



TourismBC

# EXPERIENCES BC POWER AND SAIL CRUISE SECTOR SECTOR DEVELOPMENT STRATEGY

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Ministry of Jobs, Tourism and Skills Training,  
Tourism BC Representative:  
Heather Boyd  
(604) 660-3564  
[Heather.Boyd@gov.bc.ca](mailto:Heather.Boyd@gov.bc.ca)

Tourism BC Facilitator:  
Jennifer Nichol  
Grant Thornton LLP  
(604) 443-2146  
[Jennifer.Nichol@ca.gt.com](mailto:Jennifer.Nichol@ca.gt.com)

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## Executive Summary

This executive summary presents highlights from the Power and Sail Cruise Sector Tourism Development and Marketing Plan, which was developed through the Experiences BC program of Tourism British Columbia, as part of the Ministry of Jobs, Tourism and Skills Training. The Power and Sail Cruise Sector Tourism Development and Marketing Plan was created with input from a provincial sector Steering Committee, in addition to over 100 sector stakeholders along BC's coast.

### Background

The BC coast offers outstanding opportunities for power and sail cruising and currently attracts visitors from several key markets. However, in terms of formalized, collaborative tourism product development and marketing, the sector is not developed. There is strong interest by stakeholders associated with power and sail cruising in BC to formalize the sector and conduct coordinated, effective tourism product development and marketing to capitalize on the significant opportunities the coast presents. In response to this situation, key stakeholders formed a Provincial Steering Committee in March, 2012, to lead the development of this Sector Tourism Plan through the Experiences BC Program.

### Sector Definition

The BC power and sail cruise sector includes cruising by powerboat or sailboat anywhere along the BC coast. Other attributes that define the sector are as follows:

- Cruising or sailing is the main purpose of the activity (as distinct from fishing being the main purpose of the boating activity)<sup>1</sup>;
- The sector includes private recreational boaters (transient), bareboat charters and guided charters; and,
- The sector does not include pocket cruises, cruising on large cruise ships and companies that primarily offer fishing charters.

The typical experience involves visiting multiple marinas and/or harbours, usually over the course of one or more nights and often over several weeks.

### Key Learning and Findings from Situation Analysis

The Situation Analysis which was developed to support the planning process for the power and sail cruise sector offered the following insights.

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<sup>1</sup> This does not mean that visitors participating in power and sail cruising will not fish or participate in other activities while on their cruising vacation; rather, it means that the main reason for their trip is for the actual power/sail cruising experience, which may involve other activities as well.

**BC's coastline offers outstanding natural assets that support power and sail cruising,** including: exceptional scenery, 450 kilometers of protected water, 20,000 kilometers of coastline, intact wildlife populations and ecosystems, wildlife diversity, an abundance of islands, many marine parks/ protected areas, beaches and clean water. These natural assets are supported by cultural attractions, communities, boating infrastructure and services and a range of land-based tourism activities to complement boating. Future marketing efforts should focus on building awareness about and promoting these outstanding assets.

**Currently, stakeholders in the power and sail sector operate independently.** There is very little, if any, coordination with regard to **tourism**, including sharing information, setting sector standards, coordinating tourism marketing activities and addressing issues that are of collective concern to the sector.

**Future efforts to coordinate the tourism development and marketing of the power and sail cruise sector must recognize that the BC coast offers considerable diversity** with regard to:

- The coastal settings within which people participate in power and sail cruising;
- The scale of marinas, docks and other facilities and services available to visitors; and,
- The types of products and experiences available for visitors.

Tourism product development and marketing efforts must recognize this diversity and ensure that we are marketing the “right” product to the “right” markets at the “right” time. At the same time, while this diversity exists, there is a common interest to:

- Enhance awareness about the entire BC coast as an exceptional power and sail cruising destination: and,
- Collectively address issues that affect the sector as a whole.

**Given the outstanding assets and the current lack of coordination noted above, there is a significant opportunity to coordinate the sector and enhance the overall competitiveness of BC as a world-class power and sail cruise destination.** In turn, this presents opportunities to increasing power and sail visitation and spending in BC, particularly in areas where and seasons when excess capacity exists.

**Very few jurisdictions have sector organizations that coordinate product enhancement, communication and marketing for power and sail cruise.** The absence of many such organizations also suggests that BC could gain a competitive advantage over other coastal destinations by establishing an effective power and sail cruise tourism sector organization.

**Other tourism sectors in BC that have realized success through the Experiences BC program have several factors in common, from which the power and sail sector should observe and learn.** Common success factors include:

- A sector or tourism champion to serve as a catalyst for other stakeholders and the organization;
- A mix of both private and public sector stakeholders engaged in the organization;
- A governance and membership model that is tailored to the sector and its stakeholders;
- A clear vision, supported by marketing and development priorities that are based on sound research;
- The ability to raise funding; and,
- The identification of a few, key action items to be implemented in the first year, which, in turn, will motivate other stakeholders to support the organization (in other words, “quick wins” to gain momentum for the organization).

### **Creation of a Tourism Sector Organization**

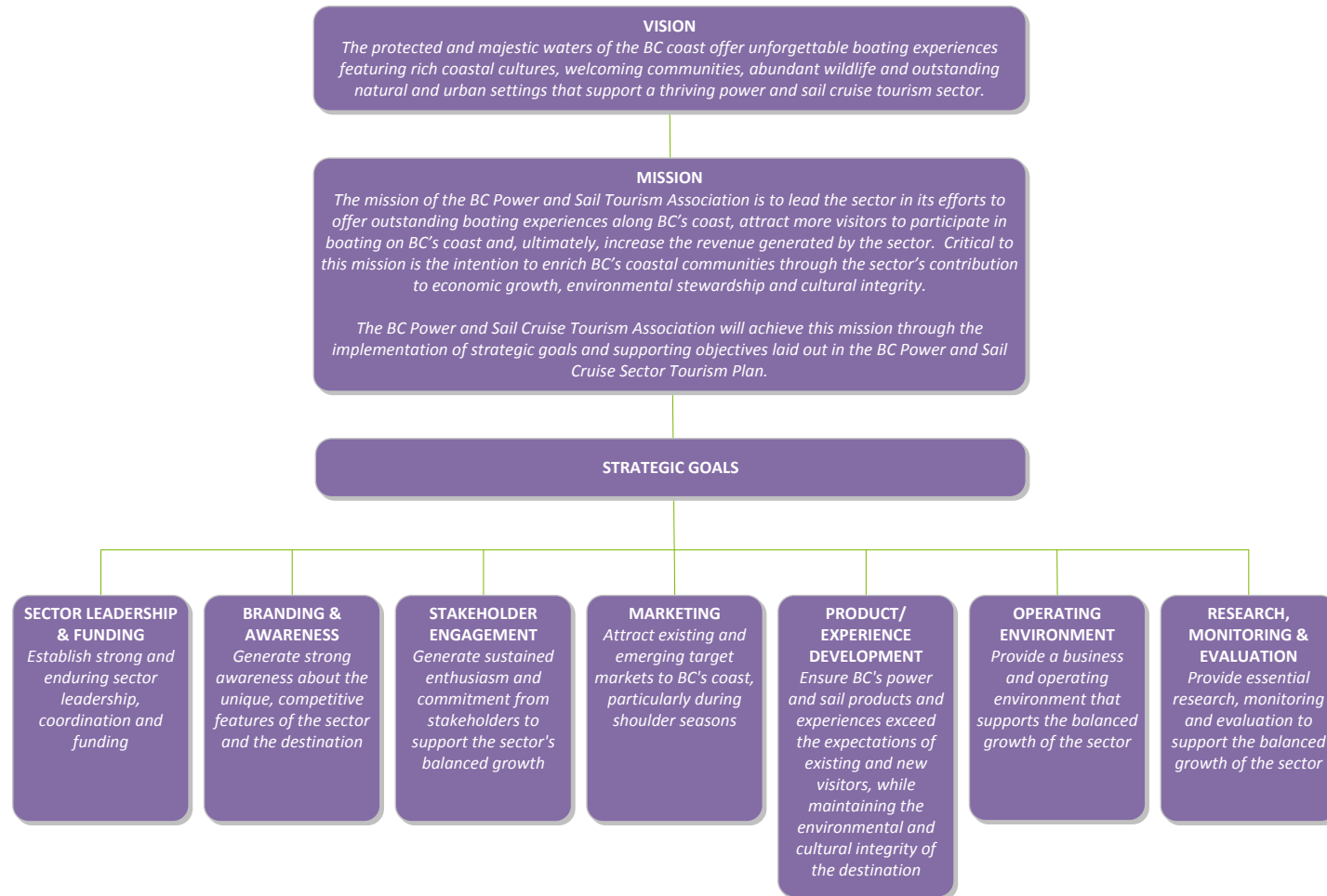
The Provincial Steering Committee has proposed the formation of a tourism sector organization – the BC Power and Sail Cruise Tourism Association – to address the above-noted opportunities and, ultimately, to lead the coordination, development and marketing of the sector in BC. The types of activities that the Provincial Steering Committee identified for the BC Power and Sail Cruise Tourism Association include:

- Marketing and branding to help increase the volume of visitors and increase the yield per visitor;
- Increasing awareness about the sector both internally (amongst stakeholders in BC) and externally (within key markets);
- Supporting and facilitating tourism product/experience development and enhancement;
- Supporting and facilitating the consistent adherence to high standards of service, operations and environmental and cultural stewardship;
- Supporting and facilitating coordination and communication amongst sector stakeholders;
- Encouraging profitability within the sector and with sector partners;
- Generating economic benefits for coastal communities;
- Conducting research to support the sector’s tourism activities; and,
- Collectively addressing critical issues and barriers for the sector.

### **Strategic Framework**

The following vision, mission and goals – developed with input from the Steering Committee – form the Strategic Framework for the Power and Sail Cruise Sector Tourism Plan.

## Strategic Framework for the Power and Sail Cruise Sector Tourism Plan



## Goals and Objectives

The goals and objectives were developed with input from the Steering Committee and are designed to help achieve the vision and fulfill the BC Power and Sail Cruise Tourism Association purpose and mission. They are also intended to capitalize on key opportunities and address priority concerns documented in the Situation Analysis.

While reviewing the goals and objectives, it is important to be cognizant of the following points.

- Given that the BC Power and Sail Cruise Tourism Association is in its early, formative stage, the implementation of the objectives and initiatives will need to be carefully staged, focusing first on the more “foundational” initiatives.
- The goals and objectives are inter-related. For example, clearly the goal related to *Sector Leadership, Coordination and Funding* is critical to the realization of all of the subsequent goals and objectives. Also, as an example, the goal and objectives related to *Branding and Awareness* support the *Stakeholder Engagement* and the *Marketing* goals.

A summary of the goals and objectives is provided below. A more detailed description of each goal, objective and supporting initiatives is presented in the full Sector Plan.

Goals	Objectives
A. Establish strong and enduring sector leadership, coordination and funding.	A-1 Establish the governance model and structure for the BC Power and Sail Cruise Tourism Association A-2 Establish the management structure for the Tourism Sector BC Power and Sail Cruise Tourism Association A-3 Establish a membership model for the BC Power and Sail Cruise Tourism Association A-4 Establish a three-year operating plan, budget and funding model for the BC Power and Sail Cruise Tourism Association
B. Generate strong awareness about the unique, competitive features of the sector and the destination.	B-1 Develop a corporate identity for the Power and Sail Cruise Tourism Sector Association B-2 Create a solid and compelling brand and message for BC’s power and sail cruise destination and sector B-3 Develop and maintain a BC power and sail cruise website to support marketing initiatives and stakeholder engagement and communication initiatives B-4 Prepare collateral material to help build awareness about the sector, the destination’s unique assets and the sector’s products, services and experiences



Goals	Objectives
C. Generate sustained enthusiasm and commitment from stakeholders to support the sector's balanced growth.	<p>C-1 Generate awareness about and support for the sector and for the Power and Sail Cruise Sector Tourism Plan</p> <p>C-2 Encourage communication, coordination and collaboration within the sector</p>
D. Attract existing and emerging target markets to BC's coast to participate in power and sail cruising, particularly during shoulder seasons.	<p>D-1 Conduct the required research to support the development and evaluation of power and sail cruise sector tourism marketing initiatives</p> <p>D-2 Develop the capacity to conduct collaborative tourism marketing initiatives within the sector</p> <p>D-3 Establish strategic partnerships with key stakeholders and partners to pursue collaborative marketing initiatives</p> <p>D-4 Prepare a succinct three-year sector tourism marketing plan</p>
E. Ensure BC's power and sail cruise products and experiences exceed the expectations of existing and new visitors, while maintaining the environmental and cultural integrity of the destination.	<p>E-1 Conduct the required research to support tourism product and experience enhancement and development</p> <p>E-2 Encourage high standards of environmental and cultural stewardship within the sector</p> <p>E-3 Enhance the visitor experience by making visitors aware of the diversity of products and services available</p> <p>E-4 Encourage the sector to provide consistently high standards of service</p> <p>E-5 Develop themed routes and/or areas that appeal to existing and emerging markets</p>
F. Provide a business and operating environment that supports the balanced growth of the sector.	<p>F-1 Identify and monitor barriers to sector growth and, where resources permit, work to address priority barriers to help ensure that the sector can deliver outstanding and safe power and sail cruise experiences</p>
G. Provide essential research, monitoring and evaluation to support the balanced growth of the sector.	<p>G-1 Acquire, coordinate and/or conduct essential research to support the implementation, monitoring and evaluation of the Sector Tourism Plan</p> <p>G-2 Prepare and implement a monitoring and evaluation framework</p>

## Next Steps

A three-year implementation schedule is presented in the last section of the main body of the Power and Sail Cruise Tourism Sector Plan. The implementation steps for Year 1 are shown below. The next steps for Year 1 are critical to ensure the Power and Sail Cruise Tourism Association is established and the foundational work is completed to enable the sector to mature. These timelines were defined with input from the Steering Committee.

YEAR 1 - IMPLEMENTATION		WHO	WHEN
<b>A. SECTOR LEADERSHIP AND FUNDING</b>			
A-1	Establish the governance model and structure <ul style="list-style-type: none"> <li>Name search</li> <li>Constitution</li> <li>Inaugural board (draw from Steering Committee)</li> <li>Legal entity</li> </ul>	Governance Sub-Committee	By August 2013
	Establish the first board	Governance Sub-Committee	Fall 2013
A-2	Establish the management structure	Governance Sub-Committee	Fall 2013
A-3	Establish the membership model	Governance Sub-Committee	Fall 2013
A-4	Establish 3-Year Operating Plan and budget	Governance Sub-Committee	By December 2013
<b>B. BRANDING AND AWARENESS</b>			
B-1	Develop corporate identity	Governance Sub-Committee	By August 2013
B-3	Develop website (start)	Selected members of Steering Committee	Start in September 2013 Complete in 2014
<b>C. STAKEHOLDER ENGAGEMENT</b>			
C-1	Generate awareness and support		
	<b>Regular Communication with Steering Committee</b> <ul style="list-style-type: none"> <li>Communicate regularly with the Steering Committee regarding progress and milestones and to seek assistance with implementation of the Sector Plan</li> </ul>	Governance Sub-Committee	Monthly Steering Committee teleconference during 2013
	<b>Post-planning Communication with Stakeholders</b> <ul style="list-style-type: none"> <li>Obtain list of stakeholders involved in process to date</li> <li>Prepare announcement about the formation of the Power and Sail Cruise Tourism Association</li> <li>Include highlights from the Power and Sail Cruise</li> </ul>	Governance Sub-Committee to lead this Steering Committee members to support this	By June 2013

YEAR 1 - IMPLEMENTATION		WHO	WHEN
	<p>Tourism Sector Plan and indicate how the full document can be obtained</p> <ul style="list-style-type: none"> <li>Distribute this to all stakeholders who have been involved in the process to date, in addition to other key stakeholders</li> <li>Have Steering Committee members distribute this communication to their respective networks of stakeholders</li> </ul>		
	<p><b>Ongoing Regular Communication with Stakeholders</b></p> <ul style="list-style-type: none"> <li>Develop a communication plan and schedule: <ul style="list-style-type: none"> <li>Use a simple template for periodic one-page updates</li> <li>Primarily use email distribution</li> <li>Decide upon frequency (possibly quarterly)</li> </ul> </li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p>	<p>After the June 2013 communication noted above, issue communication quarterly</p>
C-2	<p>Encourage communication, coordination and collaboration amongst stakeholders</p>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p>	<p>Start in September 2013</p>
	<p><b>Fall Steering Committee Meeting</b></p> <ul style="list-style-type: none"> <li>Work with Tourism BC to host a Steering Committee meeting to report on progress to date, establishment of the Association and confirmation of the Board</li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p> <p>Tourism BC</p>	<p>Host in fall 2013</p>
	<p><b>Broader Stakeholder Meeting (Following Steering Committee Meeting)</b></p> <ul style="list-style-type: none"> <li>Consider working with Tourism BC to host a broader stakeholder session following the fall Steering Committee meeting to update existing stakeholders and engage new stakeholders</li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p> <p>Tourism BC</p>	<p>Host in fall 2013</p>
<b>D. MARKETING</b>			
D-1	<p>Conduct the required research to support the development of marketing initiatives</p> <ul style="list-style-type: none"> <li>Start assembling existing research and identifying gaps and research priorities (refer to Situation Analysis)</li> <li>Do this in conjunction with Tourism BC's Research , Planning and Evaluation Branch</li> <li>Coordinate this with E-1 and G-1</li> </ul>	<p>Selected members of Steering Committee</p>	<p>Start in fall 2013 and continue to build in subsequent years</p>

<b>E. PRODUCT/EXPERIENCE DEVELOPMENT</b>			
E-1	<p>Conduct the required research to support product development</p> <ul style="list-style-type: none"> <li>Start assembling existing research and identifying gaps and research priorities (refer to Situation Analysis)</li> <li>Do this in conjunction with Tourism BC's Research , Planning and Evaluation Branch</li> <li>Coordinate this with D-1 and G-1</li> </ul>	Selected members of Steering Committee	Start in fall 2013 and continue to build in subsequent years
<b>F. OPERATING ENVIRONMENT</b>			
F-1	<p>Identify/monitor barriers and, where resources permit, address priority issues</p> <ul style="list-style-type: none"> <li>Develop the process for identifying and monitoring barriers</li> <li>Include this in the Three-Year Operating Plan developed under A. Sector Leadership and Funding</li> </ul>	Governance Sub-Committee	By December 2013
<b>G. RESEARCH, MONITORING AND EVALUATION</b>			
G-1	<ul style="list-style-type: none"> <li>Acquire, coordinate and/or conduct essential research to support the sector</li> <li>Develop a three-year research plan and budget</li> <li>Coordinate this with D-1 and E-1</li> </ul>	Selected members of Steering Committee	Start in fall 2013 and continue to build in subsequent years
G-2	<p>Prepare and implement a monitoring and evaluation framework for the Power and Sail Tourism Sector Plan and for sector performance more broadly</p>	Selected members of Steering Committee	Complete framework in 2013

## 1.0 Introduction and Methodology

### Introduction

The BC coast offers outstanding opportunities for power and sail cruising and currently attracts visitors from several key markets. However, in terms of formalized, collaborative tourism product development and marketing, the sector is not developed. There is strong interest by stakeholders associated with power and sail cruising in BC to formalize the sector and conduct coordinated, effective tourism product development and marketing to capitalize on the significant opportunities the coast presents. This is the subject of the British Columbia Power and Sail Sector Tourism Development and Marketing Plan (the “Sector Tourism Plan”).

### Definition

The BC power and sail cruise sector includes cruising by powerboat or sailboat anywhere along the BC coast. Other attributes that define the sector are as follows:

- Cruising or sailing is the main purpose of the activity (as distinct from fishing being the main purpose of the boating activity)<sup>2</sup>;
- The sector includes private recreational boaters (transient), bareboat charters and guided charters; and,
- The sector does not include pocket cruises, cruising on large cruise ships and companies that primarily offer fishing charters.

The typical experience involves visiting multiple marinas and/or harbours, usually over the course of one or more nights and often over several weeks.

### Planning Process

The BC coast is recognized by many as an outstanding, world-class setting for boating. While the coast attracts power and sail cruisers from the Pacific Northwest, as well as from other parts of Canada, the US and Europe, many acknowledge that there is a significant opportunity to further coordinate the sector and market the BC coast as a world-class power and sail cruising destination.

As a result, representatives who are associated with power and sail cruising in BC approached Tourism BC, as part of the Ministry of Jobs, Tourism and Skills Training, with a request to participate in the Experiences BC program. The overall goal of participating in the Experiences BC program is to organize the sector and prepare a long-term, industry-led tourism development and marketing plan. Grant Thornton LLP was engaged to facilitate the Experiences BC process

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<sup>2</sup> This does not mean that visitors participating in power and sail cruising will not fish or participate in other activities while on their cruising vacation; rather, it means that the main reason for their trip is for the actual power/sail cruising experience, which may involve other activities as well.

for the power and sail cruise sector.

Tourism BC is overseeing the planning process. A Steering Committee comprised of representatives from the power and sail cruise sector was formed to provide industry input and guidance throughout the planning process. The steering committee members are listed below (in alphabetical order).

Name	Organization
David Mailloux	Nanaimo Port Authority
Derek Baker	Prince Rupert & Prince Edward Economic Development Commission
Don Prittie	BC Marine Trades Association Board of Directors
Geoff Millar	Cowichan Valley Regional District/Economic Development Association of BC
Heather Adel	Misty Isles Economic Development Society
Jim Connolly	Yacht BC
Jim Gilliland	BC Parks
John Farrell	Community Futures of the Pacific North West
Keith Henry	Aboriginal Tourism BC
Kevan Ridgway	Vancouver, Coast and Mountains Tourism Association
Kevin Monahan	Waggoner Cruising Guide
Kim Barbero	BC Marine Trades Association
Lyle Isaak	Back Eddy Resort
Peter Laurie	Back Eddy Resort
Mark Bunzel	Waggoner Cruising Guide
Maureen Gordon	Maple Leaf Adventures
Michael McLaughlin	Rural Futures Lower Sunshine Coast
To be determined	Oak Bay Marine Group
Michael Shortt	BC Marine Trades Association Board of Directors
Paul Kamon	Discover Powell River
Randy Burke	Blue Water Adventures
<b>Facilitator<sup>3</sup>:</b>	<b>Tourism BC/Ministry of Jobs, Tourism and Skills Training Representatives:</b>
Jennifer Nichol, Grant Thornton LLP	Heather Boyd Andrew Little Richard Lewis Nancy Radman

<sup>3</sup> Facilitator provided by Tourism BC

The planning process commenced in November, 2010, with an exploratory workshop hosted by Tourism BC to discuss with the BC power and sail cruise sector the possibility of engaging in a comprehensive tourism planning process through Experiences BC. During this workshop, participants expressed their interest in participating in the Experiences BC program to develop a multi-year sector tourism development marketing plan.

Following the November 2010 workshop, additional power and sail cruise stakeholders were consulted, eventually leading to the first power and sail cruise steering committee meeting which was held in March 2012. At that time, a memorandum of understanding (MOU) was signed between Tourism BC and the power and sail cruise sector steering committee for participation in the Experiences BC program.

Following the March 2012 workshop and the signing of the MOU, a series of five regional workshops were held in communities along the BC coast. Through these workshops, over 100 stakeholders provided input into the development of a power and sail cruise sector Situation Analysis, which forms the foundational research document upon which this tourism plan is based.

### **Power and Sail Cruise Sector Situation Analysis**

The Situation Analysis is one of two key documents in the development of the multi-year tourism development and marketing plan for the BC power and sail cruise sector. The Situation Analysis is a factual document that answers the following key questions.

- What are the key trends – economic, tourism and/or regulatory – that are or potentially could be impacting the power and sail cruise sector?
- What are the characteristics of power and sail cruise visitors?
- What tourism opportunities and challenges is the power and sail cruise sector facing?

The Situation Analysis analyzes information in the following categories:

- Macro Environment, including prevalent global tourism and economic trends;
- BC Tourism Trends, including overall BC visitation, tourism growth, and visitor origin;
- Sector Visitors Characteristics, Trends and Growth;
- Power and Sail Cruise Sector Overview (BC), including the types of experiences offered, infrastructure and policy/regulatory issues;
- Power and Sail Sector SWOT (BC) - A summary of the strengths, weaknesses, opportunities, and threats resulting from the facilitated planning sessions;
- Power and Sail Sector Regional Trends (BC);
- Experience of other Jurisdictions/Organizations; and,
- Key Learning and Next Steps, which distills the key insights and learning from the Situation Analysis for consideration during the development of the Sector Tourism Plan.

At this time, there is limited research on the power and sail cruise sector. As the Situation Analysis relies heavily on information from secondary sources, existing information rarely is available in exactly the form that is ideal for this particular purpose. In the course of information gathering, the project team focused on the information that is most useful to inform the development of a long-term Sector Tourism Plan within the scope of this project.

Before its finalization, the Situation Analysis was circulated to the regional workshop participants and the provincial steering committee. The complete Situation Analysis is available for review through Tourism BC (**contact Richard Lewis at [Richard.Lewis@gov.bc.ca](mailto:Richard.Lewis@gov.bc.ca)**).

### **Multi-Year Sector Tourism Development and Marketing Plan**

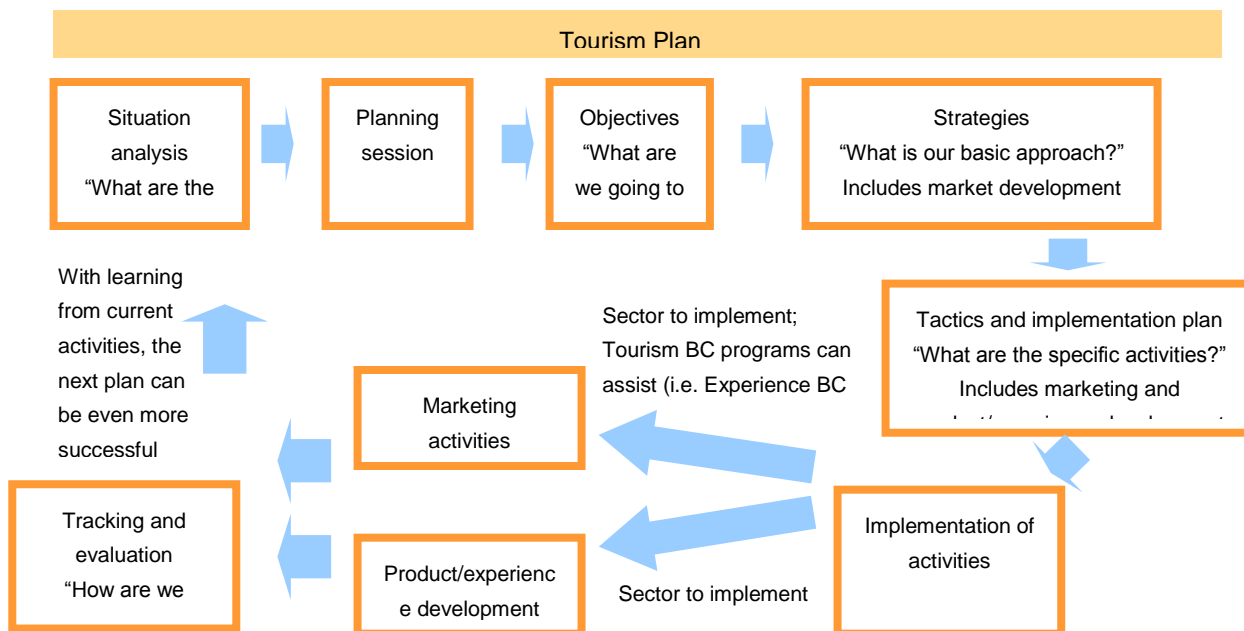
Based on the Situation Analysis, two planning sessions with the provincial steering committee, and additional research and analysis conducted by Tourism BC and the facilitator, the Power and Sail Cruise Sector Tourism Development and Marketing Plan (the “Sector Tourism Plan”) was developed. The Sector Tourism Plan presents an overall vision, strategic goals and objectives that provide a roadmap for the BC power and sail cruise sector. The sector tourism plan identifies areas in which the power and sail cruise sector will focus to build its business and the steps it needs to take to achieve desired results.

In preparation of the Sector Tourism Plan, the following principles have been considered:

- Visitor Needs. BC sectors must be responsive to the needs of visitors. Sectors need to understand visitor needs first, develop tourism experiences to meet those needs, and then market the appropriate tourism experience to the appropriate types of visitors.
- Inclusiveness. To address the issues and opportunities facing the power and sail cruise sector, consultation and collaboration along all coastal areas of the province needs to occur.
- Effective partnerships. Tourism is a fragmented industry and effective partnerships among tourism operators, sectors, destination marketing organizations, educational institutions, and all levels of government are essential to building a cohesive, strong and sustainable industry in BC.
- Sustainability. Tourism in BC will be developed in a sustainable manner, recognizing the need for economic, social and environmental sustainability.
- Community Support. To be successful, tourism development in sectors needs to be supported by communities, including businesses, local government and residents.



Once implementation of the Sector Tourism Plan begins, results should be tracked regularly such that an updated plan, with learning from the current year's activities, can be even more effective in increasing benefits to the sector. The objectives and strategies should be reviewed, with most of the updates occurring on the detailed initiatives. The planning cycle can be illustrated as follows:



The Sector Tourism Plan is structured as follows:

- Introduction and Methodology
- Visitor Characteristics, Trends and Growth
- Sector Overview
- Key Learning from the Situation Analysis
- Vision, Purpose and Strategic Framework
- Goals and Objectives
- Implementation Schedule and Immediate Next Steps

## 2.0 Visitor Characteristics, Trends and Growth

This section presents research highlights related to power and sail cruise visitor characteristics, trends and growth, based primarily on the following sources.

- Travel Activities and Motivations (TAMS) 2006 data for both Canadian and US travellers;
- A BC Small Craft Harbour Survey that was conducted in January 2009<sup>4</sup>; and,
- BC Parks boating attendance figures for coastal marine parks.

More detailed research is provided in Appendix A and in the Power and Sail Cruise Sector Situation Analysis.

### Travel Activities and Motivations Research Findings

The TAMS research indicates that an estimated 0.9 million Canadians and 5.2 million Americans were motivated to take a trip for the primary purpose of power or sail cruising.

Close to 60% of Canadian and American power and sail cruise visitors are male.<sup>5</sup> The TAMS research indicates that:

- 58% of Canadian power and sail cruise visitors are male;
- 58% of American power and sail cruise visitors are male; and,
- 62% of power and sail cruise visitors from Washington State are male.

However, the guided charter sector tends to draw slightly more females than males.

The age span of Canadians and Americans who are motivated to travel for power and sail cruising is wide-ranging and is fairly consistent between the two markets.

- Close to 60% of Canadians are in the 35 to 64 age category.
- Close to 60% of Americans are in the 36 to 65 age category.
- 33% of Canadians are in the 18 to 34 age category.
- 31% of Americans are in the 18 to 35 age category.

Power and sail cruise visitors tend to be from households with higher-than-average income levels (based on the 2006 study).

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<sup>4</sup> Conducted by David Mailloux, Nanaimo Port Authority

<sup>5</sup> Note that the research does not indicate the destinations of those surveyed. Therefore, the research is not specific to BC.

- Approximately 42% of Canadian power and sail cruisers report household incomes in excess of \$80,000.
- Approximately 44% of American power and sail cruisers report household incomes in excess of \$80,000.

Both the Canadian and American survey respondents who were motivated to travel for power and sail cruising had a higher propensity to use the Internet than the overall sample of respondents.

Canadians and Americans motivated to travel primarily for marine activities also enjoy a number of other sport and cultural activities while on vacation. The most popular activities include:

- Sport/outdoor activities:
  - Water-based outdoor activities;
  - Land-based outdoor activities;
  - Winter outdoor activities;
  - Team sports/tournaments/games;
  - Theme/amusement parks; and,
  - Spectator sports.
- Cultural activities:
  - Shopping, dining, food related;
  - Exhibits, historic sites, museums;
  - Festivals and events;
  - Performing arts; and,
  - Hands-on learning activities.

### **Small Craft Harbour Survey Findings**

A Small Craft Harbour Survey administered in BC in 2009 indicated that there were approximately 34,400 small leisure vessels seeking moorage along the BC coast in 2008, of which approximately 60% were from Canada and 40% were from the US. The same survey indicated that there were approximately 80 small craft harbours and 200 private marinas along the BC coast. Dock allocation was approximately 51% for commercial fishing vessels (CFVs) and 49% for transient vessels. The Small Craft Harbour Survey revealed that there is very little (if any), coordinated promotion of BC's marinas, harbours and coastline to power and sail cruising market.

### **BC Parks Research**

BC Parks boating attendance figures for provincial coastal marine parks show boating attendance has increased by approximately 17% since 2007/08. However, more recently, boating traffic declined (by 1.7% between 2009/10 and 2010/11).

Custom entries from the US to BC by private boat have experienced a significant decline in recent years. The number of U.S. residents entering BC by private boat declined by an average annual rate of just under 6% between 2007 and 2011.

## 2.0 Sector Overview

This section presents a brief overview of the BC power and sail cruise sector. A more detailed description of the product and destination is provided in Appendix B and in the Power and Sail Cruise Sector Situation Analysis.

### Product Definition

The BC power and sail cruise sector includes cruising by powerboat or sailboat anywhere along the BC coast. Other attributes that define the sector are as follows:

- Cruising or sailing is the main purpose of the activity (as distinct from fishing being the main purpose of the boating activity)<sup>6</sup>;
- The sector includes private recreational boaters (transient), bareboat charters and guided charters; and,
- The sector does not include pocket cruises, cruising on large cruise ships and companies that primarily offer fishing charters.

The typical experience involves visiting multiple marinas and/or harbours, usually over the course of one or more nights and often over several weeks.

### Product and Destination Attributes

The BC coast has outstanding natural and cultural attributes, facilities and services and complementary activities that support power and sail cruising. Attributes most commonly associated with BC's power and sail cruising experience are listed below.

Natural Attributes	Cultural Attributes
Exceptional scenery	Cultural heritage
Diversity of wildlife	Aboriginal culture and authentic product
Intact wildlife populations and ecosystems	Working harbours
Remoteness	Wineries
Many parks and protected areas	Unique festivals and events
Beaches and clean water	Rural areas
450 km of protected water	Coastal communities located on marine routes
20,000 km of coastline (much uninhabited)	West coast culture and cuisine
Abundance of islands	Environmentally friendly
Good climate (depending on season)	

<sup>6</sup> This does not mean that visitors participating in power and sail cruising will not fish or participate in other activities while on their cruising vacation; rather, it means that the main reason for their trip is for the actual power/sail cruising experience, which may involve other activities as well.

Facilities and Services	Activities to Compliment Boating
Network of harbours and marinas	Diversity of activities to compliment boating
Range of marine services and amenities	High-quality diving
Services and facilities in parks	Swimming
Haul-out services	Mountain hikes
Onshore transportation	Golfing
Expert, hospitable wildlife guides (guided charters)	

A key competitive strength for the power and sail cruise sector is the network of coastal marine parks and protected areas. These include many coastal marine parks and conservancies under the jurisdiction of BC Parks, in addition to three National Park Reserves.

### Current Organization of the Sector

While many stakeholders, organizations and government agencies are involved in the BC power and sail cruise sector, to date, coordinated destination development, product packaging, tourism marketing, and issues management has been very limited. The organizations and stakeholders that are currently involved in the sector are listed below.

Power and Sail Sector Organizations and Stakeholders	
Public and private marinas	Chambers of Commerce
Charter companies	Canadian Power and Sail Squadron
BC Parks and Parks Canada	Harbour Authority Association of BC
Environment Canada	Port Authorities
Canadian Coastguard	Harbour Authorities
Transport Canada – Office of Boating Safety	BC Yacht Brokers' Association
Ministry of Jobs, Tourism and Skills Training	BC Marine Trades Association
Municipal and regional governments	Northwest Marine Trades' Association
Regional Destination Marketing Organizations	Council of BC Yacht Clubs
Community Destination Marketing Organizations	Pacific Coast Congress of Harbour Masters and Port Managers
Department of Fisheries and Oceans—Small Craft Harbours	

## Current Markets

Current key visitor geographic markets are as follows.

Existing Visitor Geographic Markets	
Primary Markets	Secondary Markets (smaller volumes)
British Columbia	Alaska
Washington	Ontario
Alberta	European - West (UK, Germany, France)
California	European - East
Oregon	

With regard to the European markets, stakeholders noted that these visitors:

- Are typically attracted by an experience that they cannot get in Europe; and,
- Rely on chartered vessels.

## Emerging Markets

Stakeholders noted that emerging markets for the power and sail cruise sector include Ontario and Alberta residents, Eastern US seaboard residents, BC residents, Asian residents, and the “Baby Boomer” market.

## Provincial Market Characteristics and Trends

When asked about the typical characteristics of existing markets for BC’s power and sail cruising sector, stakeholders provided the following observations.

Market Characteristics	
Higher male representation (unguided boating)	Inter-generational travelling parties
Higher female representation (guided charters)	Boys’ weekend get-aways
Many couples	Women’s “cruise & learn” charters
Some families	Yacht clubs
Many retirees	Solo travelers (guided charters)

Stakeholders also indicated that boating magazines and articles are **focusing more on the broader experience of destinations**, rather than only the marine and boating environment. This is important with regard to any future planning related to destination development, tourism packaging and marketing for BC’s power and sail cruising sector.

BC Parks boating attendance figures for provincial coastal marine parks show that boating attendance has increased by approximately 17% since 2007/08. However, more recently, boating traffic declined (by 1.7% between 2009/10 and 2010/11).

### Regional Market Characteristics and Trends

Market-related trends for the power and sail cruise sector reported by stakeholders varied somewhat between regions and also between charter and non-charter operations. Highlights are presented below.

- **Visitation trends** – Most stakeholders reported that boating traffic has been declining and/or flat in recent years, reflecting overall tourism and economic trends. Some reported that boating traffic appears to be picking up. Boat sales have been increasing, which is a positive indicator for future boating activity.
- **Geographic markets** – While primary markets vary slightly between regions, overall the key markets are BC and the US, other Canada, and Europe.
- **Trip length** – The length of trip varies considerably in each region of the coast. Boating trips may be many days, weeks or even months in length. The southern harbours and marinas tend to receive more weekend/day trips due to proximity to larger markets where boaters are able to get away for a short trip. Many boaters on the BC coast are travelling en route to/from Alaska.
- **Visitors** – The types of visitors also vary considerably and may include couples, families, retirees and “all male”/“all female” groups.
- **Boat ownership** – Most regions reported that 90% or more of boaters own their own boat.
- **Seasons** – Some stakeholders reported the months of July and August as high season, while some charter operators reported September as high season. Some reported the shoulder season as May to June, September to October, or April and November.

## 3.0 Key Learning from Situation Analysis

This section summarizes the key learning distilled from the BC Power and Sail Cruise Sector Situation Analysis<sup>7</sup>, which forms the research foundation upon which the Sector Tourism Plan was developed

### Outstanding Assets to Support Power and Sail Cruising

**BC's coastline offers outstanding natural assets that support power and sail cruising**, including: exceptional scenery, 450 kilometers of protected water, 20,000 kilometers of coastline, intact wildlife populations and ecosystems, wildlife diversity, an abundance of islands, many marine parks/ protected areas, beaches and clean water. These natural assets are supported by cultural attractions, communities, boating infrastructure and services and a range of land-based tourism activities to complement boating. Future marketing efforts should focus on building awareness about and promoting these outstanding assets.

### Current Lack of Tourism Coordination

**Currently, stakeholders in the power and sail sector operate independently.** There is very little, if any, coordination with regard to **tourism**, including sharing information, setting sector standards, coordinating marketing activities and addressing issues that are of collective concern to the sector.

### A Need to Recognize the Diversity of Facilities, Products and Experiences

**Future efforts to coordinate the tourism development and marketing of the power and sail cruise sector must recognize that the BC coast offers considerable diversity** with regard to:

- The coastal settings within which people participate in power and sail cruising;
- The scale of marinas, docks and other facilities and services available to visitors; and,
- The types of products and experiences available for visitors.

Tourism product development and marketing efforts must recognize this diversity and ensure that we are marketing the “right” product to the “right” markets at the “right” time. At the same time, while this diversity exists, there is a common interest to:

- Enhance awareness about the entire BC coast as an exceptional power and sail cruising destination: and,
- Collectively address issues that affect the sector as a whole.

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<sup>7</sup> For a receive the full Power and Sail Cruise Sector Situation Analysis, please contact Tourism BC (Richard Lewis at [Richard.Lewis@gov.bc.ca](mailto:Richard.Lewis@gov.bc.ca)).



### Significant Opportunities

**Given the outstanding assets and the current lack of coordination noted above, there is a significant opportunity to coordinate the sector and enhance the overall competitiveness of BC as a world-class power and sail cruise destination.** In turn, this presents opportunities to increasing power and sail visitation and spending in BC, particularly in areas where and seasons when excess capacity exists.

### Insufficient Research

**While there is some research related to the power and sail cruise sector and markets available, there are considerable gaps that, if filled, would better enable stakeholders to develop strategic tourism development and marketing plans for the sector.** Key research gaps for the sector include (but may not be limited to):

#### *Supply-side Research*

- A comprehensive inventory of harbours/marinas along the coast;
- Dock/marina capacity research by month/season;
- Inventory/capacity of local operators,
- Profile of the types of power and sail products and experiences offered in BC;
- Routing/mapping research; and,
- Research about environmental and cultural sensitivities that must be respected.

#### *Demand-side, Competitive and Economic Research*

- Consumer needs, preferences and trends research;
- Research about the specific interests of different ethnic groups that are taking an interest in boating;
- Research on the North American and overseas markets for chartering of all kinds including guided natural history/cultural history charters;
- Research on market size and characteristics;
- Pre and post trip awareness about what the destination offers;
- Economic impact research; and,
- Research related to competitive jurisdictions.

### Learning from Other Jurisdictions

**Very few jurisdictions have sector organizations that coordinate tourism product enhancement, communication and marketing for power and sail cruise. The three profiled in the Situation Analysis provide examples for BC's power and sail cruise tourism sector with regard to how to address:**

- Purpose, mandate and scope of activities;
- Governance, membership and funding models;
- Website design;

- Marketing and branding; and,
- Partnerships and stakeholder relationships.

The absence of many such organizations also suggests that BC could gain a competitive advantage over other coastal destinations by establishing an effective power and sail cruise tourism sector organization.

### Learning from Other Tourism Sectors in BC

**Other tourism sectors in BC that have realized success through Experiences BC have several factors in common, from which the power and sail sector should observe and learn.**

Common success factors include:

- A **sector or tourism champion** to serve as a catalyst for other stakeholders and the organization;
- A mix of both private and public sector stakeholders engaged in the organization;
- A governance and membership model that is tailored to the sector and its stakeholders;
- A clear vision, supported by marketing and development priorities that are based on sound research;
- The ability to raise funding; and,
- The identification of a few, key action items to be implemented in the first year, which, in turn, will motivate other stakeholders to support the organization (in other words, “quick wins” to gain momentum for the organization).

### Conclusion

The Situation Analysis points to significant opportunities to coordinate the power and sail cruise tourism sector in BC on many fronts, including: product and infrastructure enhancement, establishment of common standards, coordinated and strategic tourism marketing to increase boating visitation when dock capacity is available, and the mobilization of a common sector voice to help address regulatory and other issues facing the sector. For the guided charter segment of the sector, marketing product to coincide with available dock capacity is not a key issue/opportunity; rather, this segment is interested in increasing visitation using BC-owned guided cruises.

Future collaborative efforts to enhance power and sail cruising in BC and market the destination and its experience must recognize the diversity of experiences and facilities available along BC's coastline.

Over 100 power and sail cruise sector stakeholders in BC were engaged in the process to develop the Situation Analysis. Overall, these stakeholders demonstrated clear enthusiasm for the coordination of the sector and the development of an industry-led sector tourism development and marketing plan.

## 4.0 Vision, Purpose and Mission

The Steering Committee confirmed that the sector organization should be called the BC Power and Sail Cruise Tourism Association. This name may be further discussed and refined as the governance model is finalized. For the purposes of the vision, purpose, mission and goals, the sector organization is referred to as the BC Power and Sail Cruise Tourism Association.

### Vision

A vision provides a clear, compelling and bold picture of the preferred future. A vision:

- Describes what “success” looks like;
- Is set out over a long period of time, in this case five to ten years; and,
- Is sufficiently challenging to motivate, inspire and influence key stakeholders, but, at the same time, is achievable.

The Provincial Steering Committee developed the following vision for the BC Power and Sail Cruise Tourism Association.

#### Vision

*The protected and majestic waters of the BC coast offer unforgettable boating experiences featuring rich coastal cultures, welcoming communities, abundant wildlife and outstanding natural and urban settings that support a thriving power and sail cruise tourism sector.*

### Purpose

The purpose of the BC Power and Sail Cruise Tourism Association is a critical element of the *Power and Sail Cruise Sector Tourism Development and Marketing Plan*. The Provincial Steering Committee reviewed the purpose statements of other organizations, such as Sail South East England, and discussed the types of activities that should be the focus of the BC power and sail cruise sector. This resulted in the following areas of focus, which collectively form the “purpose” of the BC Power and Sail Cruise Tourism Association:

- Tourism marketing and branding to help increase the volume of visitors and increase the yield per visitor
- Increasing awareness about the sector both internally (amongst stakeholders in BC) and externally (within key markets)

- Supporting and facilitating product/experience development and enhancement
- Supporting and facilitating the consistent adherence to high standards of service, operations and environmental and cultural stewardship
- Supporting and facilitating coordination and communication amongst sector stakeholders
- Encouraging profitability within the sector and with sector partners
- Generating economic benefits for coastal communities
- Conducting research to support the sector's activities
- Collectively addressing critical issues and barriers for the sector

This is the starting point for the development of a sector purpose statement, which can be further defined under the *Sector Leadership, Coordination and Funding Goal* (see next section of the *Sector Tourism Plan*).

### **Mission**

Based on the vision and the purpose stated above, the Steering Committee set out the following mission for the BC Power and Sail Cruise Tourism Association.

#### **Mission**

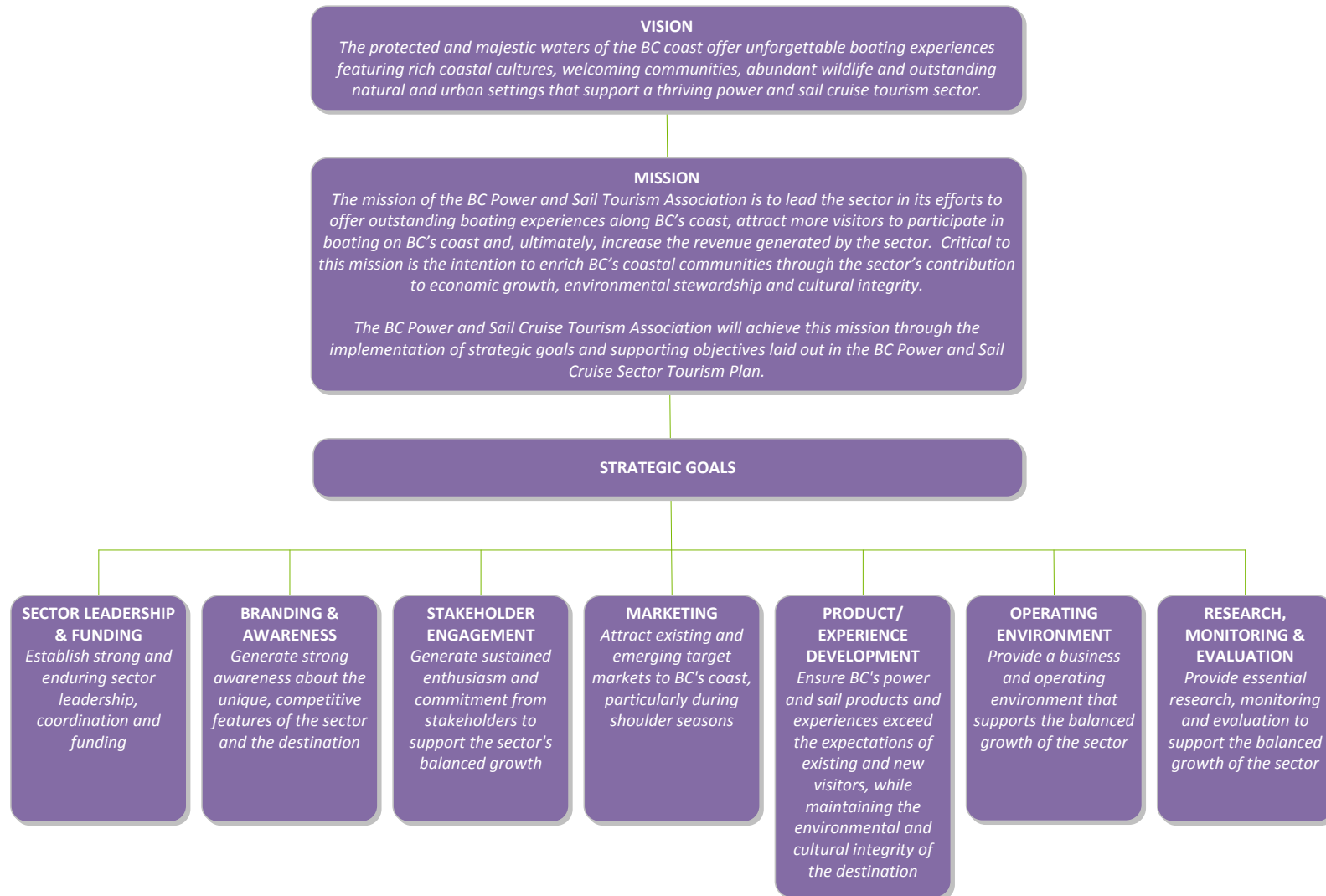
*The mission of the BC Power and Sail Tourism Association is to lead the sector in its efforts to offer outstanding boating experiences along BC's coast, attract more visitors to participate in boating on BC's coast and, ultimately, increase the revenue generated by the sector. Critical to this mission is the intention to enrich BC's coastal communities through the sector's contribution to economic growth, environmental stewardship and cultural integrity.*

*The BC Power and Sail Cruise Tourism Association will achieve this mission through the implementation of strategic goals and supporting objectives laid out in the BC Power and Sail Cruise Sector Tourism Plan.*

### **Strategic Framework**

The strategic framework – which presents the destination vision and supporting goals for the Sector Tourism Plan – is shown on the following page. The goals and objectives are defined in more detail in the section following the Strategic Framework.

## Strategic Framework for the Power and Sail Cruise Sector Tourism Plan



## 5.0 Goals and Objectives

### Summary of Goals and Objectives

The goals, objectives and supporting initiatives were developed with input from the Provincial Steering Committee. They are designed to achieve the vision and fulfill the BC Power and Sail Cruise Tourism Association's purpose and mission presented in the preceding section. They are also intended to capitalize on key opportunities and address priority concerns documented in the Situation Analysis.

While reviewing the goals and objectives, it is important to be cognizant of the following points.

- Given that the BC Power and Sail Cruise Tourism Association is in its early, formative stage, the implementation of the objectives and initiatives will need to be carefully staged, focusing first on the more "foundational" initiatives. Note that an implementation plan is presented in the last section of the Sector Tourism Plan.
- The goals and objectives are inter-related. For example, clearly the goal related to *Sector Leadership, Coordination and Funding* is critical to the realization of all of the subsequent goals and objectives. Also, as an example, the goal and objectives related to *Branding and Awareness* support the *Stakeholder Engagement* and the *Marketing* goals.

A summary of the goals and objectives is provided below. A more detailed description of each goal, objective and supporting initiatives follows the table.

Goals		Objectives	
A.	Establish strong and enduring sector leadership, coordination and funding.	A-1	Establish the governance model and structure for the BC Power and Sail Cruise Tourism Association
		A-2	Establish the management structure for the BC Power and Sail Cruise Tourism Association
		A-3	Establish a membership model for the BC Power and Sail Cruise Tourism Association
		A-4	Establish a three-year operating plan, budget and funding model for the BC Power and Sail Cruise Tourism Association
B.	Generate strong awareness about the unique, competitive features of the sector and the destination.	B-1	Develop a corporate identity for the Power and Sail Cruise Sector Association
		B-2	Create a solid and compelling brand and message for BC's power and sail cruise destination and sector
		B-3	Develop and maintain a BC power and sail cruise website to support marketing initiatives and stakeholder engagement and communication initiatives

Goals		Objectives	
		B-4	Prepare collateral material to help build awareness about the sector, the destination's unique assets and the sector's products, services and experiences
C.	Generate sustained enthusiasm and commitment from stakeholders to support the sector's balanced growth.	C-1	Generate awareness about and support for the sector and for the Power and Sail Cruise Sector Tourism Plan
		C-2	Encourage communication, coordination and collaboration within the sector
D.	Attract existing and emerging target markets to BC's coast to participate in power and sail cruising, particularly during shoulder seasons.	D-1	Conduct the required research to support the development and evaluation of power and sail cruise sector tourism marketing initiatives
		D-2	Develop the capacity to conduct collaborative tourism marketing initiatives within the sector
		D-3	Establish strategic partnerships with key stakeholders and partners to pursue collaborative tourism marketing initiatives
		D-4	Prepare a succinct three-year sector tourism marketing plan
E.	Ensure BC's power and sail cruise products and experiences exceed the expectations of existing and new visitors, while maintaining the environmental and cultural integrity of the destination.	E-1	Conduct the required research to support tourism product and experience enhancement and development
		E-2	Encourage high standards of environmental and cultural stewardship within the sector
		E-3	Enhance the visitor experience by making visitors aware of the diversity of products and services available
		E-4	Encourage the sector to provide consistently high standards of service
		E-5	Develop themed routes and/or areas that appeal to existing and emerging markets
F.	Provide a business and operating environment that supports the balanced growth of the sector.	F-1	Identify and monitor barriers to sector growth and, where resources permit, work to address priority barriers to help ensure that the sector can deliver outstanding and safe power and sail cruise experiences
G.	Provide essential research, monitoring and evaluation to support the balanced growth of the sector.	G-1	Acquire, coordinate and/or conduct essential research to support the implementation, monitoring and evaluation of the Sector Tourism Plan
		G-2	Prepare and implement a monitoring and evaluation framework

## **A. Sector Leadership, Coordination and Funding**

### ***Strategic Goal:***

***Establish strong and enduring sector leadership, coordination and funding.***

As this is a new sector, the Provincial Steering Committee – and, more specifically, a Governance Sub-Committee – has dedicated considerable time exploring options for the governance and management of the sector. The Governance Sub-Committee has examined the governance and management models of other Experiences BC sectors. Key learning from other sectors is that the model must be tailored to the specific needs of the sector. Note that, as the name of the sector and sector organization has yet to be determined<sup>8</sup>, it is referred to as the BC Power and Sail Cruise Tourism Association for the purposes of this discussion.

The Sub-Committee's due diligence has also included discussions with the Executive Director and Board Members of the BC Marine Trades Association (BCMTA), to explore opportunities to align with this organization. The Sub-Committee plans to continue discussions with the BCMTA, focusing on the structure of a potential relationship, and more specifically:

- The possibility of the BC Power and Sail Cruise Tourism Association aligning with the BCMTA as a “sector group”, possibly through an association membership;
- The possibility of the BCMTA providing some level (to be defined) of administrative/management support on a fee-for-service basis; and,
- The potential benefits of this relationship to both organizations.

The Sub-Committee has also discussed the possibility of using an existing organization that is a registered society – such as the Vancouver, Coast and Mountains Tourism Association or the Economic Development Association of British Columbia – to assist with governance and management issues in the short-term. Alignment with an organization such as the Vancouver, Coast and Mountains Tourism Association or Economic Development Association of British Columbia may be an interim arrangement or it may be a longer-term arrangement.

The objectives and supporting initiatives related to a goal for sector leadership, organization and funding are further described below, recognizing that the Governance Sub-Committee is currently in the process of discussing potential alignment with other organizations. Given that this goal is foundational in nature, this is an immediate priority for the BC Power and Sail Cruise Tourism Association.

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<sup>8</sup> This should be done as part of a process to develop a corporate identity and to create a brand for the sector (see Goal B, Objectives B-1 and B-2).



Objectives	Supporting Initiatives
A-1 Establish the governance model and structure for the BC Power and Sail Cruise Tourism Association	<ul style="list-style-type: none"> <li>Establish the governance model for the BC Power and Sail Cruise Tourism Association, based on the groundwork completed by the Governance Sub-Committee. This will entail determining the: <ul style="list-style-type: none"> <li>Legal registration of the non-profit society, if it is decided to create a separate non-profit society;</li> <li>Possible alignment with the BCMTA or another organization and the specifics of this relationship;</li> <li>Size, composition and terms of reference for the Board of Directors; and,</li> <li>Definition of accountabilities to the BCMTA or to another organization and to different stakeholders/stakeholder groups.</li> </ul> </li> <li>Establish the Board of Directors.</li> <li>Once the Board of Directors has been established, define the mandate for the BC Power and Sail Cruise Tourism Association, based on the preliminary input provided on the BC Power and Sail Cruise Tourism Association's purpose (as documented in the Sector Tourism Development and Marketing Plan).</li> </ul>
A-2 Establish the management structure for the BC Power and Sail Cruise Tourism Association	<ul style="list-style-type: none"> <li>Define the position that will lead/manage the BC Power and Sail Cruise Tourism Association, including: <ul style="list-style-type: none"> <li>Terms of reference, accountability and compensation; and,</li> <li>Attributes for the ideal candidate.</li> </ul> </li> <li>Either recruit for this position or establish an agreement with an existing organization for this organization to fulfill the terms of reference.</li> </ul>
A-3 Establish a membership model for the BC Power and Sail Cruise Tourism Association	<ul style="list-style-type: none"> <li>Conduct research on membership models used by other sector organizations and, based on this research, determine: <ul style="list-style-type: none"> <li>A membership fee structure tailored to different stakeholder types/groups (e.g., individual operators, private marinas, government/government organizations, etc.);</li> <li>Membership benefits associated with different fee levels (tiered structure) and different stakeholder types; and,</li> <li>Forecasted numbers of membership sales and associated revenue in years 1, 2 and 3.</li> </ul> </li> <li>Prior to finalizing the membership model, test the proposed fees and benefits with a cross-section of potential members.</li> <li>Finalize and establish the membership model.</li> </ul>
A-4 Establish a three-year operating plan, budget and funding model for the BC Power and Sail Cruise	<ul style="list-style-type: none"> <li>Prepare a succinct, three-year operating plan for the BC Power and Sail Cruise Tourism Association.</li> <li>Prepare a three-year budget for the BC Power and Sail Cruise Tourism Association, which will fund the operating costs, in addition to the implementation of priority initiatives defined in the Power and Sail Cruise Sector Tourism</li> </ul>

Objectives	Supporting Initiatives
Tourism Association	<p>Development and Marketing Plan.</p> <ul style="list-style-type: none"> <li>Define a funding model for the BC Power and Sail Cruise Tourism Association. Potential revenue sources for the funding model include: <ul style="list-style-type: none"> <li>Membership fees;</li> <li>Grants, including the matching grant available through the Experiences BC program; and,</li> <li>Cooperative advertising programs led by the BC Power and Sail Cruise Tourism Association.</li> </ul> </li> </ul>

## B. Branding and Awareness

### **Strategic Goal:**

**Generate strong awareness about the unique, competitive features of the sector and the destination.**

The goal is to build awareness:

- Amongst key stakeholders in BC; and,
- Within target markets.

The intention is to motivate stakeholders to support the sector and inspire visitors to explore BC's coast.

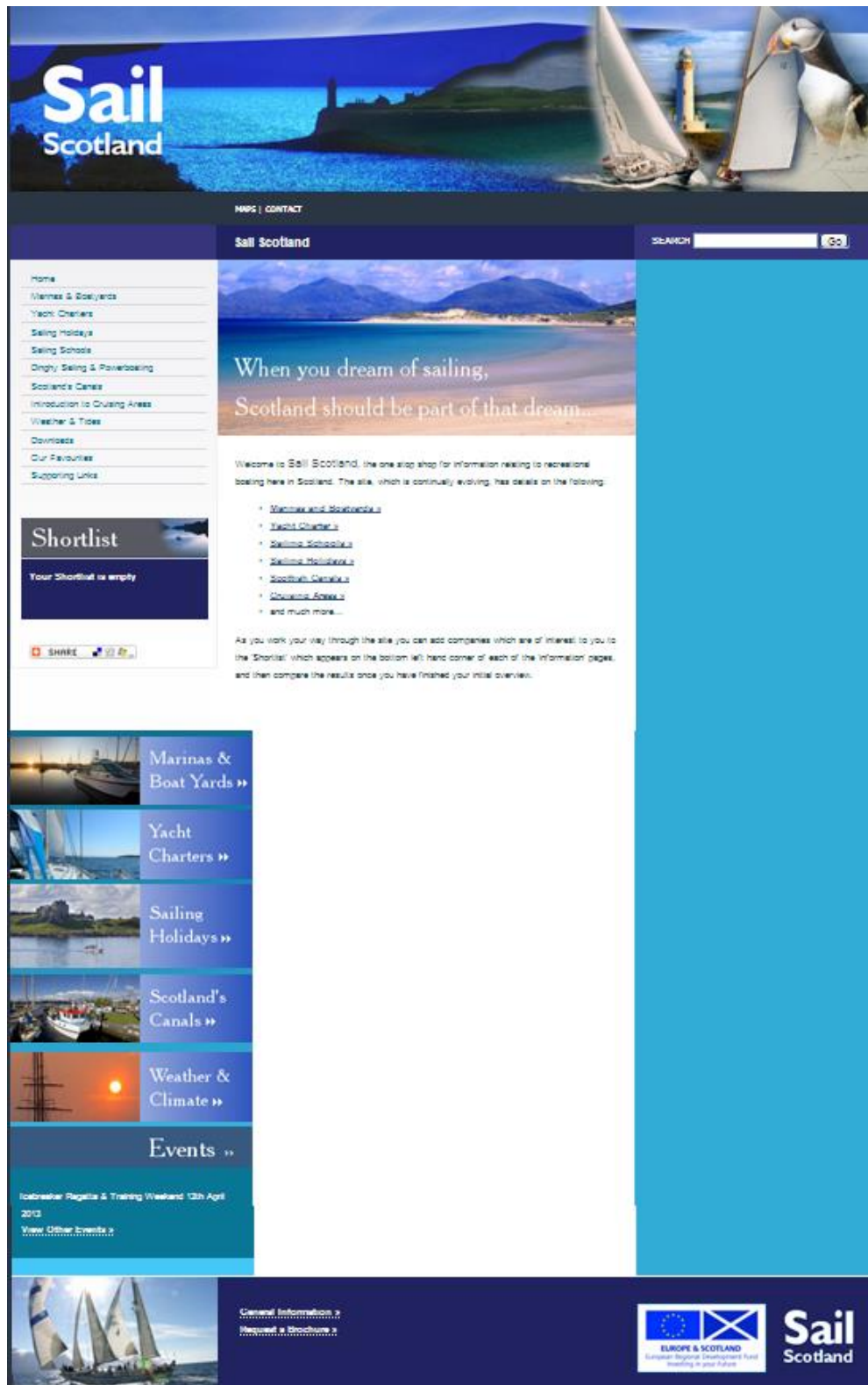
Typically, goals and objectives related to branding are integrated with marketing goals and objectives. However, given that branding will support both internal marketing of the new sector (Stakeholder Engagement) and external marketing to priority markets, the goal and objectives pertaining to branding are presented here. The objectives and initiatives related to branding and awareness will support both *Stakeholder Engagement* and *Marketing* (see subsequent goals).

Objectives	Supporting Initiatives
B-1 Develop a corporate identity for the Power and Sail Cruise Sector Association	<ul style="list-style-type: none"> <li>• Review the corporate identities for other sector associations, including those profiled in the Situation Analysis (as an example, following this table, see Sail Scotland's corporate identity shown on a screen shot of their website)</li> <li>• Design the corporate identity for the Power and Sail Cruise Sector Association possibly with the assistance of a professional firm</li> </ul>
B-2 Create a solid and compelling brand and message for BC's power and sail cruise destination and sector	<ul style="list-style-type: none"> <li>• Review the branding and messaging of other sector associations, including those profiled in the Situation Analysis</li> <li>• As input for the brand development process: <ul style="list-style-type: none"> <li>○ Identify who/which entities will use the brand and messaging; and,</li> <li>○ Identify target audiences for the brand.</li> </ul> </li> <li>• Define the process for creating the brand and messaging, which should include consulting with potential users of the brand and target markets/ audiences.</li> <li>• Engage a qualified firm to work with the sector to develop the brand and messaging and complete the brand development process; note that this includes developing a name for the sector and for the destination.<sup>9</sup></li> </ul>
B-3 Develop and maintain a BC power and sail cruise website to support marketing	<ul style="list-style-type: none"> <li>• Review the websites of other sector associations, including those profiled in the Situation Analysis</li> <li>• As input for the website development process, define the primary functions of the</li> </ul>

<sup>9</sup> Earlier in the Power and Sail Cruise Sector process, the destination and this initiative was referred to as the "BC Marine Highway". However, during the stakeholder consultation process, many stakeholders indicated that this name was not appropriate.

Objectives	Supporting Initiatives
initiatives and stakeholder engagement and communication initiatives	<p>website, such as:</p> <ul style="list-style-type: none"> <li>○ Building awareness about the BC power and sail cruise destination and sector amongst stakeholders and within existing and potential markets;</li> <li>○ Profiling the destination, product, experiences and specific offerings of provided by the sector;</li> <li>○ Providing a communication vehicle to support stakeholder engagement;</li> <li>○ Providing a platform for marketing initiatives;</li> <li>○ Providing information to existing and potential visitors; and,</li> <li>○ Leveraging relevant websites, such as HelloBC.com.</li> </ul> <ul style="list-style-type: none"> <li>• Engage a qualified firm to work with the BC Power and Sail Cruise Tourism Association and its stakeholders to develop the sector website and complete the website development process.</li> <li>• Maintain and update the website on a regular basis.</li> </ul>
B-4 Prepare collateral material to help build awareness about the sector, the destination's unique assets and the sector's products, services and experiences	<ul style="list-style-type: none"> <li>• Using the branding and messaging, together with the research (see Goal G) on the destination's assets products and services, prepare collateral material that will serve as: <ul style="list-style-type: none"> <li>○ Content for the website; and,</li> <li>○ Tools for building awareness about and selling the destination.</li> </ul> </li> <li>• Collateral material may include, for example: <ul style="list-style-type: none"> <li>○ Maps</li> <li>○ Itineraries</li> <li>○ Brochures</li> <li>○ Planning guides</li> <li>○ Other materials.</li> </ul> </li> </ul>

The screenshot of one of Sail Scotland's website pages provides an example of a sector organization's corporate identity, sector branding and the "look" of their website. Please see the following website for additional details: <http://sailscotland.co.uk/>.



## C. Stakeholder Communication and Engagement

### **Strategic Goal:**

***Generate sustained enthusiasm and commitment from stakeholders to support the sector's balanced growth.***

There are a range of stakeholders associated with BC's power and sail cruise sector. Given that the concept of a well-organized tourism sector organization and a well-developed and marketed power and sail cruise destination in BC is new, there is a need to engage and achieve buy-in from stakeholders. The process to develop the Power and Sail Cruise Sector Tourism Plan entailed five workshops in several coastal communities, which served as a "starting point" for engaging stakeholders. Over 100 stakeholders have been involved in the planning process to date.

The Provincial Steering Committee defined the following stakeholders that will be the focus of additional stakeholder engagement going forward. This list is preliminary may be revised and/or expanded.

Preliminary List of Stakeholders	
Marinas (private)	Travel trade
Harbour and port authorities	Customs/border agencies
Charter operators	All levels of government
Boat yards	Media
Attractions and tourism operators	Communities/residents
Ancillary businesses and services	Yacht brokers
Customers/markets	Department of Fisheries and Oceans
Suppliers	Shipping sector
Mechanics and equipment	Cruise ship companies/sector
BC Marine Trades Association	Northwest Marine Trades Association
BC Bareboat Charter Association	Seafood suppliers
Tourism sector associations	Coastguard and auxiliary coastguard
RDMOs and CDMOs <sup>10</sup>	Transportation services
Economic development organizations/offices	Festivals and events
Transport Canada	Rendezvous of brokers' clients
BC Parks and Parks Canada	

<sup>10</sup> Regional Destination Marketing/Management Organizations and Community Destination Marketing/Management Organizations

The objectives and supporting initiatives to support the strategic goal for stakeholder engagement are as follows.

Objectives	Supporting Initiatives
C-1 Generate awareness about and support for the sector and for the Power and Sail Cruise Sector Tourism Plan	<ul style="list-style-type: none"> <li>• Further define and analyze stakeholders by examining: <ul style="list-style-type: none"> <li>○ How they relate to the Power and Sail Cruise sector</li> <li>○ How they can benefit by supporting the sector</li> <li>○ How to best communicate with each type of stakeholder and the purpose of the communication</li> </ul> </li> <li>• Utilizing the stakeholder analysis discussed above, design and implement a communications plan to build awareness about the sector, which may feature: <ul style="list-style-type: none"> <li>○ The brand and messaging, once created</li> <li>○ Aspects of the Sector Tourism Plan and ongoing reporting on the achievement of milestones</li> <li>○ The governance and leadership organization</li> <li>○ Opportunities for stakeholders to support and benefit from the BC Power and Sail Cruise Tourism Association</li> <li>○ The website, once created</li> <li>○ Newsletters and/or e-blasts</li> <li>○ Other collateral materials, once created</li> </ul> </li> <li>• Conduct a baseline economic impact study to demonstrate the economic impacts of the sector to key stakeholders (see <i>G. Research, Evaluation and Monitoring</i>) and communicate the results of this study to relevant stakeholders</li> <li>• Develop and implement an “ambassador program” whereby sector champions feature the sector brand at their marinas and on their boats</li> </ul>
C-2 Encourage communication, coordination and collaboration within the sector	<ul style="list-style-type: none"> <li>• Engage stakeholders in the brand development process (see <i>B. Branding and Awareness</i>)</li> <li>• Utilize the website and communications plan to encourage communication, coordination and collaboration within the sector</li> <li>• Engage key stakeholders in research initiatives, such as the development of an inventory, the conduct of a consumer and/or business survey, and the development of an economic impact study (see <i>G. Research, Evaluation and Monitoring</i>)</li> <li>• Engage stakeholders in initiatives related to developing sector standards and/or a sector code of conduct (see <i>E. Product/Experience Development</i>)</li> <li>• Explore the concept of organizing a symposium to offer opportunities for: <ul style="list-style-type: none"> <li>○ Stakeholder engagement, communication and networking</li> <li>○ Stakeholder education and awareness about best practices, sector trends and sector initiatives</li> <li>○ Stakeholder input to support collaborative sector initiatives</li> </ul> </li> </ul>

#### D. Tourism Marketing

##### **Strategic Goal:**

***Attract existing and emerging target markets to BC's coast to participate in power and sail cruising, particularly during shoulder seasons.***

The Provincial Steering Committee set out the following marketing priorities.

- The immediate focus should be on:
  - Markets that offer most potential return on investment in the short-term; and,
  - Markets that will help increase shoulder season boating traffic.
- From a geographic perspective, the focus should be on short-haul markets, including:
  - British Columbia;
  - Alberta;
  - Washington; and,
  - Saskatchewan (which has a growing economy and a population that is demonstrating increasing interest in boating and boat ownership).
- There is a need to continue exploring long-haul markets, with approximately 10% of marketing efforts/investment dedicated to this. More specifically, opportunities related to the Brazilian market and markets on the east coast of North America should be explored.
- Boater and non-boater (charter) market segments are of equal priority with regard to allocation of marketing efforts.
  - Primary geographic markets for the boater segment are as noted above: BC, Alberta, Washington and Saskatchewan.
  - Secondary geographic markets for the boater segment are: Oregon, California and eastern North America.
  - The geographic markets for the non-boater segment is much broader and includes visitors from many markets who are seeking an experience/holiday of a unique nature, featuring wildlife, outstanding coastal scenery and coastal culture.

The objectives and supporting initiatives to support the strategic goal for marketing are as follows.

Objectives	Supporting Initiatives
D-1 Conduct the required research to support the development and evaluation of power and sail cruise tourism sector marketing initiatives	<ul style="list-style-type: none"> <li>• Establish a data collection program to determine a baseline upon which to measure sector development and growth overall and related to target markets</li> <li>• Conduct an inventory to:               <ul style="list-style-type: none"> <li>○ Gain a more thorough understanding of available product/experiences and product capacity</li> <li>○ Support the development of tourism marketing initiatives, collateral</li> </ul> </li> </ul>



Objectives	Supporting Initiatives
	<p>material and content of the website (note that Pacific Yachting magazine or the Waggoner offers a base upon which to build the inventory)</p> <ul style="list-style-type: none"> <li>• Conduct market and consumer research to further define the needs and interests of target markets</li> </ul>
D-2 Develop the capacity to conduct collaborative marketing initiatives within the sector	<ul style="list-style-type: none"> <li>• Establish programs, guidelines, tools and possibly workshops to encourage stakeholders' strategic use of: <ul style="list-style-type: none"> <li>○ Branding and collateral materials, once developed (see <i>B. Branding and Awareness</i>)</li> <li>○ Itineraries and themed routes, once developed (see <i>E. Product/Experience Development</i>)</li> <li>○ The website</li> <li>○ Other partnership marketing programs developed by the sector, once developed</li> </ul> </li> </ul>
D-3 Establish strategic partnerships with key stakeholders to pursue collaborative tourism marketing initiatives	<ul style="list-style-type: none"> <li>• Identify potential partners (see list of stakeholders under <i>G. Stakeholder Engagement</i>)</li> <li>• Identify existing and define new marketing initiatives that will be of mutual benefit to the sector and to the partners: <ul style="list-style-type: none"> <li>○ Web-based initiatives</li> <li>○ Tradeshows/boating shows</li> <li>○ Media relations</li> <li>○ Travel guides (e.g., related to PDMOs, RDMOs, CDMOs)<sup>11</sup></li> <li>○ Others</li> </ul> </li> <li>• Based on this assessment, develop a plan to collaborate with selected partners on strategic tourism marketing initiatives</li> </ul>
D-4 Prepare a three-year sector tourism marketing plan	<ul style="list-style-type: none"> <li>• Once sufficient research and analysis has been completed, prepare a realistic three-year sector marketing plan that defines: <ul style="list-style-type: none"> <li>○ Available product/experiences and seasonal capacity</li> <li>○ Target markets and their characteristics</li> <li>○ Market – product analysis that relates BC product to target markets</li> <li>○ Growth targets related to the sector and, if possible, related to target markets</li> <li>○ Marketing initiatives to achieve the targets</li> <li>○ An implementation schedule and budget</li> <li>○ Measures of success</li> <li>○ An accountability framework</li> </ul> </li> </ul>

<sup>11</sup> Provincial Destination Marketing/Management Organizations, Regional Destination Marketing/Management Organizations, Community Destination Marketing/Management Organizations

## E. Tourism Product/Experience Development

### **Strategic Goal:**

***Ensure BC's power and sail cruise products and experiences exceed the expectations of existing and new visitors, while maintaining the environmental and cultural integrity of the destination.***

When preparing objectives and initiatives to support the product/experience development goal, the Provincial Steering Committee made several observations, as noted below.

- Customer needs and expectations should be central to the product and experience offered.
- First Nations involvement is fundamental to the power and sail cruise experience.
- The focus of product and experience development is not so much about developing “new” product, but leveraging and enhancing existing products through collaborative initiatives and the development of themed routes.
- There is a need to establish:
  - Consistently high service standards; and,
  - Consistently high environmental standards.
- There is a need to develop and use common formats for communicating products, services and experiences to existing and potential visitors.
- There is a need to create linkages between the sector, the product/experience, supporting hospitality services and residents.

Objectives	Supporting Initiatives
E-1 Conduct the required research to support tourism product and experience enhancement and development	<ul style="list-style-type: none"> <li>• Conduct an inventory to:               <ul style="list-style-type: none"> <li>○ Gain a more thorough understanding of available product/experiences and product capacity; and,</li> <li>○ Support the development of tourism marketing initiatives, collateral material and content of the website</li> </ul> </li> </ul>
E-2 Encourage high standards of environmental and cultural stewardship within the sector	<ul style="list-style-type: none"> <li>• Conduct research related to:               <ul style="list-style-type: none"> <li>○ Existing practices of BC operators; and,</li> <li>○ Existing programs – such as the GSA Green Marine Program and other potential programs – that the sector could employ or adapt to help ensure that sector operators meet high-levels of environmental stewardship.</li> </ul> </li> <li>• Adopt and adapt an existing program and/or develop a set of best practices for the sector, with input from key stakeholders.</li> <li>• Design a recognition program to acknowledge operators that adhere to the program and/or to the best practices.</li> </ul>
E-3 Enhance the visitor	<ul style="list-style-type: none"> <li>• Develop a program and format for providing information pertaining to onshore</li> </ul>

Objectives	Supporting Initiatives
experience by making visitors aware of the diversity of products and services available	<p>and offshore experiences to visitors that includes information about the range of experiences, and supporting facilities and services, along the coast. To support this initiative:</p> <ul style="list-style-type: none"> <li>○ Prepare a common template/format for providing this information, ensuring that this reflects the new branding and messaging for the sector;</li> <li>○ Develop a process for the regular updating of this information, to ensure that it is current; and,</li> <li>○ Provide appropriate platforms for distributing this information to existing and prospective visitors (website(s), PDMO, RDMOs, CDMOs, etc.).</li> </ul> <ul style="list-style-type: none"> <li>• Promote communication and collaboration amongst and between sector operators to ensure that they provide information about the range of coastal experiences along the BC coast to their customers (see <i>B. Stakeholder Communication and Engagement</i>).</li> <li>• Use social media to support the above two initiatives.</li> </ul>
E-4 Encourage the sector to provide consistently high standards of service	<ul style="list-style-type: none"> <li>• Develop a service standards program, such as “Marine Host” (note that Prince Rupert<sup>12</sup> is currently developing a program such as this), focusing on: <ul style="list-style-type: none"> <li>○ Service standards;</li> <li>○ Provision of local, regional and provincial information; and,</li> <li>○ Safety standards.</li> </ul> </li> <li>• Link this program with the environmental stewardship and/or best practices initiative.</li> </ul>
E-5 Develop themed routes and/or areas that appeal to existing and emerging markets	<ul style="list-style-type: none"> <li>• Conduct research related to other jurisdictions that have developed themed boating routes and/or areas.</li> <li>• Design, implement, promote and evaluate a pilot test for one themed route: <ul style="list-style-type: none"> <li>○ Establish a committee to champion the development, implementation and evaluation of the selected themed route that will be tested;</li> <li>○ Identify the elements of the experience that are important for a themed route that will appeal to key markets;</li> <li>○ Identify candidate themed routes for the pilot test;</li> <li>○ Select the best candidate for the pilot test; and,</li> <li>○ Proceed with the design, implementation and testing.</li> </ul> </li> <li>• Depending on the success of the pilot test, develop a more formalized program for the development and promotion of future themed routes.</li> </ul>

<sup>12</sup> Two programs are currently being developed in Prince Rupert:

- One program is being developed for guides and will include levels of certification that relate to safety in addition to other factors.
- One program is an ambassador program that targets staff in the sector and focuses on visitor servicing.

## F. Operating Environment

### **Strategic Goal:**

***Help provide a business and operating environment that supports the balanced growth of the sector.***

The Provincial Steering Committee, in addition to other stakeholders consulted during the planning process, indicated that the mandate of the BC Power and Sail Cruise Tourism Association should include serving as a collective voice for the sector with regard to addressing priority barriers that affect the sector's ability to realize the vision. Barriers that the sector faces may relate, for example, to customs regulations, deficiencies in infrastructure, coast guard regulations and human resource supply constraints. During the Provincial Steering Committee workshops, the BCMTA's role with regard to working collectively addressing barriers of collective concern was discussed. There are opportunities for the Power and Sail Cruise Tourism Sector and the BCMTA to work collaboratively to address priority barriers.

Objectives	Supporting Initiatives
F-1 Identify and monitor barriers to sector growth and, where resources permit, work to address priority barriers to help ensure that the sector can deliver outstanding and safe power and sail cruise experiences	<ul style="list-style-type: none"> <li>Establish an ongoing process for identifying and addressing critical policy, regulatory, and infrastructure barriers. This process may include, for example: <ul style="list-style-type: none"> <li>Discussions with the BCMTA about potential collaboration on barriers of collective concern;</li> <li>Regular communication with sector stakeholders regarding critical barriers;</li> <li>Maintaining communication with the policy division of relevant provincial ministries (currently the Ministry of Jobs, Tourism and Skills Training) to ensure they are aware of priority barriers that may relate to government;</li> <li>Identifying key authorities responsible for specific policies, regulations and/or legislation and establishing a relationship with key authorities; and,</li> <li>Working with partners, including the provincial government, to address priority barriers.</li> </ul> </li> <li>Note that: <ul style="list-style-type: none"> <li>The scope of issues/barriers that will typically be monitored and addressed should be discussed and determined once the board has been established; and,</li> <li>A limit to the resource levels (time and money) dedicated to this initiative must also be set.</li> </ul> </li> </ul>

## G. Research, Monitoring and Evaluation

### **Strategic Goal:**

***Provide essential research, monitoring and evaluation to support the balanced growth of the sector.***

The Provincial Steering Committee has indicated that sound research is required to support the implementation, monitoring and evaluation of the Power and Sail Cruise Sector Tourism Development and Marketing Plan. At the same time, the Provincial Steering Committee recognizes that research programs can be expensive and, therefore, there will be a need to be selective with regard to the type and amount of research that is conducted.

Research initiatives were also presented under several of the other goals and objectives, and most notably under *D. Tourism Marketing* and *E. Tourism Product/Experience Development*. **It should be noted that the Situation Analysis contains a significant amount of currently available research and should be referred to when preparing a research plan for the sector.**

Objectives	Supporting Initiatives
G-1 Acquire, coordinate and/or conduct essential research to support the implementation, monitoring and evaluation of the Sector Tourism Plan	<ul style="list-style-type: none"> <li>Develop a cost-effective research program that focuses on the following types of research (note that these are examples of the types of research required, based on the stakeholder workshops that led to the development of the Situation Analysis): <ul style="list-style-type: none"> <li>Profiling existing products and experiences, including inventories that document marina capacity on a seasonal basis and guided vessel capacity;</li> <li>Profiling existing and emerging target markets with regard to: <ul style="list-style-type: none"> <li>Market size</li> <li>Market origin</li> <li>Seasonality</li> <li>Experience levels</li> <li>Demographic/ psychographic segmentation</li> </ul> </li> <li>Understanding levels of awareness within target markets about BC's power and sail cruise experiences;</li> <li>Trends related to boat size and boat sales;</li> <li>Competitive intelligence;</li> <li>Consumer/ business surveys, conducted in association with BC operators;</li> <li>Economic impacts of the sector;</li> <li>Visitor satisfaction; and,</li> <li>Monitoring of website utilization.</li> </ul> </li> <li>Develop a three-year research plan and budget, once priority research needs have been identified.</li> </ul>
G-2 Prepare and implement a monitoring and evaluation framework	<ul style="list-style-type: none"> <li>Develop a framework to monitor and evaluate progress with regard the implementation of the Tourism Sector Plan and development of the sector. As a component of this framework, identify and collect baseline indicators and measures to enable monitoring of the sector's growth and success.</li> </ul>

## 6.0 Implementation Schedule and Immediate Next Steps

This section presents an implementation schedule for the goals, objectives and supporting initiatives and the immediate next steps recommended to ensure that the momentum gained through the planning process will continue through to implementation.

### Implementation Schedule

A three-year implementation schedule is presented on the following pages. For the purposes of this Sector Tourism Plan, Year 1 is January to December 2013. However, when the BC Power and Sail Tourism Association is established and incorporated, the Board of Directors may define their operating and fiscal year differently.

The detailed initiatives that support each of the goals and objectives noted in the implementation plan are documented in the previous section of the sector plan.

### Three-Year Implementation Schedule

POWER AND SAIL CRUISE TOURISM SECTOR PLAN GOALS AND OBJECTIVES	Year 1 <sup>13</sup>		Year 2		Year 3		Ongoing
	Start	Finish	Start	Finish	Start	Finish	
<b>A. SECTOR LEADERSHIP AND FUNDING</b> <i>Establish strong and enduring sector leadership, coordination and funding</i>							
1. Establish governance model and structure							
2. Establish management structure							
3. Establish membership model							
4. Establish 3-year operating plan, budget and funding model							
<b>B. BRANDING AND AWARENESS</b> <i>Generate strong awareness about the unique, competitive features of the sector and the destination</i>							
1. Develop a corporate identity							
2. Create a solid and compelling brand and message							
3. Develop and maintain a website	Start			Finish			Refresh/maintain
4. Prepare collateral material							Add new materials
<b>C. STAKEHOLDER ENGAGEMENT</b> <i>Generate sustained enthusiasm and commitment from stakeholders to support the sector's balanced growth</i>							
1. Generate awareness about and support for sector and plan							
2. Encourage communication, coordination and collaboration							

<sup>13</sup> Year 1 is assumed to be January to December 2013 (however, when the BC Power and Sail Tourism Association is established and incorporated, the Board of Directors may define their operating and fiscal year differently).

POWER AND SAIL CRUISE TOURISM SECTOR PLAN GOALS AND OBJECTIVES		Year 1 <sup>13</sup>		Year 2		Year 3		Ongoing
		Start	Finish	Start	Finish	Start	Finish	
D. MARKETING								
Attract existing and emerging target markets to BC's coast to participate in power and sail cruising, particularly during shoulder seasons								
1.	Conduct required research to support development of marketing initiatives							
2.	Develop capacity to conduct collaborative tourism marketing within sector			Start		Cont'd		
3.	Establish strategic partnerships with key stakeholders			Start		Cont'd		
4.	Prepare succinct three-year Sector Tourism Marketing Plan							
E. PRODUCT/EXPERIENCE DEVELOPMENT								
Ensure BC's power and sail cruise products and experiences exceed the expectations of existing and new visitors, while maintaining the environmental and cultural integrity of the destination								
1.	Conduct required research to support tourism product development							
2.	Encourage high standards of environmental and cultural stewardship							
3.	Enhance visitor experience by making aware of product and services							
4.	Encourage the sector to provide consistently high standards of service							
5.	Develop themed and/or areas that appeal to existing and emerging markets							
F. OPERATING ENVIRONMENT								
Provide a business and operating environment that supports the balanced growth of the sector								
1.	Identify/ monitor barriers and, where resources permit, address priority barriers							Include in Operating Plan
G. RESEARCH, MONITORING AND EVALUATION								
Provide essential research, monitoring and evaluation to support the balanced growth of the sector								
1.	Acquire, coordinate and/or conduct essential research to support sector							
2.	Prepare and implement a monitoring and evaluation framework							



### Immediate Next Steps – Year 1

The following next steps for Year 1 are critical to ensure the Power and Sail Cruise Tourism Association is established and the foundational work is completed to enable the sector to mature. These timelines were defined with input from the Steering Committee.

YEAR 1 - IMPLEMENTATION		WHO	WHEN
<b>A. SECTOR LEADERSHIP AND FUNDING</b>			
A-1	Establish the governance model and structure <ul style="list-style-type: none"> <li>Name search</li> <li>Constitution</li> <li>Inaugural board (draw from Steering Committee)</li> <li>Legal entity</li> </ul>	Governance Sub-Committee	By August 2013
	Establish the first board	Governance Sub-Committee	Fall 2013
A-2	Establish the management structure	Governance Sub-Committee	Fall 2013
A-3	Establish the membership model	Governance Sub-Committee	Fall 2013
A-4	Establish 3-Year Operating Plan and budget	Governance Sub-Committee	By December 2013
<b>B. BRANDING AND AWAREESS</b>			
B-1	Develop corporate identity	Governance Sub-Committee	By August 2013
B-3	Develop website (start)	Selected members of Steering Committee	Start in September 2013 Complete in 2014
<b>C. STAKEHOLDER ENGAGEMENT</b>			
C-1	Generate awareness and support		
	<b>Regular Communication with Steering Committee</b> <ul style="list-style-type: none"> <li>Communicate regularly with the Steering Committee regarding progress and milestones and to seek assistance with implementation of the Sector Plan</li> </ul>	Governance Sub-Committee	Monthly Steering Committee teleconference during 2013
	<b>Post-planning Communication with Stakeholders</b> <ul style="list-style-type: none"> <li>Obtain list of stakeholders involved in process to date</li> <li>Prepare announcement about the formation of the Power and Sail Cruise Tourism Association</li> <li>Include highlights from the Power and Sail Cruise Tourism Sector Plan and indicate how the full document</li> </ul>	Governance Sub-Committee to lead this Steering Committee members to support this	By June 2013

YEAR 1 - IMPLEMENTATION		WHO	WHEN
	<p>can be obtained</p> <ul style="list-style-type: none"> <li>Distribute this to all stakeholders who have been involved in the process to date, in addition to other key stakeholders</li> <li>Have Steering Committee members distribute this communication to their respective networks of stakeholders</li> </ul>		
	<p><b>Ongoing Regular Communication with Stakeholders</b></p> <ul style="list-style-type: none"> <li>Develop a communication plan and schedule: <ul style="list-style-type: none"> <li>Use a simple template for periodic one-page updates</li> <li>Primarily use email distribution</li> <li>Decide upon frequency (possibly quarterly)</li> </ul> </li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p>	<p>After the June 2013 communication noted above, issue communication quarterly</p>
C-2	Encourage communication, coordination and collaboration amongst stakeholders	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p>	Start in September 2013
	<p><b>Fall Steering Committee Meeting</b></p> <ul style="list-style-type: none"> <li>Work with Tourism BC to host a Steering Committee meeting to report on progress to date, establishment of the Association and confirmation of the Board</li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p> <p>Tourism BC</p>	Host in fall 2013
	<p><b>Broader Stakeholder Meeting (Following Steering Committee Meeting)</b></p> <ul style="list-style-type: none"> <li>Consider working with Tourism BC to host a broader stakeholder session following the fall Steering Committee meeting to update existing stakeholders and engage new stakeholders</li> </ul>	<p>Governance Sub-Committee</p> <p>Selected members of Steering Committee</p> <p>Tourism BC</p>	Host in fall 2013
<b>D. MARKETING</b>			
D-1	<p>Conduct the required research to support the development of marketing initiatives</p> <ul style="list-style-type: none"> <li>Start assembling existing research and identifying gaps and research priorities (refer to Situation Analysis)</li> <li>Do this in conjunction with Tourism BC's Research , Planning and Evaluation Branch</li> <li>Coordinate this with E-1 and G-1</li> </ul>	Selected members of Steering Committee	Start in fall 2013 and continue to build in subsequent years
<b>E. PRODUCT/EXPERIENCE DEVELOPMENT</b>			
E-1	<p>Conduct the required research to support product development</p> <ul style="list-style-type: none"> <li>Start assembling existing research and identifying gaps</li> </ul>	Selected members of Steering Committee	Start in fall 2013 and continue to build in subsequent years

YEAR 1 - IMPLEMENTATION		WHO	WHEN
	and research priorities (refer to Situation Analysis) <ul style="list-style-type: none"> <li>Do this in conjunction with Tourism BC's Research , Planning and Evaluation Branch</li> <li>Coordinate this with D-1 and G-1</li> </ul>		
<b>F. OPERATING ENVIRONMENT</b>			
F-1	Identify/monitor barriers and, where resources permit, address priority issues <ul style="list-style-type: none"> <li>Develop the process for identifying and monitoring barriers</li> <li>Include this in the Three-Year Operating Plan developed under A. Sector Leadership and Funding</li> </ul>	Governance Sub-Committee	By December 2013
<b>G. RESEARCH, MONITORING AND EVALUATION</b>			
G-1	<ul style="list-style-type: none"> <li>Acquire, coordinate and/or conduct essential research to support the sector</li> <li>Develop a three-year research plan and budget</li> <li>Coordinate this with D-1 and E-1</li> </ul>	Selected members of Steering Committee	Start in fall 2013 and continue to build in subsequent years
G-2	Prepare and implement a monitoring and evaluation framework for the Power and Sail Tourism Sector Plan and for sector performance more broadly	Selected members of Steering Committee	Complete framework in 2013

## Appendix A – Visitor Characteristics, Trends and Growth (Detail)

### Highlights from the Travel Activities and Motivation Survey (TAMS)

**Understanding existing and potential visitor markets and their characteristics, as well as developing effective marketing strategies that attract and/or retain these markets, is crucial to increasing the economic viability of a tourism sector.** The following market-related research is based on Travel Activities and Motivations (TAMS) 2006 data for both Canadian and US travellers. Note that a more detailed summary of the TAMS research is presented in Appendix A.

The research represents those travellers who took an overnight pleasure trip in 2004/2005 where power and/or sail cruising was either a motivating factor for a trip or an activity they participated in while on a trip. Telephone surveys were conducted using a sample of Canadian and US residents. The sample results were projected to the total Canadian and US adult populations.

Some of the Canadian data is further segregated into residents from BC and residents from Alberta, as these two markets are particularly important for BC's power and sail cruising sector. Similarly, some of the US data is further segregated into Washington State residents, given the importance of this market to BC's power and sail cruising sector.

*Please note:*

- *The Canadian and US TAMS surveys differ slightly; therefore, the way the data is presented for the Canadian results may differ from the way the data is presented for the US results for some questions.*
- *Although the TAMS data is very useful, it does have its limitations. The main limitation is that it cannot be confirmed whether visitors motivated by or participating in power and sail cruising were visitors to BC or elsewhere in the world. What is certain is that they were motivated to travel by, or they did participate in, power and/or sail cruising sometime between 2004 and 2005.*

### Market Size

*Canadians:*

- 18.5 million took at least one overnight trip during the 2004 – 2005 period.
- 21.0 % of these people participated in power/sail cruising.
- **5.0 % of these people were motivated to travel for power/sail cruising (an estimated 0.9 million people).**

*Americans:*

- 170.5 million took at least one overnight trip during the 2004 – 2005 period.
- 11.0 % of these people participated in power/sail cruising.

- **3.0 % of these people were motivated to travel for power/sail cruising (an estimated 5.2 million people).**

## Gender

### Canadians:

- Based on the estimated 926,307 Canadians **motivated** to take a power/sail trip:
  - *58% were men; and,*
  - *42% were women.*

### Americans:

- Based on the estimated 5.3 million Americans **motivated** to take a power/sail trip:
  - *58% were men; and,*
  - *42% were women.*
- Based on the estimated 130,912 Washington State residents **motivated** to take a power/sail trip:
  - *62% were men; and,*
  - *38% were women.*

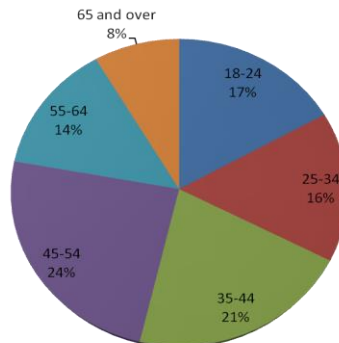
The guided charter sector tends to attract slightly more females than males.

## Age

### Canadians:

The following graph presents a breakdown by age category of the Canadian respondents who were motivated to travel for power/sail cruising (an estimated 0.9 million people). The majority (67%) of these travelers are 36 years of age or older, which is similar to the American survey results (see next graph).

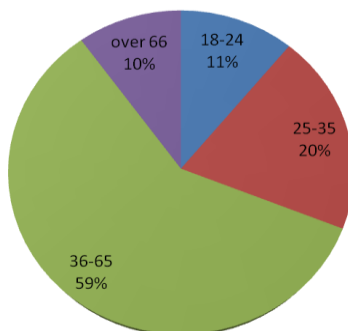
**Ages of Canadians Motivated to Travel for Power/Sail Cruising**



### Americans:

The following graph presents a breakdown by age category of the American respondents who were motivated to travel for power/sail cruising (an estimated 5.2 million people). The majority (69%) of these travelers are 36 years of age or older (see preceding graph).

### Ages of Americans Motivated to Travel for Power/Sail Cruising



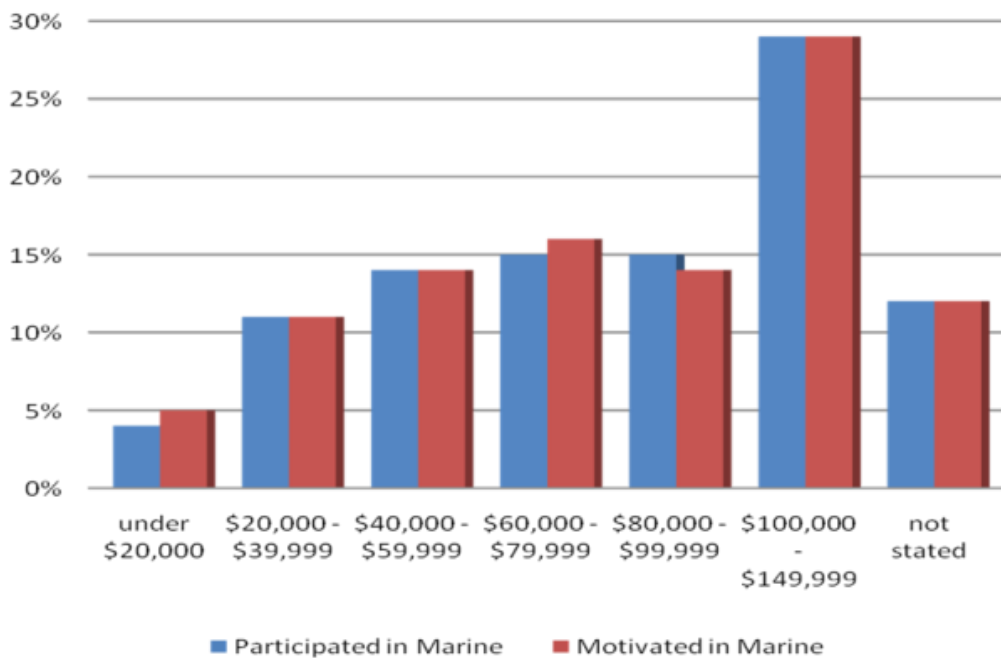
### Income

#### Canadians:

The following graph presents the household income levels of the Canadian respondents, including those who “participated” in and those who were “motivated” by power and sail cruising. The survey results reveal that:

- There is little difference in household income levels between the two types of respondents; and,
- The largest proportion of respondents (close to 30%) is in the \$100,000 - \$149,999 income category, suggesting that this market sector is relatively affluent.

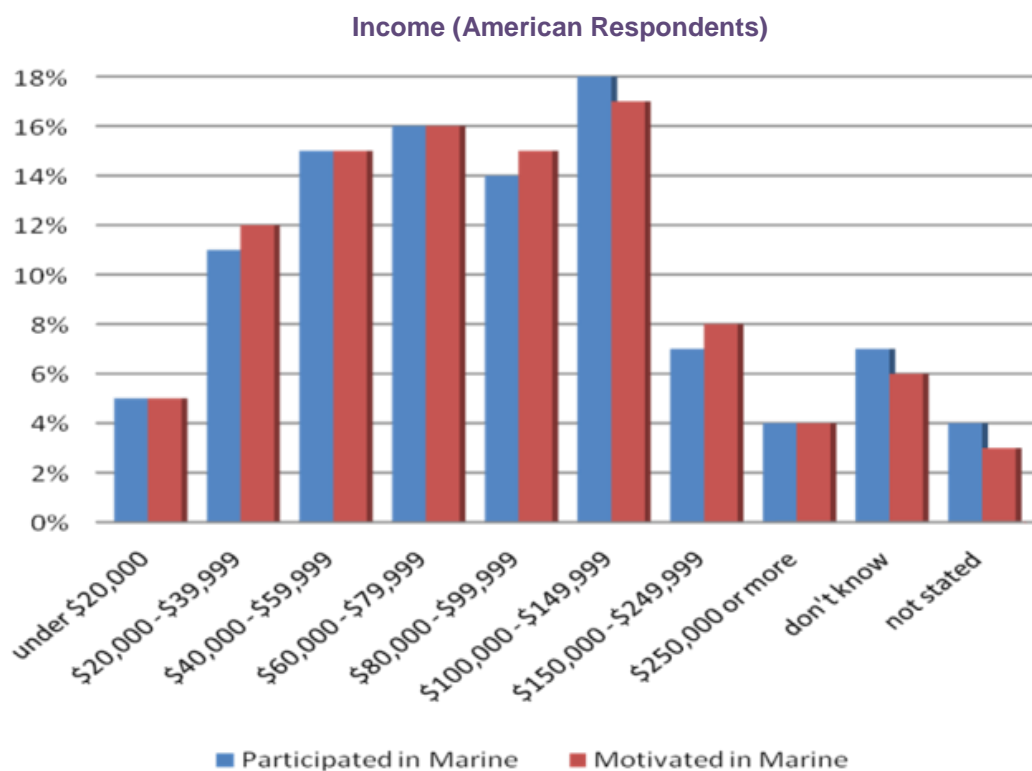
### Income (Canadian Respondents)



#### Americans:

The following graph presents the household income levels of the American respondents, including those who “participated” in and those who were “motivated” by power and sail cruising. The survey results reveal that:

- There is little difference in household income levels between the two types of respondents;
- The income levels for the American respondents are more evenly distributed across the income categories, relative to the Canadian sample.
  - The largest proportion of respondents (close to 18%) is in the \$100,000 - \$149,999 income category, whereas the proportion of Canadian respondents in this income category was close to 30%.



#### Use of the Internet

The following tables provide survey results related to personal use of the Internet. For both the American and Canadian respondents, the survey results shown in the first table indicate that a higher proportion of travellers motivated to travel for power and sail cruising use the Internet compared to the all American and all Canadian travellers. This suggests that the Internet could be a useful tool for reaching the power and sail cruising market. The second table reveals that both the American and Canadian respondents use the Internet for travel, shopping and entertainment related information. A higher proportion of Americans than Canadians indicated that they use the Internet for shopping (49% versus 26%).

It should be noted that these research results are based upon interviews conducted in 2006. Given the dynamic nature of Internet technology and use, these research results would likely be considerably different now.

Use of Internet As source of Information for Personal Reasons (not work-related)	%
All American travelers	81%
<b><i>American travelers motivated to travel for power/sail</i></b>	<b>84%</b>
All Canadian travelers	83%
<b><i>Canadian travelers motivated to travel for power/sail</i></b>	<b>88%</b>

Common Websites Used	Travel	Shopping	Entertainment
American travelers motivated to travel for power/sail	48%	49%	48%
Canadian travelers motivated to travel for power/sail	46%	26%	44%

### Activities While on Vacation

The following survey results indicate the types of activities that the general travelling population and the travelling population motivated to travel for power and sail cruising like to do while on a vacation. This type of research could be important to the BC power and sail cruising sector in the future, if the sector wishes to partner with other sectors, develop product packages, and conduct marketing related to a broader power and sail cruising product.

#### *Canadians:*

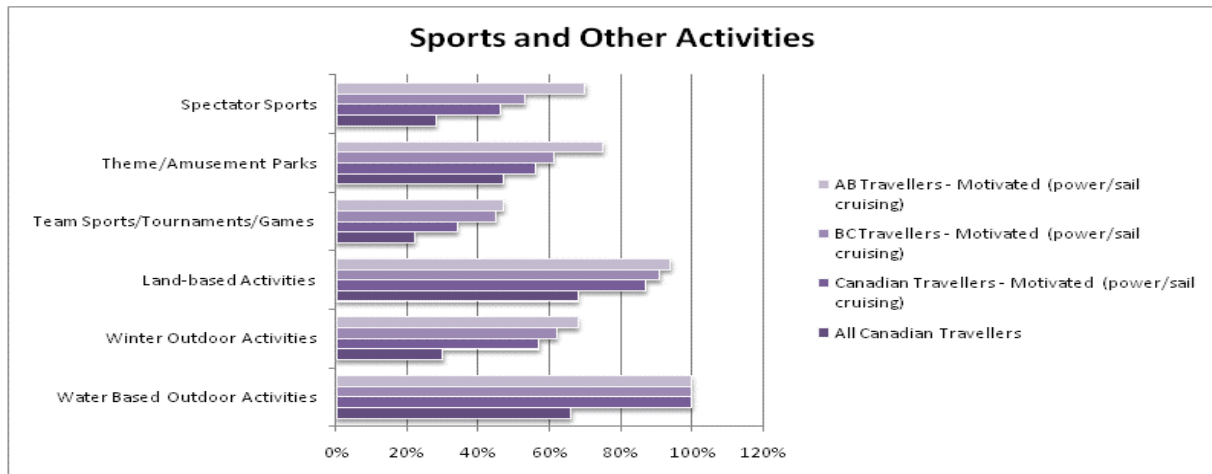
The following graphs show the types of activities that Canadian travelers participate in while on a vacation, based on the TAMS survey results.

Referring to the first graph (Sport and Other Activities), the data suggests that the respondents motivated to travel for power and sail cruising (broken down by Canadian, BC, and Alberta travelers) are more active than the “All Canadian Travellers” segment. Higher proportions of those motivated by power and sail cruising indicated that they attend spectator sports and theme/amusement parks and participate in team sports, land based recreational activities, winter outdoor activities and, of course, water-based outdoor activities (which includes the main activity driving their vacation: power and sail cruising).

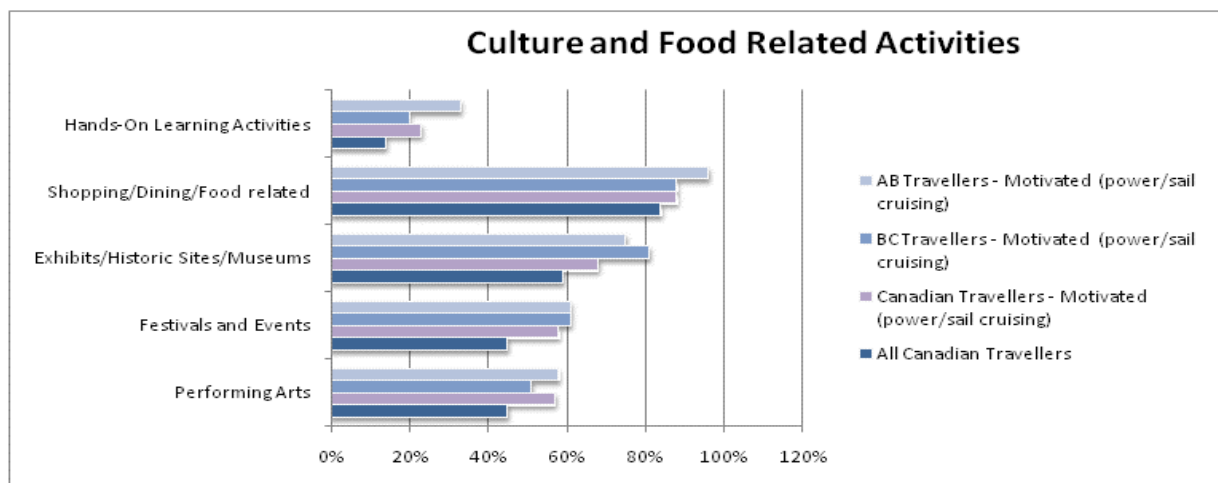
Referring to the second graph (Culture and Food Related Activities), the data suggests that the respondents motivated to travel for power and sail cruising are slightly more interested in cultural and food related activities while on a vacation than the “All Canadian Travellers” segment.



### Sport and Other Activities While on Vacation (Canadian Respondents)



### Culture and Food Related Activities While on Vacation (Canadian Respondents)



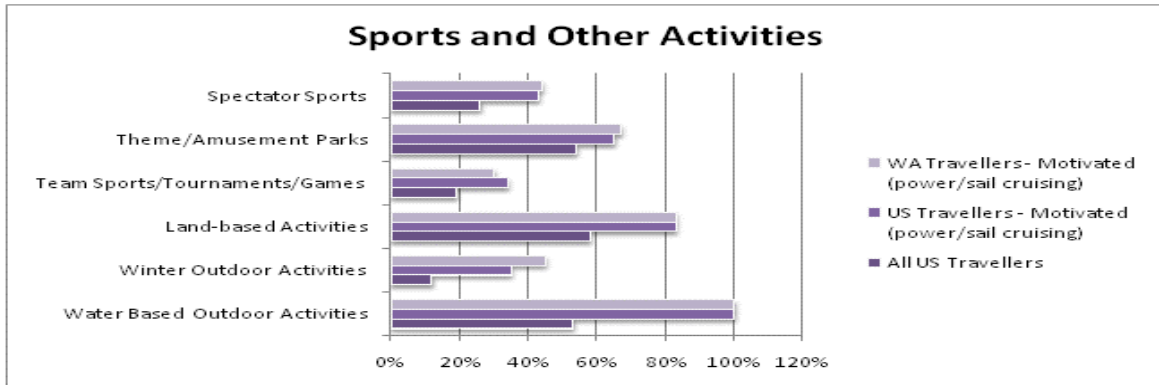
#### Americans:

The following graphs show the types of activities that American travelers participate in while on a vacation, based on the TAMS survey results.

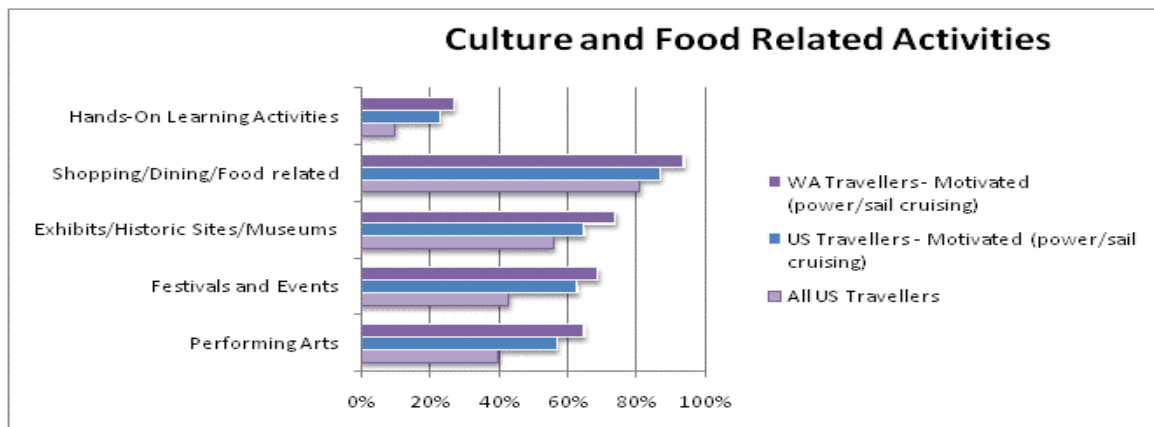
Referring to the first graph (Sport and Other Activities), the data suggests that the respondents motivated to travel for power and sail cruising (broken down by Washington State and American travelers) are more active than the “All American Travellers” segment, which is similar to the Canadian survey results presented above. Higher proportions of those motivated by power and sail cruising indicated that they attend spectator sports and theme/amusement parks and participate in team sports, land based recreational activities, winter outdoor activities and, of course, water-based outdoor activities (which includes the main activity driving their vacation: power and sail cruising).

Referring to the second graph (Culture and Food Related Activities), the data suggests that the respondents motivated to travel for power and sail cruising are slightly more interested in cultural and food related activities while on a vacation than the “All American Travellers” segment. Again, these survey results are similar to those presented above for the Canadian respondents.

### Sport and Other Activities While on Vacation (American Respondents)



### Culture and Food Related Activities While on Vacation (American Respondents)



### The Outdoor Recreation Study

A study of BC residents – *The Outdoor Recreation Study* – was conducted in 2009 and 2010 to understand residents' outdoor activity choices and preferences.

- 20% of respondents participated in sailing or motorized boating on the ocean in previous 12 months.
- They were primarily from coastal areas.
- Of all respondents:
  - Females were slightly more likely to sail on the ocean (10% females vs. 9% males); and,

- Males were slightly more likely to motor boat on the ocean (16% males vs. 14% females).
- The most popular activities of BC residents that had sailed and motor boated on the ocean in the 12 months preceding the survey were:

Sailing	Motorized Boating
Hiking (day)	Hiking (day)
Oceanside Beach Activities	Oceanside Beach Activities
Road Biking or Cycling	Swimming (lake or river)
Swimming (lake or river)	Road Biking or Cycling
Swimming (ocean)	Swimming (ocean)
Beach Activities (lake or river)	Nature Viewing/Scenic Photography
Nature Viewing/Scenic Photography	Saltwater Fishing

### BC Small Craft Harbour Survey

A BC Small Craft Harbour Survey was conducted in January 2009<sup>14</sup>. A total of 23 responses to the survey were received, primarily from small craft harbours in the Vancouver Island and Sunshine Coast areas. Selected results from this survey are presented in the tables below. Key observations regarding this research are as follows:

- Leisure/transient business was increasing prior to 2009.
- There is approximately equal allocation of dock space for commercial fishing vessels (CFVs) and leisure vessels.
- Overall, there appears to be limited coordinated promotion to the leisure market.
- Leisure/transient market appears to be dominated by Canadian (60%) and US (40%) markets (this is an average for BC and recognizes that market origin proportions will vary along the coast).

Visitation Characteristics	
Vessels seeking moorage along BC coast (est.)	<ul style="list-style-type: none"> <li>• 34,400 annually (BC)*</li> <li>• Increased 37% from 2007 to 2009</li> </ul>
Average stay (est.)	<ul style="list-style-type: none"> <li>• 2 days</li> </ul>
Average # people/vessel (est.)	<ul style="list-style-type: none"> <li>• 3 people</li> </ul>
Geographic origin (est.)	<ul style="list-style-type: none"> <li>• 40% US</li> <li>• 60% Canadian</li> </ul>

\* Survey results extrapolated to apply to BC as a whole

<sup>14</sup> Conducted by David Mailloux, Nanaimo Port Authority

Supply Characteristics	
Small craft harbours (BC)	<ul style="list-style-type: none"> <li>80 (est.)</li> </ul>
Private marinas (est.)*	<ul style="list-style-type: none"> <li>200 (as per Pacific Yachting Blue Pages)</li> </ul>
Dock space allocation (est.)	<ul style="list-style-type: none"> <li>51% - commercial fishing vessels (CFVs)</li> <li>49% - pleasure/transient vessels</li> </ul>

\* Not derived from the survey

Key Trends & Estimated Spending	
Commercial fishing vessel business	<ul style="list-style-type: none"> <li>Down approximately 13% from 2005 to 2009</li> </ul>
Leisure/transient vessel business	<ul style="list-style-type: none"> <li>Up approximately 37% from 2007 to 2009</li> </ul>
Promotion	<ul style="list-style-type: none"> <li>17 of the 23 harbours are promoting to visitors</li> <li>5 of the 23 harbours reported having websites</li> <li>1 harbour indicated that "we wave as they go by!"</li> </ul>
Estimated direct spending (annual)	<ul style="list-style-type: none"> <li>\$13.76 million <ul style="list-style-type: none"> <li>Assuming 34,400 leisure vessels annually</li> <li>Assuming average spend of \$400 per vessel</li> </ul> </li> </ul>

### BC Provincial Marine Park Boating Attendance Trends

Boating attendance for the provincial coastal marine parks that track boating traffic is summarized below. Note that a complete listing of all the provincial coastal marine parks and protected areas in BC is provided at the end of the next section. Key observations regarding the boating attendance figures are as follows.

- Parks that are closer to larger population centres tend to receive the highest number of boaters. The parks that received the highest number of boaters in 2010/11 are:
  - Desolation Sound Marine Park: 35,130 boating parties
  - Montague Harbour Marine Park: 16,749 boating parties
  - Newcastle Island Marine Park: 16,352 boating parties
  - Princess Louisa Marine Park: 12,278 boating parties
- Boating attendance has varied considerably park-to-park, with some parks experiencing considerable growth and others experiencing declining attendance.
- Overall, boating attendance has grown over the last several years, from just over 100,000 in 2007/08 to close to 125,000 in 2010/11. This represents overall growth of over 17% and average annual growth of 6%.
- Overall, there was a 1.7% decline in boating attendance from 2009/10 to 2010/11. BC Parks noted that, during this period, there was a significant decline in yacht operators

travelling from Seattle to parks such as Desolation Sound and Princess Louisa Marine Park. BC Parks also noted that marine park attendance is strongly affected by weather.

Marine Park	07/08	08/09	09/10	10/11	Growth %	Growth %
Desolation Sound Marine Park	23,197	13,392	36,851	35,130	51.44%	17%
Dionisio Point Park	598	275	-	-	-100.00%	-33%
Discovery Island Marine Park	269	1,072	1,082	1,638	508.92%	170%
Gowlland Tod Park	2,448	7,408	7,885	6,150	151.23%	50%
Halkett Bay Park	355	230	438	230	-35.21%	-12%
Jedediah Island Marine Park	6,294	6,954	6,301	6,285	-0.14%	0%
Mansons Landing Park	819	2,189	90	150	-81.68%	-27%
Mitlenatch Island Nature Park	-	-	-	1,814	100.00%	33%
Montague Harbour Marine Park	16,704	17,165	18,506	16,749	0.27%	0%
Newcastle Island Marine Park	25,869	25,864	13,840	16,352	-36.79%	-12%
Pirates Cove Marine Park	5,648	7,536	8,118	7,066	25.11%	8%
Plumper Cove Marine Park	4,170	5,568	6,669	5,261	26.16%	9%
Porteau Cove Park	61	22	48	371	508.20%	169%
Princess Louisa Marine Park	7,229	8,707	11,203	12,278	69.84%	23%
Rebecca Spit Park	2,125	3,712	5,091	3,978	87.20%	29%
Sandy Island Marine Park	2,093	1,014	-	-	-100.00%	-33%
Squitty Bay Park	918	1,325	3,485	2,115	130.39%	43%
Wakes Cove Park	1,501	1,078	560	480	-68.02%	-23%
Wallace Island Marine Park	5,834	5,741	6,835	8,736	49.74%	17%
<b>Total</b>	<b>106,132</b>	<b>109,252</b>	<b>127,002</b>	<b>124,783</b>	<b>17.57%</b>	<b>6%</b>

Source: BC Parks

### Annual Customer Entries from the US to BC by Boat

The following table shows annual customs entries from the US to BC in total and then by private boat. BC has experienced a significant decline in US visitation over the last several years largely as a result of poor economic conditions, the devaluing of the US dollar relative to the Canadian dollar and increases in the price of gasoline. Custom entries from the US to BC by private boat have experienced a more severe decline than the overall decline in US visitors to BC. Day trips by private boat have experienced the highest rate of decline, with average annual decline of approximately 9% from 2007 to 2011. US residents entering BC by private boat declined at a lower rate, with average annual decline of just under 6%.

Annual Custom Entries from US to BC	2007	2008	2009	2010	2011	% Change	AAC %
United States residents entering Canada	5,061,984	4,475,512	4,294,858	4,373,377	4,168,532	-17.7%	-4.4%
United States residents entering Canada, boat, private	39,542	33,881	35,444	33,554	29,603	-25.1%	-6.3%
United States residents entering Canada, boat, private, same day	5,235	4,247	4,105	4,029	3,331	-36.4%	-9.1%
United States residents entering Canada, boat, private, one or more nights	34,307	29,634	31,339	29,525	26,272	-23.4%	-5.9%

Source: Statistics Canada

## Appendix B – Sector Overview (Detail)

### Product Attributes

The attributes that are most commonly associated with the power and sail cruising experience in BC are listed below.

Natural Attributes	Cultural Attributes
Scenery	Cultural heritage
Diversity of wildlife	Aboriginal culture and authentic product
Intact wildlife	Working harbours
Remoteness	Wineries
Many parks and protected areas	Unique festivals and events
Beaches and clean water	Rural areas
450 km of protected water	Coastal communities located on marine routes
20,000 km of coastline (much uninhabited)	West coast culture and cuisine
Abundance of islands	Environmentally friendly
Good climate (depending on season)	

Facilities and Services	Activities
Network of harbours and marinas	Diversity of activities
Range of marine services and amenities	High-quality diving
Services and facilities in parks	Swimming
Haul-out services	Mountain hikes
Onshore transportation	Golfing
Expert, hospitable wildlife guides (guided charters)	

### Critical Factors for this Sector

Critical factors for the sector are as follows.

Critical Factors for this Sector	
Fuel	Conservation of marine and terrestrial systems
Washroom and laundry facilities	Education about wilderness ethics
Water supply	Diversity of experiences (water and land)
Pump-out facilities	Network of marinas
Electricity	Appealing waterfront atmosphere
Safe docks	Community support
Security (given the expense of many boats)	Local government support
Marina services (e.g., mechanics)	Food and beverage within walking distance
Staff with good communication skills	Shopping within walking distance

Critical Factors for this Sector	
Suitable operating hours	Medical services
Reliable WIFI with sufficient capacity	Nearby parks and walking trails
Experienced, wilderness/wildlife guides	High-quality natural environment
World-class local charter boat crew	Clean, appealing setting/environment
Protection of Wildlife	

### Key Markets and Market Characteristics

Current key geographic markets are as follows.

Existing Geographic Markets	
Primary Markets	Secondary Markets (smaller volumes)
British Columbia	Alaska
Washington	Ontario
Alberta	European - West (UK, Germany, France)
California	European - East
Oregon	

With regard to the European markets, stakeholders noted that these visitors:

- Are typically attracted by an experience that they cannot get in Europe; and,
- Rely on chartered vessels.

Emerging markets for the power and sail cruise sector are noted below.

Emerging/Future Markets and Market Trends
Ontario and Alberta: <ul style="list-style-type: none"> <li>• Interest in boating is increasing</li> <li>• Relatively stable economies</li> <li>• Option of travelling south is less appealing</li> <li>• Travelling in the Caribbean is more challenging</li> <li>• BC is considered a safe destination</li> </ul>
Eastern US seaboard <ul style="list-style-type: none"> <li>• Boaters are looking for new destinations</li> </ul>
BC Residents <ul style="list-style-type: none"> <li>• Charter opportunities for BC residents who do not own boats</li> </ul>
Asia (longer-term) <ul style="list-style-type: none"> <li>• Particularly Asia</li> </ul>
“Baby Boomer” market <ul style="list-style-type: none"> <li>• Increasing leisure time and disposable income of this segment presents opportunities</li> </ul>
Demand at boat shows/boat sales are increasing

### Emerging/Future Markets and Market Trends

- Anecdotal observation by workshop participants

When asked about the typical characteristics of existing markets for BC's power and sail cruising sector, stakeholders provided the following observations.

Market Characteristics	
Higher male representation (unguided boating)	Inter-generational travelling parties
Higher female representation (guided charters)	Boys' weekend get-aways
Many couples	Women's "cruise & learn" charters
Some families	Yacht clubs
Many retirees	Solo travelers (guided charters)

Stakeholders also indicated that boating magazines and articles are **focusing more on the broader experience of destinations**, rather than only the marine and boating environment. This is important with regard to any future planning related to destination development, packaging and marketing for BC's power and sail cruising sector.

Stakeholders also made the following observations regarding boat size:

- The typical boat size for this sector is approximately 50 feet or under (however, larger boats are also used). The guided charter sector typically uses larger boats (approximately 70 feet).
- Boats under 35 feet are often used by families.

### Competition and Competitive Features

When discussing competitive destinations, stakeholders indicated that:

- Puget Sound and the San Juan Islands area present the most direct competition because of the similarities between these areas and parts of the BC coast, particularly the southern coast.
- For the guided charter sector, the fjords, bears, remote and wild archipelagos and strong coastal First Nations culture of the north coast are competitive features, that are not prevalent in the Puget Sound and the San Juan Islands area.
- Washington State does a good job of marketing and, as noted above, features some attributes that are similar to BC's.
- BC's coastal and marine parks and protected areas, together with remote areas of the BC coast, are competitive features for BC particularly for those markets seeking a remote, natural experience.
- Alaska is the main destination for some travelers who are boating along the BC coast.

When asked about destinations that demonstrate best practices with regard to destination planning, management and marketing, stakeholders indicated that:

- Washington State's power and sail cruise sector benefits from:



- State-run, government harbours;
- Tax revenues that the government uses to fund infrastructure improvements;
- Great infrastructure and facilities (related to the above-noted point);
- Docks that are accessible to the public; and,
- Larger marinas than those that exist in BC:
  - Many marinas in Washington State can accommodate 800 to 1000 boats.
  - Marinas in BC typically accommodate 200 – 300 boats.

### Organization of the Sector

There are many stakeholders, organizations and government agencies that are associated with BC's power and sail cruising sector. The following information was provided by stakeholders throughout the process.

Stakeholders, Organizations, Government Agency	Relationship/Role
Public and private marinas	<ul style="list-style-type: none"> <li>• Provide infrastructure and services</li> </ul>
Charter companies	<ul style="list-style-type: none"> <li>• Charter boat companies in BC</li> <li>• "Bareboat" (non-crewed) and guided (crewed)</li> </ul>
BC Parks and Parks Canada	<ul style="list-style-type: none"> <li>• Government agencies (provincial and federal)</li> <li>• Provides and maintains parks/protected areas including:               <ul style="list-style-type: none"> <li>• Park services</li> <li>• Park facilities</li> </ul> </li> </ul>
Environment Canada	<ul style="list-style-type: none"> <li>• Government agency (federal)</li> <li>• Works to protect the environment, conserve the country's natural heritage and provides weather and environmental predictions to keep Canadians informed and safe</li> </ul>
Department of Fisheries and Oceans (DFO) – Small Craft Harbours	<ul style="list-style-type: none"> <li>• Government agency (federal)</li> <li>• Promotes the formation of harbour authorities to ensure local control over commercial fishing harbours</li> <li>• Transfers the ownership of non-essential harbours and recreational harbours to local communities through divestiture</li> </ul>
Canadian Coastguard	<ul style="list-style-type: none"> <li>• Special Operating Agency of DFO</li> <li>• Delivers programs and services that support sustainable use and development of Canada's waterways and aquatic resources</li> <li>• Owns and operates the federal government's civilian fleet</li> <li>• Provides maritime services to Canadians</li> <li>• Helps DFO meet its responsibility to ensure safe and accessible waterways for Canadians</li> </ul>
Transport Canada – Office of	<ul style="list-style-type: none"> <li>• Government agency (federal)</li> </ul>

Stakeholders, Organizations, Government Agency	Relationship/Role
Boating Safety	<ul style="list-style-type: none"> <li>Delivers prevention-based programs and vital information for users and builders of recreational boats</li> </ul>
Ministry of Jobs, Tourism and Skills Training/Tourism BC	<ul style="list-style-type: none"> <li>Government agency (provincial)</li> <li>Helps foster competitive tourism product, while enhancing the province's reputation as a world class destination and a magnet for international and domestic travellers through well-conceived, strategic marketing initiatives</li> <li>Offers a range of industry/sector and community development and marketing programs, including the Experiences BC program</li> </ul>
Municipal and regional governments	<ul style="list-style-type: none"> <li>Governments (municipal and regional)</li> <li>Provide local and regional government services to their respective jurisdictions</li> </ul>
Regional Destination Marketing Organizations (RDMOs)	<ul style="list-style-type: none"> <li>Not-for-profit organizations/societies</li> <li>Agents of the Ministry of Jobs, Tourism and Skills Training and Tourism BC</li> <li>There are six RDMOs, one in each of BC's six tourism regions</li> <li>The Ministry of Jobs, Tourism and Skills Training has an ongoing partnership with each of the six RDMOs to deliver regional marketing programs</li> </ul>
Community Destination Marketing Organizations (DMOs)	<ul style="list-style-type: none"> <li>Not-for-profit societies/organizations typically funded through the Additional Hotel Room Tax (other forms of funding may also be provided)</li> <li>Currently, there are over 40 DMOs in BC</li> <li>Conducts community tourism development and marketing activities</li> </ul>
Chambers of Commerce	<ul style="list-style-type: none"> <li>Usually not-for-profit societies</li> <li>Typically membership-based</li> <li>Help develop and connect the business interests of a community</li> </ul>
Canadian Power and Sail Squadron	<ul style="list-style-type: none"> <li>Provides training related to safety</li> </ul>
Harbour Authority Association of BC	<ul style="list-style-type: none"> <li>Incorporated, not-for-profit association</li> <li>Membership organization</li> <li>Mandate is "To establish effective communication between Harbour Authorities, foster a good working relationship, exchange information and network, establish a professional standardized policy manual, and educate users, staff and directors".<sup>15</sup></li> </ul>
Port Authorities	<ul style="list-style-type: none"> <li>Port authorities in BC and Canada are non-shareholder, financially self-sufficient corporations, established by the Government of Canada in January 2008, pursuant to the Canada Marine Act. They are accountable to the federal Minister of Transport, Infrastructure and Communities.</li> <li>Port authorities are governed by a board of directors representing government and industry.</li> <li>Port authorities make independent decisions on business plans and capital</li> </ul>

<sup>15</sup> [www.haa.bc.ca/information-aobut-haabc.com](http://www.haa.bc.ca/information-aobut-haabc.com) (accessed November 5, 2010)

Stakeholders, Organizations, Government Agency Relationship/Role	
	spending and the operational needs of port users. They are guided by a vision for long-term growth and competitiveness.
Harbour Authorities	<ul style="list-style-type: none"> <li>• Most harbour authorities are incorporated, not-for-profit organizations</li> <li>• Role is to manage, operate and maintain one or more public harbours through a lease agreement with Small Craft Harbours</li> </ul>
BC Yacht Brokers' Association	<ul style="list-style-type: none"> <li>• Incorporated, not-for-profit association</li> <li>• Promotes boating throughout BC by ensuring a high professional standard for yacht brokers<sup>16</sup></li> </ul>
BC Marine Trades Association	<ul style="list-style-type: none"> <li>• Incorporated, not-for-profit association</li> <li>• Serves as the voice of recreation boating in BC, working with all levels of government and other stakeholders to grow and enhance the boating experience.</li> </ul>
Northwest Marine Trades' Association	<ul style="list-style-type: none"> <li>• Incorporated, not-for-profit association</li> <li>• Serves to increase participation in recreational boating, provide leadership in regulatory and legislative issues important to its members and deliver services that help its members succeed<sup>17</sup></li> </ul>
Pacific Coast Congress of Harbour Masters and Port Managers	<ul style="list-style-type: none"> <li>• An organization of commercial and recreational marina professionals</li> <li>• Promotes the development and growth of the industry and membership through communication, education and professional certification<sup>18</sup></li> </ul>
Council of BC Yacht Clubs	<ul style="list-style-type: none"> <li>• The Council of BC Yacht Clubs represents the interests of members from more than 50 British Columbia yacht clubs. The Council provides key input into the affairs influencing all BC boaters including Canadian Coast Guard activities, debris control, environmental concerns, water use license applications and parks research. When required, the Council can lobby regulators for changes that benefit the boating public. The council was instrumental in forming the BC Marine Parks Forever Society.<sup>19</sup></li> </ul>

At this time, there is little coordination between stakeholders and organizations with regard to destination development, product packaging and marketing. Stakeholder indicated that more communication is needed:

- Between harbours; and,
- Between harbours and other stakeholders and organizations.

As stated by one stakeholder, there is a need for “more cross-talk between organizations regarding how to help and complement one another”.

<sup>16</sup> [www.bcmata.com/bcyba/01/index.html](http://www.bcmata.com/bcyba/01/index.html) (accessed November 5, 2010)

<sup>17</sup> [www.nmta.net/whyjoin.asp](http://www.nmta.net/whyjoin.asp) (accessed November 5, 2010)

<sup>18</sup> [www.pccharbormasters.org/](http://www.pccharbormasters.org/) (accessed November 5, 2010)

<sup>19</sup> Source: Council of BC Yacht Clubs website, accessed November 5, 2010.

### Coastal Marine Parks and Conservancies

A key competitive strength for BC's power and sail cruise sector is the network of coastal marine parks and protected areas. In addition to Gulf Islands National Park Reserve, Gwaii Haanas National Park Reserve and Pacific Rim National Park Reserve, there are many coastal marine parks and conservancies under the jurisdiction of BC Parks. The two tables below list:

- BC Parks coastal marine parks; and,
- BC Parks conservancies that have marine foreshore.

BC Parks – Coastal Marine Parks	
<b>DESOLATION SOUND</b> Broughton Archipelago Marine Park Copeland Islands Marine Park Cormorant Channel Marine Park Desolation Sound Marine Park Echo Bay Marine Park Ha'thayim (Von Donop) Marine Park Mansons Landing Park Mitlenatch Island Nature Park Octopus Islands Marine Park Read Island/Rendezvous Island South Park Rebecca Spit Marine Park Rock Bay Marine Park Roscoe Bay Park Small Inlet Marine Park Surge Narrows Park Teakerne Arm Park Thurston Bay Marine Park Walsh Cove Park	<b>WEST COAST</b> Big Bunsby Island Marine Bligh Island Marine Brooks Peninsula Cape Scott / Raft Cove Catala Island Marine Dawley Passage Dixie Cove Marine Epper Passage Flores Island Gibson Marine God's Pocket Marine Hesquiat Peninsula Lawn Point Maquinna Marine Nuchatlitz Quatsino Rugged Point Marine Santa Gertrudis - Boca del Infierno Sulphur Passage Sydney Inlet Tahsish-Kwois
<b>NORTH COAST</b> Codville Lagoon Marine Fiordland Recreation Area Green Inlet Marine Hakai Luxvabalis Protected Area Jackson Narrows Marine Kitlope Heritage Conservancy Protected Area Kitson Island Marine Klewnuggit Inlet Marine Lowe Inlet Marine Oliver Cove Marine Penrose Island Marine Sir Alexander Mackenzie Union Passage Marine	<b>LOWER MAINLAND/HOWE SOUND</b> Buccaneer Bay Garden Bay Marine Halkett Bay Harmony Islands Marine Indian Arm Jedediah Island Marine Hardy Island Marine Plumper Cove Marine Porteau Cove Princess Louisa Inlet Marine Sargeant Bay Sechelt Inlets Marine Simson Smuggler Cove Marine South Texada Island Squitty Bay
<b>GULF ISLANDS</b> Dionisio Point	

BC Parks – Coastal Marine Parks	
Discovery Island Marine Montague Harbour Marine Newcastle Island Marine Pirates Cove Marine Sandy Island Marine Tribune Bay Wallace Island Marine Whaleboat Island Marine	

BC Parks - Conservancies that have Marine Foreshore	
<b>Northern</b> Alty Conservancy Banks Nii Luutiksm Conservancy Bishop Bay-Monkey Beach Conservancy Bishop Bay-Monkey Beach Corridor Conservancy Ecstall-Spoksuit Conservancy Gitxaa'a Nii ?uutiksm/Kitkatla Conservancy Huchsduwachsd Nuyem Jeess/Kitlope Heritage Conservancy K'distsausk/Turtle Point Conservancy Kennedy Island Conservancy Khutzeymateen Inlet Conservancy Khutzeymateen Inlet West Conservancy K'Nabiyaaxl/Ashdown Conservancy Ksgaxl/Stephens Island Conservancy Ksi X'anmaas Conservancy Ksi Xts'at'kw/Stagoo Conservancy Ktisgaidz/Macdonald Bay Conservancy Kts'Mkta'ani/Union Lake Conservancy K'waal Conservancy Larcom Lagoon Conservancy Lax Ka'gaas/Campania Conservancy Lax Kul Nii Luutiksm/Bonilla Conservancy Lax Kwaxl/Dundas and Melville Islands Conservancy Lax Kwil Dziidz/Fin Conservancy Lucy Islands Conservancy Manzanita Cove Conservancy Maxtaktsm'aa/Union Passage Conservancy Monckton Nii Luutiksm Conservancy Shearwater Hot Springs Conservancy Simpson Lake East Conservancy Skeena Bank Conservancy Stair Creek Conservancy Thulme Falls Conservancy Wales Harbour Conservancy Winter Inlet Conservancy Zumtela Bay Conservancy	<b>Thompson Cariboo</b> Bella Coola Estuary Conservancy Carter Bay Conservancy Clyak Estuary Conservancy Fiordland Conservancy Goat Cove Conservancy Hakai Luxvbalis Conservancy Kilbella Estuary Conservancy Kimsquit Estuary Conservancy Kwatna Estuary Conservancy  <b>West Coast</b> Daawuuxusda Conservancy Damaxyaa Conservancy Duu Guusd Conservancy Dzawadi/Klinaklini Estuary Conservancy Kamdis Conservancy Kunxalas Conservancy K'uuna Gwaay Conservancy Nang Xaldangaas Conservancy Negiy/Nekite Estuary Conservancy Pal?min/Estero Basin Conservancy Phillips Estuary/?Nacinuxw Conservancy Tlall Conservancy Wakeman Estuary Conservancy Wawley/Seymour Estuary Conservancy Xwakwe?naxde?ma/Stafford Estuary Conservancy Yaaguun Gandlaay Conservancy

## Appendix C – Strengths, Weaknesses, Opportunities and Threats for the Sector

### Destination Management and Infrastructure

#### Strengths

- Regional Destination Marketing Organizations (RDMOs) and ongoing cooperative marketing initiatives
- Sector partners that have common interests and are available to work together
- Very good base of destination assets to support power and sail cruising
- Good awareness about BC's broader tourism industry and product offerings in some markets
- Super, Natural British Columbia® brand is a very good fit for BC's power and sail cruising destination and products (also noted under Marketing)

#### Weaknesses

- Government economic stimulus funding is now winding down
- Ability to expand infrastructure is very constrained
  - Not enough data/research regarding seasonal capacity and utilization at the provincial level to inform strategic infrastructure investment
  - Lack of space for building more infrastructure
    - Cost of compensating displaced users in order to build new infrastructure is very high
    - Cost of hiring environmental consultants and other experts is high
- Federal regulations are such that harbours cannot turn away commercial fishing vessels, which makes it difficult to market to and plan for power and sail cruising vessels
- Facilities are limited in their ability to accommodate super yachts (over 85' in length)
- Qualifying to enter Canada with American crew from the US is challenging and complex

#### Opportunities

- Continue to manage the destination to ensure that it supports the Super, Natural British Columbia® brand
- Some excess capacity during tourist season, primarily in southern harbours
- However, northern Vancouver Island has little capacity for transients in summer
  - Northern Vancouver Island trying to increase capacity; some funding is available, however, more is needed
  - It is difficult to know about missed opportunities, particularly since people on the water talk and tell others that there is "no room to moor in Port McNeill"
- There are several vacant water lots sitting idle
  - Presents an opportunity to develop more infrastructure
- There is an opportunity to create new infrastructure in "green manner", which would contribute to BC's reputation as a well-managed, sustainable power and sail cruising (and, more broadly, tourism) destination

#### Threats

- Maintenance of park assets by government parks agencies (BC Parks and Parks Canada) is very expensive, but needs to occur
  - If funding cuts occur, this may compromise the quality of access, wildlife safety, facilities and services provided at parks, which are a competitive asset for BC from a power and sail cruising destination perspective

## Markets/Marketing

### Strengths

- Large and established market base
- BC has the power and sail cruising product to create the “story”, including:
  - Marine network/
    - Well thought-out, established and very marketable
  - Inventory of established harbors
  - Natural and cultural assets (see previous section of report)
- BC has trained marketing professionals to support marketing efforts
- Super, Natural British Columbia® brand is a very good fit for BC’s power and sail cruising destination and products (also noted under Destination Management and Infrastructure)

### Weaknesses

- Future marketing funding levels are uncertain

### Opportunities

- The stakeholders in this process present an opportunity with regard to future coordinated marketing efforts
- Opportunity to market the working harbor experience
- Opportunity to package, market and profile the diverse power and sail cruising experiences, including the ancillary products/experiences (First Nations product, culinary experiences, wineries, golf, and many others)
- Sustainable dining opportunities (seafood)
- Working harbor experience
- Potential joint marketing opportunities with BC Parks (e.g., the mapping initiative)
- Opportunities to utilize Tourism BC’s Tourism Business Essentials programs, resources and workshops, such as: media relations, product packaging, social media workshops
- Opportunities related to the growing prominence of social media
  - Many harbors have wireless capability
  - With the growing importance and use of instant messaging, it is critical that the sector provides good service, products, and experiences, as word-of-mouth marketing is becoming even more prominent and influential given the dynamic social media environment
- Opportunities at boat/marina shows (however, these shows are focused more on selling boats)
- Opportunity to conduct research about levels of awareness in markets and about what different demographic segments are seeking
- Growing interest in “staycations” presents opportunities related to the local and regional markets
- Opportunity to pool resources and conduct collaborative marketing

### Threats

- High value of the Canadian dollar and low value of the US dollar may impact the US market’s decision with regard to travel to BC (and Canada)
- High cost of fuel may impact the market’s decision regarding whether to cruise and/or how much to cruise
- Global economic conditions may impact where visitors travel to, how much they travel, if they travel, and/or how much they spend when they travel

#### Additional Advice Regarding Marketing (from stakeholders)

- Ensure the capacity exists to deliver before you market (berths, infrastructure, human resources/service, etc.)
- Market for times when you have berth capacity (strategic marketing)

### Human Resources

#### Strengths

- Harbour Authority system has strong and skilled foundation of management
- Port McNeill now shares space with the visitor centre
  - Positive experience
  - New building
  - Mutually beneficial relationship
- Comox – chamber of commerce fills brochure racks at the harbour
- Harbour Authority Association of BC and the Pacific Coast Congress of Harbour Masters and Port Managers
  - Offer joint training with the University of Alaska, which includes online harbour/marina training
- Harbours receive funding from DFO for harbour-related training

#### Weaknesses

- Seasonality impacts the ability to attract and retain good staff
- The ability to hire is constrained by limited budgets
- The ability to hire is often dependent on student grants
- At times, harbours do not staff up during extended hours due to the cost of overtime wages
- Returning employees may forget previous year's training
- There is uncertainty regarding demand which makes it challenging to forecast accurate staffing needs
- The challenge with regard to forecasting utilization could be partially addressed through a reservation system
  - Typically, boaters are required to pay a premium for reservations
  - There may be an opportunity to introduce this kind of change

#### Opportunities

- Opportunity for other marinas/harbours to coordinate/collaborate with visitor centres (see Port McNeill experience, under “strengths”)
- Opportunity to improve service levels through World Host training (through Tourism BC)
  - Develop customized training workshop for this sector
  - Possibly incorporate into Harbour Authority Association of BC's conference program or zone meetings program
  - Note that a minimum number of nine people is required to host these workshops

#### Threats

- Current and future labour shortages (note that this is a threat for the tourism industry as a whole)



## Sector Coordination and Leadership

### Strengths

- The sector has a range of affiliated organizations, which collectively present a potential strength:
  - Harbour Authority Association of BC
  - BC Parks
  - Destination Marketing Organizations
  - Regional Destination Marketing Organizations
  - BC Marine Trades Association
  - Yacht BC
  - Waggoner Cruising Guide
  - Georgia St. Alliance (Non- profit organization focused on environmental protection)

### Weaknesses

- Challenges with regard to connecting with and engaging private marinas
- No association of marine tourism associations

### Opportunities

- Potential partnerships/stakeholders:
  - 10 First Nations (Nanwakolas Council in Campbell River)<sup>20</sup>
  - Most community Destination Marketing Organizations would likely be interested in supporting this initiative
- Opportunity for a sector champion to help lead this initiative

<sup>20</sup>

Coral Duncan, Administrative Assistant  
<http://nanwakolas.com/coralduncan@nanwakolas.com>  
 Art Wilson, Referrals Office Project Manager  
<http://nanwakolas.com/artwilson@nanwakolas.com>