APPENDIX "A"

SCHEDULE OF AGENDAS
PREMIER'S TOURISM INDUSTRY ADVISORYCOMMITTEE

Agenda
Meeting #1
Premier's Tourism Industry Advisory Committee
8:00 a.m. – 3:00 p.m. Tuesday, October 25th
Ministry of Tourism Boardroom
Vancouver, BC

Board Members: Darcy Alexander, Chair, VP & GM of Sun Peaks Resort Corporation
James Terry, COO, Rocky Mountain Vacations
Dave Brownlie, Executive Vice President, Intrawest
Phil Barnes, Regional Vice President, Fairmont Hotels & Resorts
Virginia Greene, BC Deputy Minister of Tourism
Allen Tozer, Businessman, Board Member of TBC

Facilitator: Blair Baldwin, Pinnacle Consulting

1. Introductions – Introduce Committee

2. Review Mandate

3. Outline main External Environment issues (Competition, Marketplace, Government, Consumers)

4. Prioritize these issues

5. Outline main Internal Environment issues (State of Tourism industry)

6. Prioritize these issues

7. Identify Strategic issues and prioritize

8. Tax issue

Meeting #1
Premier's Tourism Industry Advisory Committee
8:00 a.m. – 3:00 p.m. Tuesday, October 25th
Ministry of Tourism Boardroom
Vancouver, BC

Industry Analysis

1. How does the tourism industry compare? How is it faring? What indicators best describe this?
2 What are the external forces shaping the industry on a global, national and local level?
3. What is the relative market share of BC's tourism industry on a world scale?
4. What is the scale and nature of exports?
5. What is the forecast growth of the industry?
6. Who are the main competitors and what are the forces shaping competition?
7. How would you segment the competitors in the industry?
8. What are the market sectors or segments in the industry in which BC's companies compete?
9. What is the relative profitability of BC's tourism industry?
10. What is the nature of the value chain or business system for the industry?
11. What are the strengths and weaknesses of BC's Tourism industry as we move forward?

<u>Agenda</u>

Meeting #2
Premier's Tourism Industry Advisory Committee
10:00 a.m. – 4:00 p.m. Monday, November 14th, 2005
Manteo Resort Waterfront Hotel and Villas
Waterfront I Room
3762 Lakeshore Road
Kelowna, BC

Board Members: Darcy Alexander, Chair, Vice President & General Manager of Sun Peaks Resort Corporation
James Terry, COO, Rocky Mountain Railtours
Dave Brownlie, Executive Vice President, Intrawest
Phil Barnes, Regional Vice President, Fairmont Hotels & Resorts
Virginia Greene, BC Deputy Minister of Tourism
Allen Tozer, Businessman, Board Member of TBC
Kevin Walker, President, Walker Hospitality Group
April Moi, Executive Director, Hello North

Facilitator: Blair Baldwin, Pinnacle Consulting

10:00 a.m. – 10:30 a.m.	Tourism BC Presentation Relating to Our Strategic Issues
10:30 a.m. – 11:30 a.m.	Issue Discussion & Strategies – Infrastructure
11:30 a.m. – 12:30 p.m.	Issue Discussion & Strategies – HR
12:30 p.m. – 1:30 p.m.	Issue Discussion & Strategies – Acquiring and Retaining Customers in PNW
1:30 p.m. – 2:30 p.m.	Issue Discussion & Strategies – Service Delivery
2:30 p.m. – 3:30 p.m.	Issue Discussion & Strategies – Evaluation of Our Positioning
3:30 p.m. – 4:00 p.m.	Summary and Next Steps

Agenda

Meeting #3
Premier's Tourism Industry Advisory Committee
10:00 a.m. – 4:00 p.m. Monday, December 5th
Delta Vancouver Suites Hotel
Somerveil Boardroom
550 West Hastings Street
Vancouver, BC

Board Members: Darcy Alexander, Chair, Vice President & General Manager of Sun Peaks Resort Corporation
James Terry, COO, Rocky Mountain Railtours
Dave Brownlie, Executive Vice President, Intrawest
Phil Barnes, Regional Vice President, Fairmont Hotels & Resorts
Virginia Greene, BC Deputy Minister of Tourism
Allen Tozer, Businessman, Board Member of TBC
Kevin Walker, President, Walker Hospitality Group
April Moi, Executive Director, Hello North
Blair Baldwin, President, Pinnacle Consulting – Committee Facilitator

1. 10:00 a.m. Review and discussion of Strategy numbers 1, 2, 3 and 5

2. 12:00 p.m. Working lunch

3. 1:30 p.m. Presentation from Bev Briscoe, Chair of the Industry Training Authority, on Human Resources challenges. Identify HR strategy number 4.

4. Next Steps

5. Adjournment

APPENDIX "B"

INDUSTRY & COMPETITIVE BACKGROUND

TOURISM COMPETITIVENESS ANALYSIS

ANSWERS TO TOURISM COMMITTEE QUESTIONS

Prepared for:

Ministry of Tourism, Sport and the Arts

and

Tourism British Columbia

Prepared by the:

Economic Planning Group

October 20, 2005

BACKGROUND AND OBJECTIVES

The British Columbia Government established the BC Competition Council in March 2005. This council is charged with the responsibility of recommending workable private sector and public sector actions to improve the province's competitiveness. Tourism is one of twelve sectors included in the Council's mandate.

A tourism committee is being established to review options and make recommendations to the Competition Council. The chair of this committee has posed a number of questions to government in order to establish an information base to assist with their analysis. The questions are as follows:

1. How does the tourism industry compare? How is it fairing? What indicators best describe the industry?
2. What are the external forces shaping the industry on a global, national and local level?
3. What is the relative market share of BC's tourism industry on a world scale?
4. What is the nature and scale of exports?
5. What is the forecast growth of the industry?
6. Who are the main competitors and what are the forces shaping competition?
7. How should the competitors be segmented?
8. What are the market sectors or segments in the industry in which BC companies compete?
9. What is the relative profitability of the BC tourism industry?
10. What is the nature of the value chain or business system for the industry?
11. What are the strengths and weaknesses of the BC tourism industry?

RESEARCH PROCESS

Answers to the above questions have been provided from existing research, (both published and unpublished) from government, EPG's research library, and selected websites. This version is a partially complete draft for discussion purposes.

1. How does the tourism industry compare? How is it faring? What indicators best describe this?

Tourism is a difficult industry to measure because it is not statistically reported as an industry sector (unlike forestry or mining). This situation occurs because the businesses that benefit from tourist spending include a number of different industry categories such as accommodation, transportation, attractions, restaurants, etc.

Tourism can be analyzed from a supply-side (the businesses that provide goods and services to travellers), or the demand-side (the number and characteristics of the visitors to an area). Statistics from both categories have been included herein.

Tourism is one of British Columbia's largest economic sectors. The industry caters to over 22 million travellers annually, represents over $9.5 billion in annual spending, employs about 115,000 British Columbians (accounting for 7.2 per cent of the workforce), and contributes about 5% of the province's GDP.[1]

During much of the 1990's, the industry experienced steady but modest growth. In 1990, $5.2 billion in tourism revenue was generated in British Columbia.[2] In 1995, tourism revenue rose to $6.7 billion.[3] By 2000, BC tourism revenue totalled $9.5 billion, contributed by 22.5 million overnight visitors to BC.[4]

[1] Tourism Sector – SWOT Analysis, Pg 1, Section 1.1 Background
[2] Tourism British Columbia - 1990 Highlights Report
[3] Tourism British Columbia – Tourism Highlights 1995
[4] Tourism British Columbia – The Value of Tourism Feb 2002

British Columbia Tourism Revenue and Visitor Volume 1998 - 2004

Year	Overnight Visitor Revenue to BC 1998 - 2004 (billions)	Overnight Visitor Volume to BC 1998 - 2004 (millions)
1998	$8.75	21.7
1999	$9.05	22.0
2000	$9.45	22.5
2001	$9.21	22.4
2002	$9.32	22.6
2003	$8.97	21.9
2004	$9.47	22.4

Source: Tourism British Columbia Annual Report 2004/2005

From late 2001 to 2003, the worldwide tourism industry slowed significantly as a result of 9/11, SARS, and the war in Iraq. With the more recent passage of time, both the world tourism industry and the BC industry have experienced positive results. This up-trend continues through 2005.

There is an extensive list of indicators that are used to measure the performance of the tourism industry. The list includes such categories as customs entries, accommodation room revenue, accommodation occupancy rate, passenger volume on roads and ferries, persons attending Visitor Information Centres, attractions attendance, convention delegates, and many more. The two indicators that best describe the overall performance of BC's tourism industry are the volume of visitors entering or travelling within BC, and the total expenditures while travelling in BC.

The following is the total overnight visitor volumes and values for British Columbia from 2001-2004.

Market Origin	**Total Overnight Visitor Revenue**				**% Change in Overnight Revenue from Previous Year**				**Total Overnight Visitor Volu**			
	2001	**2002**	**2003**	**2004**	**2001**	**2002**	**2003**	**2004**	**2001**	**2002**	**2003**	
BC	**2,452**	**2,501**	**2,526**	**2,602**	**-1.0%**	**2.0%**	**1.0%**	**3.0%**	**10,761**	**10,869**	**10,869**	**1**
Canada	**2,749**	**2,733**	**2,644**	**2,740**	**-3.0%**	**-0.6%**	**-3.2%**	**3.6%**	**4,832**	**4,789**	**4,645**	
United States	**2,360**	**2,474**	**2,314**	**2,392**	**-0.2%**	**4.8%**	**-6.8%**	**1.6%**	**5,103**	**5,297**	**4,905**	
Mexico	**49**	**48**	**53**	**57**	**10.2%**	**-3.0%**	**10.5%**	**7.3%**	**71**	**68**	**74**	
Asia Pacific	**919**	**944**	**772**	**959**	**-4.5%**	**2.7%**	**-18.2%**	**24.1%**	**852**	**872**	**702**	
Japan	264	289	195	264	-8.8%	9.3%	-32.4%	35.3%	273	296	198	
Australia	151	138	150	175	-2.0%	-8.6%	9.0%	16.3%	127	115	124	
New Zealand	29	26	26	32	-9.0%	-9.0%	0.9%	22.4%	24	22	22	
South Korea	95	103	101	117	-14.0%	8.4%	-2.2%	15.3%	98	105	101	
Taiwan	108	100	65	101	-28.7%	-7.7%	-34.5%	54.4%	85	78	50	
Hong Kong	90	90	70	78	-1.8%	0.0%	-22.5%	11.4%	82	81	62	
China	66	81	67	85	24.8%	22.3%	-16.6%	26.9%	59	72	59	
South East Asia	62	65	48	58	6.4%	5.9%	-26.6%	20.5%	56	58	42	
Other Asia Pacific	54	51	49	49	10.3%	-4.1%	-5.2%	-0.1%	48	46	43	
Europe	**638**	**570**	**578**	**653**	**-7.1%**	**-10.6%**	**1.3%**	**12.9%**	**619**	**551**	**551**	

UK	310	291	298	327	-4.8%	-6.2%	2.4%	9.7%	286	266	269	
Germany	139	109	111	126	-9.5%	-22.0%	2.7%	12.9%	114	88	90	
Austria	10	9	8	10	-15.7%	-11.1%	-5.3%	15.1%	8	7	7	
Switzerland	26	22	24	26	-19.1%	-13.3%	7.4%	7.4%	21	18	19	
France	22	19	18	23	-13.0%	-14.3%	-5.1%	24.5%	27	23	22	
Netherlands	33	28	31	34	-7.6%	-13.0%	9.8%	10.3%	39	34	37	
Italy	16	17	13	17	0.9%	6.4%	-23.8%	29.7%	20	21	16	
Nordic Europe	24	23	21	26	-13.5%	-2.9%	-9.4%	24.8%	30	29	26	
Other Europe	58	52	53	64	-1.9%	-10.4%	2.0%	21.9%	73	65	66	
Other Overseas	**74**	**65**	**66**	**71**	**-7.0%**	**-11.6%**	**0.6%**	**7.5%**	**143**	**126**	**125**	
Total Overseas	**1,631**	**1,580**	**1,416**	**1,682**	**-5.6%**	**-3.1%**	**-10.4%**	**18.8%**	**1,614**	**1,548**	**1,378**	
Total International	**4,041**	**4,102**	**3,783**	**4,130**	**-2.4%**	**1.5%**	**-8.0%**	**8.0%**	**6,788**	**6,913**	**6,357**	
Total Non Resident	**6,790**	**6,835**	**6,427**	**6,871**	**-2.6%**	**0.7%**	**-6.1%**	**6.2%**	**11,620**	**11,702**	**11,002**	**1**
Total	**9,242**	**9,336**	**8,953**	**9,473**	**-2.2%**	**1.0%**	**-4.2%**	**5.3%**	**22,381**	**22,571**	**21,870**	**2**

Source: BC Tourism Website

2**. What are the external forces shaping the industry on a global, national and local level?**

There are a number of issues that are affecting the movement of travellers to and within BC. Some of these are described below:

Regulatory Issues

US Border Security Issues: US law will require that American citizens have a passport in order to return to the US from international destinations (including Canada). This will require that all Americans visiting BC have a valid passport in order to get home. The proportion of Americans currently holding passports is reported to be under 25%.

Permits and Licenses: Fees for permits and licenses can be onerous for tourism operators, particularly for outdoor and adventure operators. Issues include the permitting timeframe and the fees.

US Marine Passenger Act: This act requires that US passengers transported between US ports must be in ships built in the US, owned by US citizens and manned by US crews. As virtually all of the Alaska cruise ships are foreign owned, stops are made in BC ports. These stops are a technical requirement of this 1920 act and are not market driven.

Currency Exchange Rates: There appears to be a correlation between US/Canadian currency exchange rates, and travel between the two countries. An improving Canadian dollar against the US dollar can be expected to adversely affect demand for Canadian tourism products.

Worldwide Issues

Terrorist Threats: Political unrest and terrorist acts throughout the world have dramatically affected tourism. These acts typically cause people to either cancel their travel plans or travel closer to home.

Pandemic Disease Outbreak: The threat of a worldwide influenza pandemic is influencing travel decisions and tourism agency planning. The onset of a pandemic would dramatically impact tourism throughout the world by causing people to travel less and to stay closer to home.

Capacity Issues

Labour Shortages: Tourism is a labour intensive economic sector and the industry depends on professional and well-trained workers. Due to an aging population, lower birth rates and competing economic sectors, there is a looming labour shortage. This shortage is expected to exist throughout the ten year planning horizon of this process.

Native Land Claims: This issue remains key to future tourism development outside of urban areas. At least two ski areas are caught in an impasse due to unresolved land claims. Numerous other crown land developments or expansions are on hold or have been abandoned. Resolving this issue would create certainty about tourism land tenure and access.

Land Tenure: Outdoor and adventure tourism products require access to the provincial land and water base in order to operate their businesses. The application and approval process can be time-consuming and costly.

Product Issues

Ski Resort Development: There are several high profile large-scale resort developments in various stages of planning or approvals. Advancing these projects would dramatically increase the available mountain resort capacity.

Attraction Development: The province has a number of unique and high quality tourism attractions. However, it does not have a major attraction capable of drawing visitors to the province. The Pacific Northwest is one of the few population centres in North America without a major theme park style facility.

Transportation Issues

Airline Regulations: Limited capacity and higher prices are the result of regulations restricting which airlines can operate into and throughout Canada. Allowing additional access to BC airports would provide increased volume. Allowing non-domestic airlines to operate between Canadian points would also provide additional capacity.

Highway Capacity: Efficient highway capacity into and out of BC communities is crucial to a healthy and growing tourism industry. The highway network in the lower mainland is becoming steadily more congested. This congestion causes border delays and affects the efficient movement of travellers to and within the Vancouver area. Interior highways are also of concern, particularly in the Okanagan and along the Trans Canada Highway.

Marine Capacity: BC Ferries is one of the largest ferry fleets in the world, however, its vessels and terminals are aging and require reinvestment. The new BC Ferries Corporation is addressing these issues, which will see new vessels built and brought into service over the next several years. Periodic maintenance issues and sailing disruptions are expected to increase until the vessel replacement plan is fully implemented.

3. What is the relative market share of BC's tourism industry on a world scale?

International tourism to BC grew by nearly 44% over the 8-year period from 1994 to 2002, averaging 4.7% annually. BC's share of all international arrivals represents just under 1% of the worldwide total. This proportion has remained in a fairly narrow range of between 0.97% and 1.01% over this period. However, BC's market share in the past few years has been trending down as tourism to other destinations has grown more rapidly. BC reached a high in 1998 and 1999, with 1.01% market share, but declined to 0.97% as of 2002.

The following table shows BC's market share trends compared to total international arrivals for 1995-2002.

BC's Share of International Tourist Arrivals

	1995	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**	**2002**
BC International arrivals (millions)	5.4	5.7	6.0	6.4	6.6	6.8	6.8	6.9
World International arrivals (millions)	551.7	585.8	609.9	628.2	651.6	696.1	692.9	714.6
BC Share (%)	0.98%	0.97%	0.98%	1.01%	1.01%	0.98%	0.98%	0.97%

Sources: Tourism British Columbia and World Tourism Organization

Research reports consistently indicate that British Columbia has a variety of quality resources and experiences that potential visitors are seeking. The fit between the many popular vacation experiences and BC's tourism offerings is high. BC has been able to penetrate a few select markets but many markets remain under-serviced.

It is noted that the BC international arrivals are Canada Customs figures that record the inbound point of entry, not necessarily the province of destination. The figures could over estimate Asian entries and underestimate European entries.

4. What is the scale and nature of exports?

Tourism is an export industry caused by the purchase of goods and services by non-BC residents.

Despite the fact that tourism growth dropped in 2001, due to the 9/11 attacks, tourism remained as the third largest earner of export income for the province after Wood Products and Energy. Tourism earned more export income than Machinery and Equipment, Agriculture and Food, Metallic Minerals, and Fish Products.[5]

BC Exports: 2000 and 2001

Export	Amount Exported in 2000 (billions)	Amount Exported in 2001 (billions)
Wood Products	$16.3	$14.6
Energy	$5.3	$5.7
Tourism	**$4.1**	**$4.0**
Machinery and Equipment	$3.7	$3.4
Other	$3.4	$3.3
Agriculture and Food	$1.7	$1.4
Metallic Minerals	$1.2	$1.3
Fish Products	$0.9	$1.0

Source: Tourism BC and BC Stats

Figures back to 1996 show that Tourism's role as an exporter climbed steadily up to 2000, with a modest decline in 2001.

Tourism Exports 1996 - 2000

	1996	1997	1998	1999	2000	2001
BC Tourism Export Total (billions)	$3.4	$3.6	$3.7	$4.0	$4.1	$4.0

Source: Tourism BC and BC Stats[6]

[5] http://www.tourismbc.com/PDF/Value2003%20Book_FINAL.pdf - Value of Tourism 2003
[6] http://www.tourismbc.com/research/value_of_tourism/vot2002.pdf

5. What is the forecast growth of the industry?

The goal of BC's tourism industry is to achieve $17.1 billion in visitor revenue by 2015, representing an average annual growth rate of 5.5%. These forecasts are based on a $10 billion dollar industry as of 2005. This assumption is subject to change as forecasts and results from 2003 and 2004 change.

These aggressive growth rates are above the worldwide tourism growth rates, resulting in an increase in worldwide market share.[7]

BC's Visitor Revenue Growth Objectives: 2005 – 2015

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
BC's Visitor Revenue Growth Objectives 2005 – 2015	3.7%	4.6%	5.0%	6.2%	7.5%	6.3%	6.1%	5.5%	5.3%	5.2%

Source: Tourism British Columbia: Tourism 2010 – The Ten-Year Plan

6. Who are the main competitors and what are the forces shaping them?

British Columbia competes for customers on a number of different fronts. One category is geographic and deals with the proximity to BC by other jurisdictions. BC's closest competitors geographically are Alberta and Washington State.

BC also competes with several other jurisdictions in specific tourism activities and products. Tallied below is a listing of competitive destinations by product.

It may also be informative to assess the performance of other countries/jurisdictions that have a similar population to British Columbia. The "competitors" selected are Norway, Ireland, New Zealand and Queensland, Australia.

[7] Tourism 2010 – The Ten Year Plan

Geographical

Alberta's close geographical proximity and Canadian content make it an automatic competitor in the tourism industry. In 2003, Alberta generated 4.3 billion dollars in tourism revenue[8], compared to British Columbia, which generated just under $9 billion in tourism revenue in 2003[9]. Out of Alberta's $4.3 billion, 48% of the revenues were generated by Albertans, 23% from the rest of Canada, and 29% from international visitors.[10]

As with Alberta, Washington State's proximity makes it a direct competitor to British Columbia. In 2004, Washington State generated $13.6 billion (Canadian dollars) in tourism revenues, which represented a 7.4% increase over 2003.[11]

Geographical Competition

Competition	Total Tourism Revenue (billions)	Percent of Visitor Breakdown
Alberta (2003)	$4.3	48% - Albertans 23% - Rest of Canada 29%- International
Washington State (2004)	$11.6 (US) $13.6 (Cdn)	43% - Washingtons 47% - Rest of US 10% - International
British Columbia (2004)	**$9.4**	**27% - BC** **29% - Canada** **44% - International**

Sources: Alberta-Canada.com
Washington State Department Trade, Community, and Economic Development
BC Stats

Geographic Competition: Past Performance

	Alberta		Washington		BC	
Year	**Tourism Revenue (billions)**	**# of Visitors (millions)**	**Tourism Revenue (billions)***	**# of Visitors (millions)**	**Tourism Revenue (billions)**	**# of Visitors (millions)**
1996	$3.5	19.4	$9.8	NA	**NA**	**NA**
1997	$3.7	20.0	$10.3	NA	**NA**	**NA**
1998	$4.2	23.1	$10.7	NA	**$8.75**	**21.7**
1999	$4.5	23.4	$9.6	NA	**$9.05**	**22.0**
2000	$4.8	22.5	$11.3	NA	**$9.25**	**22.5**
2001	$5.4	23.6	$12.3	NA	**$9.21**	**22.4**
2002	$5.4	21.7	$12.2	NA	**$9.32**	**22.6**
2003	$4.3	17.9	$12.7	NA	**$8.87**	**21.9**
2004	NA	NA	$13.6	NA	**$9.45**	**22.4**

Note: * American currency converted to Canadian dollars using - http://www.xe.com/ucc/
Sources: TravelAlberta
State of Washington Dept of Community, Trade and Economic Development and
Tourism BC

[8] http://www.alberta-canada.com/statpub/tourismStatistics/index.cfm
[9] Tourism BC Stats
[10] http://www.alberta-canada.com/statpub/tourismStatistics/index.cfm
[11] http://www.experiencewashington.com/images/pdf/R_ImpactStatewide2004p.pdf

Competition – Based on Tourism Activities or Products

Category	Product	Domestic Competition	Internation Competitio
Winter Products	▪ Alpine Skiing and Snowboarding ▪ Heliskiing and Snowcat skiing ▪ Other Winter Activities	Alberta Alberta Western and Northern Can.	Colorado, Europe Colorado, Chile NE, PNW States, Europe
Sports Fishing Products	▪ Fishing (Freshwater) ▪ Fishing (Saltwater)	Northern Canada None	Australia, New Zealand Washington, Alaska
Outdoor Products	▪ Outdoor Land based activities ▪ Outdoor Water based activities ▪ Parks	Western Canada Western Canada Western Canada	Selected states, Australia, A Selected states, Australia, N Australia, New Zealand
Touring Products	▪ BC Ferries Inside Passage Cruises ▪ Rail Travel ▪ Alaska Cruise ▪ Automobile/Recreation Vehicle Touring	None None California Western Canada	Europe, Amtrak, Europe Mexico, Caribbean, Medite Selected states
Urban Products	▪ Built attractions ▪ Events	Calgary, Toronto, Montreal Calgary, Toronto, Montreal	Selected US cities, Europe Selected US cities, Europe
Emerging Products	▪ Golf ▪ Wine Tourism ▪ Spa and Health resorts ▪ Aboriginal Tourism ▪ Agritourism	Alberta, PEI Ontario Alberta, Ontario, Quebec Alberta Alberta	Selected states, Scotland California, France, Italy Selected states, Europe Southwest states, Australia Australia, New Zealand
Business Products	▪ Convention/Trade shows ▪ General Business Travellers	Alberta, Ontario Alberta, Ontario	Selected states NA

International Competition – Based on Population

A tactic to compare competitors on the international stage is to assess countries or jurisdictions that have a similar population to British Columbia. The selected countries are Norway, Ireland, New Zealand and Queensland, Australia.

Norway has a population of approximately 4.6 million, and generated approximately $14 billion in tourism revenue in 2003.[12]

Ireland's population is slightly over 4 million and in 2004 their tourism revenues were approximately $7.7 billion. They saw an increase of 10% in world travellers and 4% increase in European travellers compared to 2003.[13]

New Zealand's 2004 population is slightly over 4 million and their tourism revenues were $6.1 billion for international revenues, $8.1 billion for the domestic revenues, for a total

[12] http://www.ssb.no/english/subjects/09/01/turismesat_en/main.html* Converted to Canadian $
[13] http://www.failteireland.ie/content.asp?id=377 Converted to Canadian $

tourism revenue for the year-end of March 2004 of $14.2 billion. This represents 18.5% of their export earnings.[14]

Queensland, Australia's 2004 population is slightly under 4 million and their tourism revenues were approximately $14.9 billion. Domestic visitors accounted for 74% and international visitors accounted for 26% of the total visitor nights spent in the state.[15]

International Competition

Competition	**Population (millions)**	**Total Tourism Revenue (billions - Cdn)**
Norway (2003)	4.6	$13.7
Ireland (2004)	4.0	$7.7
New Zealand (2004)*	4.0	$14.1
Queensland, Australia (2004)	4.0	$14.9
British Columbia	**4.2**	**$9.4**

Source: Websites listed below
Note: Foreign currencies converted to Canadian dollars using - http://www.xe.com/ucc/
New Zealand's stats reflect a year-end of March.

International Competitors: Past Performance

	Tourism Revenue (billions - Cdn Currency)				
Year	**Norway**	**Ireland**	**New Zealand**	**Queensland, Australia**	**British Columbia**
1996	NA	NA	NA	NA	**NA**
1997	NA	NA	NA	NA	**NA**
1998	$12.1	NA	NA	NA	**$8.75**
1999	$12.9	NA	$10.0	NA	**$9.05**
2000	$13.8	NA	$11.2	NA	**$9.25**
2001	$14.0	NA	$12.5	NA	**$9.21**
2002	$13.8	NA	$13.2	NA	**$9.32**
2003	$13.7	NA	$14.1	NA	**$8.87**
2004	NA	$7.7	$14.1	$14.9	**$9.5**

Notes: NA- Information not available on accessible websites.
New Zealand's stats reflect a March year-end.
Source: Websites listed below.[16]
Foreign currencies converted to Canadian dollars using - http://www.xe.com/ucc/

[14] http://www.trcnz.govt.nz/Surveys/Key+Tourism+Statistics.htm Converted to Canadian $
[15] http://www.tq.com.au/research - Tourism Queensland Website - Converted to Canadian $
[16] http://www.ssb.no/english/subjects/09/01/turismesat_en/main.html* Converted to Canadian $
http://www.trcnz.govt.nz/Surveys/Key+Tourism+Statistics.htm Converted to Canadian $

8. What are the market sectors or segments in the industry in which BC's companies compete?

The following list describes the range of products offered in BC's tourism market:

Category	**Product**
Winter Products	▪ Alpine Skiing and Snowboarding ▪ Helisking and Snowcat skiing ▪ Other Winter Activities (cross country skiing, ice fishing, ice climbing, snowmobiling, snow shoeing, skijoring, and dog sledding)
Sports Fishing Products	▪ Fishing (Freshwater) ▪ Fishing (Saltwater)
Outdoor Products	▪ Outdoor land based activities (wildlife viewing, hiking, trail riding, guide outfitting, biking, caving, mountaineering, trekking and climbing) ▪ Outdoor water based activities (boating…sailing and cruising, canoeing, kayaking, river rafting, scuba diving, surfing, and wildlife viewing…whale watching) ▪ Parks (Federal, Provincial and Regional)
Touring Products	▪ BC Ferries Inside Passage Cruises ▪ Rail Travel ▪ Alaska Cruise ▪ Automobile/Recreation Vehicle Touring
Urban Products	▪ Built attractions (commercial themed attractions and not for profit heritage sectors, which include museums and heritage facilities) ▪ Events (community events, cultural events, sporting events, etc)
Specialty Products	▪ Golf ▪ Wine Tourism ▪ Spa and Health resorts ▪ Aboriginal Tourism ▪ Agritourism
Business Products	▪ Convention/Trade shows ▪ General Business Travellers ▪ Incentive Travel

The following list describes aspects of tourism infrastructure comprising the BC's Tourism Industry.

Sector	Includes
Transportation	▪ Air Airports: all cities and most towns and villages have an airport in BC. Carriers: Air Canada, International carriers and Regional airlines. ▪ Land Roads: 22,000 km of paved roads, 20,000 of unpaved, and 2,600 bridges. Rail: CP, CN, plus American based Amtrak. ▪ Marine Ferry Services: BC Ferries, Clipper, Washington State Ferries, etc.
Accommodation	▪ Hotels - 610 properties, 43,371 units ▪ Motels - 847 properties, 21,345 units ▪ Campgrounds - 908 properties, 53,806 units
Food and Beverage	▪ Full Service - 3,517 ▪ Limited Service - 3,788 ▪ Caterers - 443 ▪ Taverns - 734

Source: Economic Planning Group, BC Tourism Products: Performance, Trends and Outlook, 2001

9. What is the relative profitability of BC's tourism industry?

As noted earlier, the tourism industry is comprised of a number of sectors which in turn contain a number of products. There are literally thousands of individual businesses that provide goods and services to tourists. The profitability status of these operations likely ranges from poor to good, depending on a host of variables.

10. What is the nature of the value chain or business system for the industry?

This issue is also very sector and product specific. No relevant information was obtained during the research for this analysis.

11. What are the strengths and weaknesses of BC's Tourism Industry?

Tourism Strengths

Compared to other international jurisdictions, British Columbia is a very unique place. The province has a large and diverse range of tourism assets. Some of these "strengths" include:

- A large land mass of 95 million hectares and a relatively small population of about 4 million.
- Over 200,000 lakes and over 400,000 rivers and streams.
- About 6,000 islands and about 7,000 km of coastline.
- The largest island on the west coast of the Americas – Vancouver Island.
- Home of more animal species than anywhere in Canada, including 143 mammal species and 454 bird species.
- About 75 percent of the world's stone sheep, 60 percent of the mountain goats, 50 percent of the blue grouse, at least half of the trumpeter swans, and 25 percent of the grizzly bears and bald eagles.

In addition to these natural resources, BC has some of the best tourism resources and facilities in the world. This includes some of the world's best:

- Boating and Sailing (Gulf Islands and Desolation Sound)
- Cruising (Inside Passage cruise ship route to Alaska)
- Heliskiing (Bugaboos and other Kootenay region areas)
- River rafting (numerous rivers including the Fraser, Thompson and Tatshenshini Rivers)
- Salmon fishing (Gulf of Georgia, inlets and sounds on Vancouver Island and the mainland coast, and the Fraser River)
- Scuba diving (locations around Vancouver Island and the mainland coast)
- Skiing (Whistler is regularly voted one of the world's best ski destinations)
- Whale watching (Orcas in the Gulf of Georgia and the 20,000 strong grey whale migration off the west coast of Vancouver Island)

British Columbia also has several tourism resources and tourism infrastructure that are of international stature. These include:

- Several Vancouver hotels ranked among the best in North America (Michelin Guide)
- Victoria and Vancouver regularly ranked among the most popular travel destinations in North America (Conde Nast Magazine)
- One of the largest ferry fleets in the world (BC Ferries)
- Wide array of fine dining establishments (Victoria is second only to San Francisco in restaurant seats per capita)
- One of the world's most popular show gardens (Butchart Gardens)
- One of the world's most scenic rail tours (Rocky Mountaineer)

The province not only boasts international caliber natural resources and facilities, but is also participating in several emerging or specialty products. These include:

- First Nations Culture
- Wellness and Spa Tourism
- Golf Tourism
- Agritourism
- Wine tours

Tourism Weaknesses

In spite of the province's many attributes and strengths as a tourist destination, BC has a number of weaknesses or issues that need to be addressed. Some of these factors have been described as issues under Question 2, but a partial list of weaknesses is presented below.

<u>Access</u>

Air Access: Sufficient airline capacity at competitive prices is crucial to a successful tourism destination. Many destinations struggle with this issue in an environment of airline consolidations and fuel price surcharges.

Road Access: BC has a relatively efficient road network given its mountainous terrain. Capacity issues are a problem in the Lower Mainland and portions of the interior.

Marine Access: BC Ferries is the main marine link on the coast. The corporation's need to be profitable is likely to cause access problems on the money loosing routes within the network, particularly in the mid and north coast.

Cruise Ship Access: The Port of Vancouver has been loosing home-porting ships to Seattle, with a resulting loss in passenger arrivals. This issue has reduced port charge revenue and spin-off revenues for Vancouver's tourism industry.

Markets

Changing Demographics: The North American and European marketplace is aging and becoming more discerning. Travellers are more educated, more well travelled and appear to be looking for a variety of experiences.

Marketing Exposure: Maintaining a strong marketing presence in the province's selected markets is crucial to increasing visitation. Competition for other destinations can be expected to grow significantly as these jurisdictions also try to improve their competitiveness.

Industry Management

Statistics and Performance Information: As noted, tourism is a difficult industry to document statistically. Better quality and more timely information is needed in order to efficiently track the industry's performance.

Labour Shortages: Demographic changes and the low-wage image of tourism are causing a labour shortage. This trend is expected to continue.

Technology: The travel consumer has become much more in control of their travel experiences through access to the Internet for comparative shopping and for booking. Competitive operations and destinations are devoting significant attention to the function of the web sites.

Industry Development

Resource Availability: BC has an abundance of tourism resources upon which the outdoor adventure sector depends. Although improvements have been made in the commercial recreation tenuring process, it is still a time-consuming and costly process.

Product Mix: Some of North America's most successful tourism destinations provide products that are either not available, or in which BC has difficulty competing. The list of products includes the sun destinations activities (Florida, California, Hawaii), Culture and the Arts (American big cities), and gambling (principally Nevada and Atlanta but most other states).

Distribution of Product: The vast majority of tourism activity takes place in the southwest corner of the province in Vancouver, Victoria and Whistler. Efforts need to be devoted to dispersing tourism activity throughout the rest of the province

APPENDIX "D"

IDENTIFICATION AND RANKING OF KEY STRATEGIC ISSUES

The Committee segmented issues using key categories and each member presented his or her key issues stemming from the prior external environmental analysis and internal environmental analysis. Individual committee members are not associated with a particular issue.

Gateway Issues

The Committee recognizes that Vancouver is the major gateway for destination tourists and that part of its strategic direction is to ensure the new convention centre generates the optimum level of generation of room nights. The Committee identified the strategic issue relating to this as:

How do we ensure the Vancouver Convention Centre enables Vancouver to successfully conduct business?

(Note to Committee: VG advised that her Ministry has hired a consultant to develop recommendations for a governance structure and marketing and sales)

Human Resource Issues

There is a growing gap between the supply of skilled employees for the tourism industry and the demand. As well there is a perception problem in that the industry does not attract career oriented people at the entry level. The Committee identified the strategic issue relating to this as:
How do we continue to source, develop and retain personnel in trained in proper skills and create a desire for workers to make tourism a career?

Marketing Issues

The Committee identified several strategic issues dealing with the marketing strategy to make BC more competitive.
How are we going to address the cruise industry passing over BC?
How do evaluate our positioning against the competitive set of geographic and product sectors?
How do we develop customer acquisition and retention from the PNW corridor? (Southern California up plus Arizona)
How do we position ourselves for a recovering US market and how will they perceive us when it recovers?

How are we going to reinvest and reinvent the brand for tourism to recognize changing consumer needs and competitive forces?
How do adapt the current governments model to recognize competitive forces, different BC tourism organizations and the need for efficient governance in order to effectively compete?
How do we build a successful delivery of the experience – safe, clean, high value (benefits of service)? How we recognize the value of the tourist?
How best to market the connection between tourism, sport, arts, film and culture?

Infrastructure Issues
How can we make access to the Province easier through border, highway air and ferry?
How can we address the issue of increasing threats to safety within BC?

CRITERIA FOR EVALUATION

The Committee members were sent the grid outlined below via email and asked to rank the strategic issues according to three criteria as follows:

1. Importance - 1 being Very Important and 4 being Not At All Important
2. Urgency (short term and long term) - 1 being very urgent within 12 months and 4 being within 5 years
3. Cost - 1 require low financial investment and 4 requiring significant financial investment.

The Committee was requested to complete the grid using the rating scale for each issue. Once all the Committee members replied with their ratings, the Top 3 Strategic Priorities were identified back to the Committee for their consideration in advance of the second meeting on November 14 with the request to develop tangible strategic initiatives that will enable the top issues to be tackled by both the public and private sectors.

Strategic Issue	Importance 1, 2, 3 or 4	Urgency 1, 2, 3 or 4	Cost 1, 2, 3 or 4
How do we ensure the Vancouver Convention Centre enables Vancouver to successfully conduct business?			
How do we continue to source, develop and retain personnel in trained in proper skills and create a desire for workers to make tourism a career?			
How are we going to address the cruise industry passing over BC?			
How do evaluate our positioning against the competitive set of geographic and product sectors?			
How do we develop customer acquisition and retention from the PNW corridor? (Southern California up plus Arizona)			
How are we going to reinvest and reinvent the brand for tourism to recognize changing consumer needs and competitive forces?			
How do adapt the current govt's model to recognize competitive forces, different BC tourism organizations and the need for efficient governance in order to effectively compete?			
How do we build a successful delivery of the experience –			

safe, clean, high value (benefits of service)? How we recognize the value of the tourist?			
How best to market the connection between tourism, sport, arts, film and culture?			
How can we make access to the Province easier through border, highway air and ferry?			
How can we address the issue of increasing threats to safety within BC?			

The actual results of the committee rankings are as follows:

Strategic Issue	Importance 1, 2, 3 or 4	Urgency 1, 2, 3 or 4	Cost 1, 2, 3 or 4	Ranking Before Cost	Ranking Including Cost
How do we ensure the Vancouver Convention Centre enables Vancouver to successfully conduct business?	1,1,4,2,3 = 11	1,1,4,2,3 = 11	2,2,4,2,1 = 11	8	9
How do we continue to source, develop and retain personnel in trained in proper skills and create a desire for workers to make tourism a career?	1,1,1,2,2 = 7	1,1,1,3,2 = 8	2,2,1,3,3 = 11	4	5
How are we going to address the cruise industry passing over BC?	2,3,2,2,2 = 11	2,3,2,1,2 = 10	3,2,2,1,3 = 11	7	7
How do evaluate our positioning against the competitive set of geographic and product sectors?	1,1,4,1,1 = 8	1,1,4,2,1 = 9	1,1,4,1,1 = 8	5	2
How do we develop customer acquisition and retention from the PNW corridor? (Southern California up plus Arizona)	1,1,2,1,1 = 6	1,1,2,1,1 = 6	3,3,2,2,3 = 14	1	4
How are we going to reinvest and reinvent the brand for tourism to recognize changing consumer needs and competitive forces?	1,1,4,3,3 = 12	1,1,4,3,2 = 11	4,4,4,3,3 = 18	9	10
How do adapt the current govt's model to recognize competitive forces, different BC tourism organizations and the need for efficient governance in order to effectively compete?	2,1,4,1,1 = 9	1,1,4,2,1 = 9	1,1,4,2,1 = 9	6	6
How do we build a successful delivery of the experience – safe, clean, high value (benefits of service)? How we recognize the value of the tourist?	1,1,2,1,2 = 7	1,1,2,1,2 = 7	1,2,2,1,3 = 9	3	1
How best to market the connection between tourism, sport, arts, film and culture?	3,3,4,2,3 = 15	4,4,4,3,3 = 18	1,1,4,1,2 = 9	11	11
How can we make access to the Province easier through border, highway air and ferry?	1,1,2,1,1 = 6	1,1,2,1,2 = 7	2,2,2,4,2 = 12	2	2
How can we address the issue of increasing threats to safety within BC?	2,1,3,3,3 = 12	1,1,3,3,3 = 11	2,1,3,2,1 = 9	10	7

APPENDIX "F"

RESORT DEVELOPMENT 2006 ACTION PLAN PREMIER'S TOURISM INDUSTRY ADVISORY COMMITTEE

ITEM	Description	Status	Impact to Other Agencies	Next Steps
New Master Development Agreement (MDA)	The MDA is the comprehensive agreement between the province and the developer of major resorts on crown land. These agreements have been in place for the past 20 years and have been and are currently in place for 12 major ski resorts in the province, including Blackcomb and Whistler. A new MDA template was seen as necessary to promote new investment by: • Providing greater business certainty and security. • Longer tenure term and fixed pricing. • Delegate authority to the resort to enter into direct contracts with "independent operators" to provide a wide range of all season activities and services. • Provide ability to the resort to control access into and throughout the resorts "controlled recreation area" on a year round basis (previously restricted to the ski season). • Increase obligations on behalf of the province to approve dispositions of land that are consistent with the approved Resort Master Plan. This initiative was lead by the Resort Development Unit, MTSA (formerly All Seasons Resort Div., LWBC) and City Spaces consultants and an advisory team made of industry leaders, UBCM Executive and Local Governments.	New MDA template completed March, 2005	No impacts anticipated.	The signing of the first new MDA was announced by the Premier in Revelstoke in March, 2005, involving a $270M expansion of Mount Mackenzie. All new all season resorts will be under the MDA and we are targeting to move all 12 of the existing major resorts onto the new MDA over by the end of 2006. This process will involve consultation with key line ministries and full consultation with First Nations.

Best Practices Guide for Resort Development	This guide was developed as a practical guide to help current and prospective resort developers, operators, communities, provincial government and other authorities who face challenges in the fields of resort planning, development and on-going operations. It provides a wide range of information, including: • Information for working professionals related to planning, design, construction and operation of resort facilities. • Working examples of best practices • Contact details and useful references for obtaining further or more detailed information and; • Best practices organized into four stages, including initial assessment, resort vision, resort master plan and implementation and on-going operations. The initiative was lead by Tourism Policy and Olympic Liaison Unit (formerly Tourism and Small Business Branch, SBED), overseeing a cost shared contract with O'Neil Consulting, which was jointly between the province, federal government and the resort municipality of Whistler.	Report completed in March, 2005.	Positive impact in terms of guide information that will assist agencies in better understanding resort development planning requirements.	Due to election and subsequent restructuring the guide was updated to reflect changes to government and is ready for release upon sign off by the Minister, MTSA.

New All Season Resort Policy Framework	New All Season Resort Policy Framework and Updated Commercial Alpine Ski Policy (CASP) – The primary purpose of this initiative was to promote "all season" investment for both ski and non-ski all season resorts by: • Updating the CASP to reflect the all season nature of resort developments and to support the various changes to the new MDA template agreement. • Expand the key principals of CASP that have been extremely successful in building the ski industry in BC, to other types of non-ski all season resorts. • Updates the Provincial Ski Area Guidelines to foster well balanced, environmentally sensitive, resort development and provides clear direction to guide developers through the planning phases, for the vision stage through to the development of a Resort Master Plan and the signing of a MDA. Initiative lead by Resort Development Unit, MTSA (formerly All Seasons Resort Div., LWBC), working closely with line ministries and key industry association representatives.	Policy framework received internal Ministry approval in July, 2005	No impacts anticipated, key agencies have participated in policy development process and any concerns have been addressed	The new policy framework is ready for announcement. (Announcement date tbd).

Harmonized Resort Approval Process	Harmonized Resort Approval Process: - the objective was to design a more streamlined, efficient process that integrated and harmonized provincial and local government processes and provide greater certainty by: • Ensuring local government and First Nations get involved early in the process, as part of a multi-party review team. • Integrates and Harmonizes approval processes and work plans between the province and local government. • Increases certainty for proponents and investors by providing a preliminary, high level land use decision by both levels of government, early in the process. • Provides a more streamlined and efficient process by eliminating duplication and ensuring both levels of government arrive at key decision points at the same time. This initiative was lead by the Resort Development Unit, MTSA (formerly All Seasons Resort Div., LWBC) and City Spaces consultants and an advisory team made of industry leaders, UBCM Executive and Local Governments.	Report completed August, 2005. Presented at UBCM workshop on September 29/05.	Anticipated positive impact in terms of agencies participating in a single, harmonized process versus duplication of efforts by agencies that participate in both provincial and local government processes.	Identify pilot projects and develop a more detailed process design and guidelines, based on working experience.

On the Right Track – A Guide to Creating Best Practices for First Nations and Resort Partnerships	The guide was written for First Nations, Developers and Operators seeking to develop new or expand existing resort facilities in partnership with each other. The guide covers a wide range of topics, including: • Understanding Best Practice and First Nations culture. • Developing partnerships and how to get started. • Looking at case studies and the keys to success. • Identifying the tools for effective partnerships and speaking the same language. This initiative was lead by Tourism Policy and Olympic Liaison Unit (formerly Tourism and Small Business Branch, SBED), working with a consulting team, who carried out extensive interview with First Nations, resort developers and local governments.	A draft report has was completed and submitted to government in August, 2005.	Guide should be a useful source of information for agencies wanting to establish partnerships with, and who are involved in consultation processes with, First Nations.	The guide is currently being reviewed by the Ministries of Aboriginal Relations and Reconciliation and Attorney General.
Transfer of Timber Harvesting for Major Resort Areas	This initiative provides for the transfer of timber harvesting and administration from MOFR to MTSA, for those crown lands within approved "Controlled Recreation Areas" of major resorts. The affect of this transfer will: • Recognize the long term land-use decision is for resort development, not commercial forest production. • Ensure resort objectives are top priority in terms of on-going decisions affecting forest management. • Allow resort operators to deal with a single agency within government who is responsible both land and timber matters. • Will provide for a more responsive and efficient processing of land and timber tenure requirements. This initiative is being led by MTSA and MOFR and has involved consultation with key industry representatives.	A Decision Note was approved by Ministers Abbott, de Jong and Santori in October, 2004. Supporting legislation is targeted for Spring, 2006.	Primary agencies affected are MTSA and MFR. A positive and effective working relationship has been established between the two agencies in developing a comprehensive MOU which sets out the agency's respective roles and responsibilities.	An MOU is in final draft and is targeted for signing by the respective DMs in October, 2006. MTSA is taking the lead, with legislative council in developing the appropriate supporting legislation.

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<td>Sale of Remote Sites</td>
<td>Involves the development of a “remote land sales” policy, intended to promote new investments by providing an increased level of security through fee simple ownership.
Key features of the policy include:
Sale would be limited to smaller, intensively developed lodge sites.
Sale would be restricted to intensive sites that were associated with an extensive commercial recreation operation, covered by crown tenure.
The fee simple lands would be tied to the crown tenure in such a manner that would not allow either the fee simple land or the crown tenure to be transferred separately.
Sale would only occur after full consultation with key agencies, First Nations and affected stakeholders.
This initiative is being led by MAL and MTSA and has involved consultation with line ministries and key industry representatives.
Specific deliverables for MTSA under this initiative include completion of the sale of 51 remote sites over the next 5 years.</td>
<td>Policy has been delayed. (need to confirm current status with MAL).</td>
<td>Full agency consultation will be completed prior to policy approval and implementation.</td>
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Rewrite of the Commercial Recreation Policy (CR)	This initiative involves a comprehensive rewrite of the CR policy, renamed “Adventure Tourism” (AT), as part of the development of a broader Commercial Tourism & Resort Program Framework. The key priorities for consideration of the policy rewrite include:
	• modernizing tenure policy for all forms of nature-based tourism businesses operating on Crown lands:
	  o pricing, overlaps, incidental use, new tenure options.
	  o harmonizing tenure policies and procedures between LWBC and MWLAP, etc.
	• All Season Resort policy development and implications/opportunities for AT (linked to above AT Policy review).
	• Carrying capacity and Limits of Acceptable Change (with MSRM, MWLAP and Outdoor Recreation Council).
	• Tenure security/certainty issues and policies, including conflicting tenures and compensation.
	MTSA is leading the policy development, working closely through a joint steering committee with the Wilderness Tourism Association and planned workshops. Consultation is planned with key resource agencies and external stakeholders.
		Completion is targeted for Spring/06	Policy is still under development and full agency consultation is being conducted. Resulting policy should help key resource agencies, industry and the public, by addressing a number of key issues that have been an outstanding concern, i.e. overlapping tenures, carrying capacity, etc.	• Develop communication plan.
				• Deliver joint government and industry TA workshop.
				• Carry out internal/external consultation.
				• Consult with tre options.

<u>APPENDIX "G"</u>

BC Regional/Local/Small airports formerly operated by Transport Canada

Airport Type Status Current Owner

Abbotsford Regional/Local Transferred Municipality
Campbell River Regional/Local Transferred Municipality
Castlegar Regional/Local Transferred Municipality
Comox Regional/Local Transferred Airport Society[7]
Cranbrook Regional/Local Transferred Municipality
Dawson Creek Regional/Local Transferred Municipality
Fort Nelson Regional/Local Transferred Municipality
Fort St. John Regional/Local Transferred Airport Society
Kamloops Regional/Local Transferred Municipality
Nanaimo Regional/Local Transferred Airport Commission
Penticton Regional/Local Not transferred Transport Canada
Port Hardy Regional/Local Not transferred Transport Canada
Prince Rupert Regional/Local Transferred Municipality
Quesnel Regional/Local Transferred Municipality
Smithers Regional/Local Transferred Municipality
Terrace Regional/Local Transferred Airport Society
Williams Lake Regional/Local Transferred Municipality
Tofino Small Transferred Regional District