funding:** The development and implementation of a Strategic Tourism Plan can be a costly venture, particularly given the level of community engagement that would be required to support it. Given capacity issues at local Chambers of Commerce and the Islands Trust (i.e., the organizations most likely to lead the planning effort), it is also likely that external consultants would be required to develop the plan which introduces another level of cost to the option. While planning costs would vary by the scope of the work, it is estimated that such a plan could cost between \$100,000 and \$200,000. While some provincial funding avenues exist, raising such funds would likely be time consuming and difficult.
- **Plan area and players:** For the plan to be effective, it would cover both the Salt Spring and Southern Gulf Islands Electoral Areas. Given the differences between the islands (in terms of tourism numbers, access, infrastructure and services, community support for tourism, etc.) the planning process would necessarily have to actively involve stakeholders from all of the islands and include integrated ‘sub-plans’ for each island. A one-size-fits-all tourism plan for all of the islands would not work.
- **Implementation and governance:** There are multiple jurisdictions (CRD, Islands Trust) and ongoing governance initiatives (i.e., the potential of Salt Spring becoming an island municipality) that would need to be considered and coordinated with.
- **Planning fatigue:** There have been a number of recent tourism-related initiatives and studies (this study, Draft Tourism Strategy, Tourism Forum, etc.) on the islands which combined with other recent and ongoing planning initiatives (e.g., North Pender OCP review, Salt Spring OCP review, Southern Gulf Islands National Park Reserve planning, etc.) there may be mixed appetite for another tourism-planning effort. There may also be resistance from some stakeholders who neither perceive the need for such a tourism management plan, nor feel that “another plan” is the most effective way of improving tourism management in the area.

2.2 VISITORS BUREAU

Summary Description

Salt Spring Electoral Area and the Southern Gulf Islands Electoral Area could jointly implement and fund a Gulf Islands Visitors Bureau or Visitors Centre to cooperatively and strategically market tourism in the area. Functioning as more than a basic destination marketing agency, it would, among other tasks:

- research, facilitate and advocate for appropriate, community-based tourism in the Gulf Islands;
- collect, monitor and evaluate visitor data;
- participate in and help facilitate island and inter-island visitor management activities, and;
- work with business, community and local government stakeholders to minimize tourism-related impacts on the islands.

The organization would also help support and coordinate the ongoing operation of the smaller visitor information centres currently operating in the study area.

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.1 Conserve, protect and enhance natural areas
	1.2 Support low-impact, green visitor activities
	1.3 Minimize high impact commercial visitor activities
	1.4 Increase awareness of island sustainability issues for visitors
2. Foster unique, rural island communities	2.1 Facilitate and support home-based business
	2.3 Protect and maintain island culture and heritage
3. Improve effectiveness of tourism management	3.1 Improve and expand local level tourism policies
	3.2 Support long-term, strategic visitor planning
	3.3 Improve collection, monitoring and evaluation of visitor data
	3.4 Link visitor marketing to community development objectives
4. Support economic diversity & year-round employment opportunities	4.1 Promote and support local arts economy
	4.2 Support local agriculture and value-added forestry
	4.3 Reduce seasonality of tourism
	4.4 Promote employment opportunities on islands
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.2 Support development of appropriate commercial accommodations
	5.3 Nurture local and regional supply chains and economic linkages

Examples

While the majority of visitors bureaus and centres tend to be focused solely on destination marketing and basic promotions, there are examples of more progressive organizations that have expanded their mandate to include the support and facilitation of more appropriate and sustainable community tourism options. Two notable examples are briefly summarized here.

- **Oliver Visitors Centre:** The self-proclaimed ‘Wine Capital of Canada’, has adopted a community-based approach to tourism development and management. Housed in restored train station, Oliver’s Visitor Centre is funded by the District Chamber of



Commerce and the Oliver & District Community Economic Development Society. In addition to providing general visitor information services, centre staff includes a Tourism Coordinator Assistant who is tasked with providing strategic tourism marketing services, tracking local tourism trends and impacts, and helping develop and implement tourism policies with the Chamber of Commerce, Regional District and Town of Oliver that help support and protect the town's rural, agricultural character. In Oliver, tourism has been used as a vehicle to allow visitors to experience Oliver as the community it has always been: one based on farming and agriculture.

- **San Juan Islands Visitors Bureau:** The San Juan Islands Visitors Bureau (SJIVB) was organized in 1999 when islands businesses determined a need for active, cooperative marketing. At that time, the County's Visitor Information Service organization was only allowed to respond to visitor inquiries rather than actively promote the islands to visitors. Supported by a 2% "special" hotel/motel tax, the mission of non-profit organization is to enhance the County's local economic prosperity "while respecting and sustaining the Islands' unique and diverse ecosystems, environments, lifestyles and cultures." It is further guided by the following goals:



- To help strengthen San Juan County's year-round economy
- To foster an appreciation of San Juan County's maritime and rural ways of life, as well as its history, arts and culture
- To communicate San Juan County's environmental stewardship message to all visitors
- To enhance visitors' travel experiences county wide

The Visitors Bureau measures their marketing efforts in nine categories: 1) County hotel/motel tax receipts, 2) County hotel/motel tax receipts broken down by island, 3) Town of Friday Harbor hotel/motel tax receipts, 4) a comparison of hotel/motel tax receipts from nine regional counties, 5) website unique visits, 6) phone calls, 7) e-mail requests, 8) surveying callers and e-mailers on how they heard about the San Juan Islands, and 9) monthly lodging occupancy data.

- **Bowen Island Community and Visitors Information Centre:** The Bowen Island Community and Visitors Information Centre, provides information to residents and visitors on travel and tourism opportunities both on Bowen Island and across British Columbia. The Information Centre, established in 2004 through a partnership between the Chamber of Commerce, the Municipality of Bowen Island, and Human Resource Development Canada "is a place where Bowen residents can get information for planning a vacation in BC from the guidebooks and accommodation guides for virtually every area of the province, learn more about the businesses on Bowen or find business advice". Each year the Centre distributes the Bowen Island Guide, a guide for visitors to Bowen Island that can also be found in information kiosks throughout the province, including on all BC Ferries southern routes. The 2008 Bowen Island Guide's theme is sustainability.



Phasing, capacity and implementation issues

There are a number of phasing, capacity and implementation issues associated with the development of implementation of a Visitors Bureau for the study area. These include:

- **Funding:** An effective and efficient Visitors Bureau would operate year-round and require a minimum of one full-time staff person supported by additional part-time staff during peak

visitor seasons or to undertake larger projects and initiatives. Typically, such centres are supported financially and sometimes administratively by existing organizations (e.g., Chambers of Commerce, local business associations, etc.) and/or local governments. In many cases, including the San Juan Visitors Centre, they are supported by an Additional Hotel Room Tax.

- **Coordination with multiple governments and organizations:** To be effective, a Visitors Bureau would have to work closely with existing island Chambers of Commerce, the Islands Trust, CRD and other tourism stakeholders, including BC Ferries, Parks Canada and Tourism BC.
- **Organization and operating values:** To be effective and to support the sustainability goals of the study area, the Visitors Bureau would operate as strategic marketing agency, not as a basic promotional agency and general tourist information centre. Its operating mission and values would need to be aligned with the Islands Trust Policy Statement and the principles of community tourism brought through in this research study.

2.3 VISITOR CODE OF CONDUCT

Summary Description

Working together, the CRD and Islands Trust could jointly develop a *Visitor Code of Conduct* to be included in local visitor guides, as a stand-alone pamphlet on ferries and at air lines serving the islands, and on outdoor signs at points of entry (i.e., ferry terminals), etc. Visitor codes are used to help persuade visitors to play an active and positive role in protecting the physical environment of the host community and to engage sympathetically with the host community. Such codes are useful tools for informing visitors about host community concerns and goals related to tourism. They are fairly common and generally provide advice that encourages visitors to:

- respect local values and traditions;
- consider the privacy and practices of the host communities;
- support the local economy by buying local goods and services;
- contribute to local conservation efforts;
- conserve and preserve the natural environment, its ecosystems, and wildlife;
- use energy and water efficiently; and,
- dispose of waste properly.

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.1 Conserve, protect and enhance natural areas
	1.2 Support low-impact, green visitor activities
	1.3 Minimize high impact commercial visitor activities
	1.4 Increase awareness of island sustainability issues for visitors
2. Foster unique, rural island communities	2.3 Protect and maintain island culture and heritage
3. Improve effectiveness of tourism management	3.2 Support long-term, strategic visitor planning
	3.4 Link visitor marketing to community development objectives

Examples

The Islands Trust has developed a partial visitors code which is posted on signs at the Tsawwassen and Swartz Bay ferry terminals. While the existing code does cover key tourism issues, it is not disseminated and the existing signage is very poorly placed and likely not very effective. Still, the guidelines are an excellent start to developing a broader code or guidelines.

There are many other examples of visitors guidelines and codes locally, regionally and internationally. Two local examples include Savary Island, BC and the San Juan Islands in Washington State.

- **Savary Island:** Savary Island is an ecologically sensitive island located off the village of Lund on the Sunshine Coast. The Savary Island Land Trust published a visitor code of conduct called *Savary Island Stewardship: A Visitors Guide*. The well-designed pamphlet is available in all shops, stores and visitor-serving businesses in Lund (the departure point for Savary Island) and other visitor information centres and



services in the Powell River/Sunshine Coast area. Copies are also available on BC Ferries serving the area. The pamphlet includes a map that clearly identifies fragile ecosystems on the island, clearly lays out visitor guidelines and provides information on the island’s rare and endangered dune and dune meadow ecosystems.

- San Juan Islands:** The San Juan Islands Visitors Bureau worked with 18 stakeholder groups, including Chambers of Commerce, federal and state government agencies, first nations and local environmental organizations to develop a visitor code of conduct called “Leave only footprints”. The code identifies ten principles it asks visitors to respect when visiting the islands. The document is included on the back page of the Visitors Bureau annual Visitors Guide which reaches a large audience. A stand-alone brochure is also distributed around the county at locations frequented by visitors including the San Juan Islands’ three visitor centres, commercial accommodations, stores and on the Washington State Ferries that serve the islands.



Phasing, capacity and implementation issues

While a visitor code of conduct is generally relatively simple to produce and disseminate, there are a number of phasing, capacity and implementation issues to be considered. These include:

- Organizing and implementing agency:** With no clear agency or authority responsible for tourism management in the study area, a lead agency or organization would need to be identified and tasked with the responsibility for developing the code and making sure that it is made widely available. The Islands Trust would be the logical organizing agency, but the development of the code itself should involve a wide range of community tourism stakeholders, as was the case in the San Juan Islands.
- Dissemination:** Any visitor code or visitor guidelines need to be made widely available to be effective. There are a number of relatively cost effective ways to disseminate a visitors code, such as including it with island visitor guides, making a stand-alone pamphlet to be distributed to commercial accommodation providers on the islands, at existing visitor centres, at BC Ferry terminals and on board island-serving ferries. Poster-sized versions could also be printed for businesses, schools and local government offices to display. The code could also be made available online for businesses and other groups to post on their websites. A coordinated signage program should also be considered for ferry terminals and key public areas.
- Cost:** While the development of the code would likely be fairly inexpensive, publishing and distributing it would not be. Sharing development costs with community tourism stakeholders involved in the development of the code should be considered.

2.4 ADDITIONAL HOTEL ROOM TAX

Summary Description

Working with the CRD, Salt Spring Electoral Area and the Southern Gulf Islands Electoral Area could each implement an Additional Hotel Room Tax. Revenues from the tax could be ‘pooled’ or coordinated to support region-wide (i.e., both Electoral Areas) strategic visitor marketing efforts, projects and programs.

In BC, a Hotel Room Tax (HRT) of 8% applies to all short-term (less than one month) commercial accommodations sold by operators who offer four or more units of accommodation. The HRT is charged on the full purchase price, which is the total amount a guest pays for the accommodation plus any additional charges (beds, cribs, linens, pets, etc). Provincial legislation allows for an additional surtax of 2% to be charged on the HRT. Revenues from the so-called Additional Hotel Room Tax (AHRT) are required to be used "*tourism promotions, projects and programs*" in the region they are generated.

Based on BC Stats Room Revenue Data for 2006, it is estimated that the Southern Gulf Islands and Salt Spring Island Electoral Areas generated HRT revenues of over \$830,000 in 2007 (Source: BC Stats, CRD, BC Tourism, 2008). For the study area, it is estimated the AHRT could generate approximately \$200,000 annually to support local visitor services, projects and programs. Over half of the AHRT would be raised by commercial accommodations on Salt Spring Island.

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.4 Increase awareness of island sustainability issues for visitors
3. Improve effectiveness of tourism management	3.3 Improve collection, monitoring and evaluation of visitor data
	1.4 Link visitor marketing to community development objectives
4. Support economic diversity & year-round employment opportunities	4.1 Promote and support local arts economy
	4.2 Support local agriculture and value-added forestry
	4.3 Reduce seasonality of tourism
	4.4 Promote employment opportunities on islands
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.2 Support development of appropriate commercial accommodations
	5.3 Nurture local and regional supply chains and economic linkages

Examples

Currently, 37 municipalities and districts in BC charge an additional 2% tax on accommodations. This Additional Hotel Room Tax (AHRT) is intended to generate revenues that assist municipalities and regional districts in financing and operating new tourist facilities and with tourism promotion. In the Capital Regional District, the communities of Victoria, Saanich, and Oak Bay all charge the AHRT.

Phasing, capacity and implementation issues

There are a number of phasing, capacity and implementation issues to be considered with an Additional Hotel Room Tax. Some of these pros and cons are summarized in the table on the following page.

Table: Pros and Cons of the AHRT

Pros	Cons
<ul style="list-style-type: none"> - Would generate sufficient funds to support development of several options outlined in this analysis (e.g., Gulf Islands Visitors Bureau, Strategic Tourism Plan, Off Season Events, etc.) 	<ul style="list-style-type: none"> - Targets a specific visitor group (i.e., those people staying in commercial accommodations <4 rooms) and therefore isn't equitably distributed amongst all visitor types
<ul style="list-style-type: none"> - Creates stable funding source to support other tourism projects and programs that would help maximize the benefits of tourism in the Gulf Islands while minimizing the impacts. 	<ul style="list-style-type: none"> - Adds additional cost to the price of larger (<4 rooms) commercial accommodations and may not be supported by these commercial accommodation providers.
<ul style="list-style-type: none"> - Provides source of tourism data specific to Gulf Islands including occupancy rates, receipts, rates, seasonal use, etc. 	<ul style="list-style-type: none"> - The majority of commercial accommodations on the islands, including small B&Bs and cottages, would not have to charge the AHRT because of their size.
	<ul style="list-style-type: none"> - Salt Spring Island would generate the majority of AHRT revenues which may create questions around how the tax should be pooled and/or spent (i.e., should it be spent in proportion to the amount raise by island?)
	<ul style="list-style-type: none"> - Potential challenges administrating tax in two different Electoral Areas
	<ul style="list-style-type: none"> - General reluctance to introduce "another tax" – people are feeling taxed out
	<ul style="list-style-type: none"> - Creates additional work for commercial accommodations charging the AHRT.

2.5 SOCIAL MARKETING CAMPAIGN

Summary Description

A community-based social marketing campaign could be developed to support more sustainable behaviour choices by both visitors and residents (e.g., “*We are all visitors. Please conserve, respect and enjoy peacefully*”). Social marketing involves the application of commercial marketing principles and other social change techniques to achieve specific behavioural goals for a social good. It is used primarily in health, safety and conservation contexts to inform government policy and influence individual behaviours. As opposed to a separate social marketing campaign, it is likely that a social marketing component would be combined with any strategic marketing actions undertaken on in the study area to ensure that messaging on island stewardship and sustainability are included in visitor marketing materials (e.g., Visitors Code of Conduct).

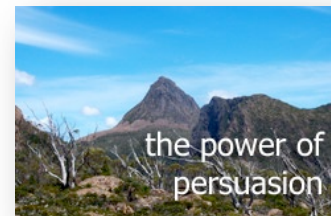
Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.1 Conserve, protect and enhance natural areas
	1.2 Support low-impact, green visitor activities
	1.3 Minimize high impact commercial visitor activities
	1.4 Increase awareness of island sustainability issues for visitors
2. Foster unique, rural island communities	2.3 Protect and maintain island culture and heritage
3. Improve effectiveness of tourism management	3.2 Support long-term, strategic visitor planning
	3.4 Link visitor marketing to community development objectives

Examples

There are examples of successful social marketing campaigns for health and environmental issues (e.g., the former One Tonne Challenge, anti-smoking campaigns, etc.). Increasingly, social marketing is being used to help change the behaviour of tourists in some destinations. While stand-alone social marketing campaigns are less common in the tourism field, social marketing approaches are being increasingly integrated into conventional destination marketing strategies.

- Promoting Persuasion, Western Australia National Parks:** The Sustainable Tourism Cooperative Research Centre, a federal level research centre, carried out a study of nuisance problems in national parks in Western Australia. After their research showed that a simple lack of understanding on the part of visitors was underling many of the management issues in protected areas in Australia, a social marketing campaign was integrated with regular park marketing (e.g., brochures, on-line) and expanded on-site through a signage program designed to educate visitors about proper park behaviour. The approach led to a noticeable reduction in littering and other nuisance problems in national parks in the region.



Phasing, capacity and implementation issues

The integration of social marketing methods into existing marketing or the development of a stand-alone campaign raises a number of phasing, capacity and implementation issues. These include:

- **Coordination with other marketing:** As already mentioned, social marketing should not be considered as a stand-alone option for the study area. Rather, its messaging approach and methods could be incorporated with more conventional strategic destination marketing. This would help ensure that such major community-tourism themes as island stewardship and sustainability, water conservation and supporting local economic development be part of the Gulf Islands 'brand'.
- **Responsible/Organizing Agency:** Consistent and coordinated messaging is crucial to social marketing. Because of this, it is critical that one agency or organization lead and manage the integration of any social marketing approach into more conventional marketing campaign or component.
- **Partnerships:** There is already a precedent of social marketing in the islands with such groups as the Mayne Island Integrated Water Systems Society. Local stewardship and environmental groups should be involved in the development and implementation of any social marketing campaign.

2.6 COORDINATED MARKETING WITH MAJOR TOURISM STAKEHOLDERS

Summary Description

The Islands Trust, Chamber of Commerce or other visitor agencies in the study area could work cooperatively with major regional tourism stakeholders such as BC Ferries and Parks Canada to strategically market the study area and to disseminate or ‘piggy back’ marketing information and marketing materials using the stakeholders’ additional capacity.

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.4 Increase awareness of island sustainability issues for visitors
2. Foster unique, rural island communities	2.3 Protect and maintain island culture and heritage
3. Improve effectiveness of tourism management	3.3 Improve collection, monitoring and evaluation of visitor data
	3.4 Link visitor marketing to community development objectives
4. Support economic diversity & year-round employment opportunities	4.3 Reduce seasonality of tourism
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.3 Nurture local and regional supply chains and economic linkages

Examples

To be cost effective and efficient, coordinated marketing strategies need to take advantage of available distribution streams to ‘get the message out’. While local tourism stakeholders like BC Ferries and Parks Canada are already involved in local destination marketing and the dissemination of visitor information, they could be involved more effectively and cooperatively and used to help better advance community tourism goals and objectives. Existing co-marketing efforts are summarized below.

- BC Ferries:** BC Ferries makes local marketing products available on ferries serving the region and has developed several, themed sample visitor itineraries that include the Gulf Islands. BC Ferries website also includes a local events listing and a listing of local commercial accommodation providers and visitor services/attractions with links to the businesses. Their website also provides community profiles of all the islands with links to community and local travel websites. More recently, BC Ferries partnered with the federal and provincial agencies, the Islands Trust, Malaspina University College and other local partners on the Waterscape Project, an education and awareness program to protect and conserve water on the Gulf Islands. A large project overview information board that illustrates the threats to the sensitive Gulf Islands water cycle has been installed on two ferries serving the Gulf Islands. The community profiles provided by BC Ferries could include messaging on environmental and stewardship goals in the Gulf Islands and/or promote community tourism objectives.
- Parks Canada:** Parks Canada operates and manages the Gulf Islands National Park Reserve. This large park attracts several thousand non-resident and resident visitors annually. Their website offers limited information on commercial visitor activities and services in the Gulf Islands, but

does provide links to local community organizations (e.g., Chambers of Commerce) and visitor information services. Some information is also available at the park office in Sidney. Their web site could, for example, do a better job explaining how the preservation and stewardship values promoted in the park area carry over into the island's communities.

Phasing, capacity and implementation issues

The key phasing, capacity and implementation issues associated to effectively coordinate and link marketing efforts with major tourism stakeholders include:

- **Planning requirements:** Effectively coordinating strategic marketing efforts with BC Ferries, Parks Canada and other major regional tourism stakeholders requires a cooperative marketing strategy for the Gulf Islands (i.e., a Marketing Strategy). Target audiences, key messages and collective objectives must first be established to ensure that the effort is coherent and efficient.
- **Understanding and respecting partner limitations and/or requirements:** Prior to developing a strategy, it is important to first understand what BC Ferries and Parks Canada can and cannot do in terms of marketing. For example, Parks Canada may be limited by federal statute and policies as to the kinds of marketing information they can make available either on line or through Southern Gulf Islands National Park Reserve materials. The same is true with BC Ferries. Once (and if) a collective Marketing Strategy is developed for the Southern Gulf Islands, it will be important to meet early with marketing representatives from both BC Ferries and Parks Canada to determine how and when they will be able to assist in helping implement the strategy.

2.7 BUY-LOCAL CAMPAIGN

Summary Description

The Salt Spring Electoral Area, Southern Gulf Islands Electoral Area and local Chambers of Commerce (Salt Spring, Galiano, Penders) could work together to develop and implement a regional ‘Buy Local’ program or campaign. The campaign would direct residents and visitors to locally-made products and services to minimize economic leakages and to nurture local supply chains and linkages. Common ‘Buy Local’ campaign goals include:

- Providing information to their communities about the benefits of supporting local businesses;
- Helping shape policies that support local enterprise development;
- Establishing a ‘locally owned’ brand that can successfully compete with non-local products and services; and,
- Engaging citizens in shaping the local economy of their community and region.

Goals and Objectives Supported

Goals	Objectives
2. Foster unique, rural island communities	2.1 Facilitate and support home-based business
	2.3 Protect and maintain island culture and heritage
4. Support economic diversity & year-round employment opportunities	4.1 Promote and support local arts economy
	4.2 Support local agriculture and value-added forestry
	4.4 Promote employment opportunities on islands
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.2 Support development of appropriate commercial accommodations
	5.3 Nurture local and regional supply chains and economic linkages

Examples

There are numerous examples of successful ‘Buy Local’ campaigns locally, regionally and internationally. Several regional examples are summarized below.

- **Buy BC:** Launched in 1993, the Buy BC program has been the most successful food and beverage initiative ever jointly undertaken by the provincial government and private industry. There are now over 1,200 companies and associations using the Buy BC logo in their advertising and promotional materials and over 5,000 Buy BC products identified at major grocery retailers throughout the province. The Buy BC program has been very successful at increasing consumer awareness of BC products and helping consumers identify them in store – consumer recognition of the Buy BC logo is now over 75%. Further information can be found at www.bcac.bc.ca/buybc/.
- **Buy Local Portland:** This “buy local” campaign was established in 2006 through a partnership of 20 businesses in the downtown core of Portland, Oregon. As of 2008, it has over 150 members and includes participation from local government and other non-profit organizations that seek to:
 - Support locally owned, independent businesses in Portland;
 - Maintain Portland's unique community character;



- Provide continuing opportunities for entrepreneurs;
- Build community economic strength; and,
- Prevent the displacement of community-based businesses by national and global chains.

Activities the campaign is currently undertaking include information and sensitization programs for citizens, group branding and advertising for community-based businesses, and nurturing government-private sector partnerships that support sustainable local economic development. Further information about Buy Local Portland can be found at www.portlandbuylocal.org.

- **Think Local First:** Think Local First is a “buy local” campaign in Bellingham and Northwest Washington that seeks to increase consumer awareness about the community and economic benefits of choosing local and independently-owned businesses for their products and services. Established in 2003, “Think Local First” now has over 500 participants displaying the campaign logo. In 2008, the program created a “Where Locals Go” coupon book that provides discounts to over 250 local businesses. It is fully funded through its sale (\$10) at various locations throughout the region. Further information can be found at www.sconnect.org/thinklocal.



Phasing, capacity and implementation issues

There are a number of phasing, capacity and implementation issues associated with the development and/or implementation of a Buy Local Campaign. These include:

- **Cost:** Establishing a campaign requires a budget to coordinate partners, establish the local brand and provide advertising and marketing to the consumer base. In most cases these costs are incurred by participating businesses, local business groups and/or the local government. If costs of participation are too high for small businesses to afford, the program may lose support over concerns of unfair competition.
- **Authenticity:** Establishing criteria to define what constitutes a “local” product and ensuring that all branded products meet the requirements can create a capacity challenge for the implementing institution. Sound strategic planning and collective decision-making when developing the program will help to account for these issues. However, this requires additional resources and participation.

2.8 OFF-SEASON EVENTS

Summary Description

The Salt Spring Electoral Area, Southern Gulf Islands Electoral Area and local Chambers of Commerce could work together to create and develop off-season events to reduce seasonality of tourism and/or to expand existing shoulder season events. These events would not necessarily be developed to attract new visitors, but to help ‘spread out’ existing visitors through the season or through the islands.

Goals and Objectives Supported

Goals	Objectives
3. Improve effectiveness of tourism management	3.2 Support long-term, strategic visitor planning
4. Support economic diversity and year-round employment opportunities	4.1 Promote and support local arts economy
	4.2 Support local agriculture and value-added forestry
	4.3 Reduce seasonality of tourism
5. Distribute tourism benefits and costs broadly	5.1 Minimize visitor-related economic leakages
	5.3 Nurture local and regional supply chains & linkages

Examples

There are numerous examples of successful off-season events regionally and internationally. Several regional examples are summarized below.

- San Juan Islands:** The ArtStock Fall Festival of Art has grown to become one of the largest festivals on the islands. A relatively new Harvest Festival has also been developed to support the islands growing specialty agricultural producers and to take advantage of growing interest in culinary tourism. The San Juan Islands Visitors Bureau has also begun to promote Valentine’s Day getaways to the Seattle market to help attract visitors to the islands on what is traditionally the slowest month of the year.
- Pacific Rim Whale Festival:** The Pacific Rim Whale Festival is a series of annual public events and festivities in Ucluelet and Tofino, BC. The March festival was established in 1986 to celebrate the Pacific Grey Whales' migration to the Arctic and features activities such as whale watching, environmental lectures and talks, First Nations cultural programs, and community fundraisers. The Festival draws hundreds of off-season visitors to the region while promoting a sustainability and conservation ethic to tourists and visitors alike. Further information can be found at www.pacificrimwhalefestival.org.
- Bowen Island Fall Food Festival:** The Bowen Island Fall Food Festival is a partnership of local businesses and government to support community causes through the promotion of local cuisine and eating establishments. The November event promotes weekly restaurant specials, a community dinner and art exhibit, a festival gala, and a final event that pairs local chefs together for a renowned 8-course meal. The proceeds from the 2007 event provided funding for the Bowen Island Youth Centre. Further information can be found at www.bowenfallfoodfestival.com.



Phasing, capacity and implementation issues

There are a number of phasing, capacity and implementation issues associated with the development of off-season events in the study area. These include:

- **Coordination and Participation:** In the case of the Gulf Islands, an off-season event may provide benefits to one island only, unless a coordinated approach is taken to include all islands in the activities. In such cases, a coordinating institution would be required that could bring together stakeholders from each of the distinct island communities in collective decision-making.
- **Distributing Benefits:** Ideally, an event that integrates all of the Gulf Islands into its activities would be preferred so as to promote the uniqueness and diversity of each of the islands as in the same initiative. However, each island has varying degrees of infrastructure to support different program options. Consideration may need to be given to establishing numerous island-specific events, which would then require additional costs and resources.

2.9 VISITOR WATER CONSERVATION PROGRAM

Summary Description

The Islands Trust, CRD and local Water Improvement Districts could work collectively to develop and implement a coordinated islands-wide Visitor Water Conservation Program.

Goals and Objectives Supported

Goals	Objectives
1. Protect the environment and enhance natural areas	1.1 Conserve, protect and enhance natural areas

Examples

There are numerous examples of successful water conservation campaigns locally, regionally and internationally. Several regional examples are summarized below.

- **Penticton WaterTalk Program:** WaterTalk is produced by the City of Penticton to promote sustainable water-use and to educate customers about water-related legislation, programs, projects, and services. Published every spring and fall, WaterTalk is part of an Okanagan-wide initiative supported by the province and more than 15 other water utilities. Further information on WaterTalk can be found at www.penticton.ca/city/public_works/water/.
- **Cochise Country Hospitality Water Conservation Program:** This Arizona program works with local hospitality businesses to promote water conservation in their business practices while informing visitors of the need to minimize the use of water during their stay. Established by the county government's water conservation department, the program asks participating businesses to:
 - Provide tent cards in hotel and motel rooms that inform visitors of the need to conserve water resources;
 - Involve employees in water conservation as part of their business plans;
 - Consider water use factors when purchasing equipment for operations;
 - Allow confidential reviews of their water use by university and government researchers; and,
 - Share historical and future water use data with the County to the measure success of the program

For further information, go to <http://www.co.cochise.az.us/Water/hospitality.html>.

- **Resource Guide for Sustainable Tourism:** This tourism resource guide was designed to provide tips and information resources about ways for tourism businesses to become more environmentally friendly without hindering the success of their businesses. The goal of the project is to encourage coastal and interior tourism businesses in the Gulf of Maine and Bay of Fundy region, New Brunswick, to “become more sustainable, help protect their region’s abundant assets, and help distinguish the region as a top global destination for visitors looking for an environmentally friendly, culturally sensitive, and enjoyable experience”. Included in the guide is a significant chapter on best practices, resources, and context information for water conservation in the region. A copy of the guide is available through the Maine Sea Grant website at www.seagrant.umaine.edu/documents/pdf/07RG.pdf.

Phasing, capacity and implementation issues

While the Southern Gulf Islands status as a water-poor area has already resulted in the establishment of some water conservation initiatives, there are a number of phasing, capacity and implementation issues to consider in order to expand visitor water conservation programming across the Gulf Islands. These include:

- **Participation and Coordination:** Establishing a visitor water conservation program requires the coordination of numerous stakeholders including government, businesses, community groups and consumers. Ensuring their active participation requires a coordinating organization with the capacity and resources to manage and implement program activities.
- **Cost:** Visitor water conservation programs can be costly. Funding is required for planning and coordination, the development of education and sensitization materials, monitoring programs, and in some cases, further research. In some cases, programs can be funded through participant donations but often require external funding to get off the ground.
- **Available data:** Up-to-date and accessible data must be available to support monitoring, planning, and decision-making for the program. If information is not readily available, the costs of the program could increase substantially.