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Bella Coola Valley

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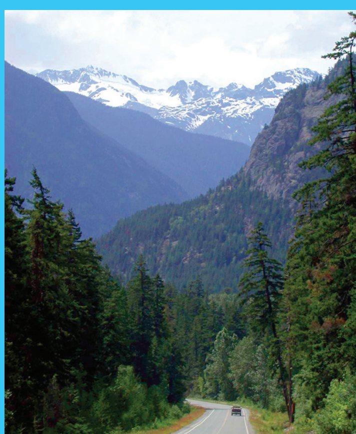


Bella Coola Valley Tourism Strategy

Report 1 of 2

Development Plan

CLEAN AIR
CENTRAL COAST REGIONAL DISTRICT
CLEAR WATER

Bella Coola Valley Tourism
Central Coast Regional District

Lions Gate Consulting
Simone Carlysle-Smith
Terra Firma Digital Arts

July 1, 2006

The Coast Sustainability Trust
Cariboo Chilcotin CFDC
British Columbia
Canada

Executive Summary

Figure 1: Strategy Overview

CURRENT SITUATION

Local Indicators
Industry Structure
Travel Markets
Travel Trends
Future Demand

MISSION

Serve citizens of the Bella Coola Valley by encouraging tourism development, helping industry succeed, marketing the Valley and its products, providing quality visitor services, and developing a unique visitor destination by cooperating with local stakeholders and government.

GOALS

Enhance the tourism experience through product, infrastructure and destination development.
Grow visitor volumes, length of stay and spending through brand development and the strategic deployment of market resources.

DESTINATION DEVELOPMENT

- Nature-based
- Cultural & heritage
- Attractions
- Infrastructure
- Amenities and Services
- Partnerships

MARKET DEVELOPMENT

- Core programming
  - Research
  - Communications
  - Industry development
  - Visitor services
- Marketing
  - Positioning
  - Brand identity
  - Targeting
  - Promotions
  - Partnerships
  - Packaging
  - Travel Trade
  - Tools and materials

BRAND DEVELOPMENT

- Positioning
- Logo
- Word mark
- Photo bank
- Signature images
- Advertising copy
- Brand implementation

Central Coast Regional District

Bella Coola Valley Tourism

Bella Coola Valley Tourism (BCVT) in association with the Central Coast Regional District (CCRD) has commissioned a consulting team led by Lions Gate Consulting to produce a Bella Coola Valley Tourism Strategy consisting of three major components: branding, development plan and marketing strategy.

As seen in Figure 1, the strategy comprises three main components, the development plan, marketing strategy and branding. The branding and the marketing strategy are closely associated and will be integrated in the final promotional plan.

DEVELOPMENT PLAN

The development plan (volume 1 of 2, ***this report***) is oriented toward developing the Valley as a visitor destination, building more tourism product and planning for new or expanded infrastructure. Strategy recommendations include the following:

Nature-based products

1. Meet with existing operators to identify opportunities, constraints and possible next steps.
2. Investigate opportunities relative to Management Plan review for Tweedsmuir Park (South).
3. Assist with preparing a wildlife viewing strategy on the Atnarko River.
4. Prepare a landscape plan that identifies locations and opportunities for new tourism activities.
5. Promote an expanded selection of rental vehicle availability.
6. Create more opportunities for sport fishing.

Cultural & Heritage

7. Assist the coordination of culturally themed tours.
8. Create a Day Pass that packages together several cultural attractions.

Attractions Development

9. Commence preparation for a waterfront/estuary plan
10. Conduct a feasibility assessment of a First Crossing of North America Interpretive Centre.

Infrastructure

11. Work on optimizing commercial usage of broadband services.
12. Continue to pursue the continuance and expansion of the Discovery Coast Passage service.
13. Provide planning and facilitation assistance for trails and recreation sites availability.
14. Determine the feasibility of expanded transit services for visitors.

Amenities and Services

15. Develop a beautification plan for implementing public and private upgrades in the town.
16. Create more riverfront recreation access.
17. Improve destination and directional signage.
18. Undertake the Bella Coola Valley entrances project.

Partnerships

19. Encourage more linkages among aboriginal and non-aboriginal tourism organizations.
20. Work with existing tour operators to ensure petroglyph features are managed and protected.

MARKETING STRATEGY

The purpose of the marketing strategy (volume 2 of 2) is to provide the Bella Coola Valley Tourism association with a plan that can be implemented to strengthen the market position and promotion of the Bella Coola Valley. The focus of this strategy is to build a foundation to ensure the Valley can compete with other communities. Strategy recommendations include the following:

Core Programming

Core programming refers to those activities that provide a context for marketing and promotion, which remain the key element of this strategy. Recommended programs include:

1. Maintain research on an annual basis based on sources provided.
2. Establish and maintain a resource library for industry in both hard copy and web versions where possible.
3. Establish and maintain a comprehensive inventory as part of the web strategy with support through the Service Canada agency for an administrative assistant for the first year.
4. Establish and maintain an online database of tourism products, businesses, area features and media as part of the web strategy.
5. Establish and maintain a communications program with industry and the community.
6. Establish and maintain a tracking and evaluation system that balances the current resources of BCVT and requirements for occupancy tracking for the CCRD
7. Establish an industry development program. Launch with the Media Relations workshop from TBC; Encourage adoption of industry and government standards by tourism operators; Promote the delivery of viable entrepreneurship and skill development programs to encourage more First Nations tourism businesses; Facilitate access to enterprise facilities offered in the region; Optimize benefits and opportunities from emerging tourism development clusters such as heli-skiing.

Marketing and Promotion

Marketing and promotion deals primarily with positioning, targeting, selling and delivering the Bella Coola Valley brand to market. The promotional strategy will be integrated to serve the visitor effectively throughout the purchase cycle (awareness, interest, evaluation, purchase, loyalty). Recommended steps include:

1. Establish and maintain an annual planning process, commence with the production of the Marketing Plan for 2006/07.
2. Establish and maintain a core partnership strategy with the Western Chilcotin Tourism Association, Williams Lake Central Cariboo Tourism and the CCCTA for further expansion with other partners.
3. Make application for government grants and tourism programs that will assist in the implementation of the integrated marketing strategy, which includes building a foundation for marketing and communications including a new website, inventory, marketing materials and equipment in preparation for promoting the Valley.

Branding

Branding and other marketing tools and materials will be presented and integrated into the strategy. Key components include branding deliverables, image bank, facts and editorial bank, display equipment, digital still and video camera, stationery, kit folder, press kit, visitor guide, maps, merchandise and website.

1. The branding project is currently in production with initial designs for the logo treatment.
2. The initial image bank for the BCVT will be completed with 80 images and is currently in production as part of the branding strategy.

Table of Contents

1 INTRODUCTION

PREAMBLE

Bella Coola Valley Tourism (BCVT) in association with the Central Coast Regional District (CCRD) has commissioned a consulting team led by Lions Gate Consulting to produce a Bella Coola Valley Tourism Strategy consisting of three major components: branding, development plan and marketing strategy.

BCVT is a BC-registered society and voting member of the Cariboo Chilcotin Coast Tourism Association. In the 1980's Tourism Bella Coola was founded to address the unique tourism issues and concerns in the Valley. Its successor organization, BCVT, was formalized in 1992 and now lists more than 50 members with a common interest in promoting the Bella Coola Valley. BCVT's mission is to:

> "Work together to promote tourism development in the Bella Coola Valley by marketing, organizing tourist information services, lobbying government on behalf of tourism stakeholders and encouraging local business to succeed and grow."

BCVT has delivered a limited, annual marketing program for the past four years, but has yet to undertake a comprehensive planning exercise. BCVT now wishes to move forward with strategic marketing and development to ensure growth, linkages and consistencies are included in all product and service areas. With the plan in place, the community anticipates entrepreneurial investments will be made in the strategic areas.

BACKGROUND

The Bella Coola Valley has experienced negative socio-economic challenges in the past few years. Internal and external factors continue to impact the communities, requiring innovative strategies for both the public and private sectors. The economy has traditionally been based on natural resource extraction, which, unfortunately, has declined in recent years and left the community with limited long-term benefits.

Tourism remains one of the few economic base sectors (i.e. export-oriented and wealth creating) that can be developed and controlled at the local level, by stakeholders, leaders and businesses. The fact that tourism is largely small business-based and consists of operators who must to a greater or lesser degree cooperate in creating the visitor experience (i.e. the product) is further reason for seeking development solutions from within the community. The exceptional natural and heritage attributes of the Valley have yet to reach their potential for drawing in visitors and creating the employment and income the community needs. The goal of this planning process is the incorporation of branding, marketing and product development elements into a cohesive plan that provides direction and purpose for tourism development and growth in the Bella Coola Valley over the next three years.

Project Objectives

The following objectives have been established for this study:

- Branding

    - Work with the BCVT Branding Committee and other interested sector representatives to devise, produce and deliver a complete branding package and implementation plan to include Word mark, artwork, ad copy and design and web page layout.
    - Create a photo bank with a minimum of 80 digital images.
    - Recommend implementation steps for the brand.

- Tourism Development Plan

    - Create an inventory of existing tourism products and assets/attractions.
    - Make recommendations for establishing Bella Coola Valley as a more recognized destination.
    - Identify strategies and action priorities to optimize local resources and private and/or public investment attraction.
    - Prepare a three year tourism plan to guide development activities.

- Tourism Marketing Strategy

    - Identify appropriate target markets.
    - Devise strategies to attract identified target markets.
    - Prepare an annual budget.
    - Recommend mechanisms, indicators and measures for monitoring marketing activities.
    - Prepare a three-year, tourism marketing strategy.

Purpose of This Report

Three reports are being prepared for this project, a current situation report (included as Appendix 1), a Development Plan (volume 1 of 2, ***this report***) and a Marketing Strategy (volume 2 of 2).

This Development Plan focuses on tourism product and infrastructure needs of the Bella Coola Valley. Together with the marketing strategy and the branding deliverables, the three components will be implemented simultaneously over the next three years.

The content and direction of this report was based primarily on past planning documentation, the results of the focus groups that took place in Bella Coola in November, 2005, and follow-up stakeholder interviews conducted in January, 2006.

2 Plan Direction

Tourism Vision and Mission

A vision statement describes a desired future state for the community. It provides an important direction-setting path for economic development efforts. The Bella Coola Visions and Principles Committee issued a community vision statement in 2004 that foresaw Bella Coola as "a caring, self-reliant, sustainable community supported by a diversified, locally-influenced economy that operates within the healing capacity of a clean, healthy natural environment." This vision was reproduced in the 2005 Economic Development Strategy. As the tourism development plan is a companion piece to the Economic Development Strategy, the spirit and thought as expressed in the current vision statement will help guide this plan.

A mission statement answers the questions who do we serve? What do we do and how do we do it? It is meant to be concisely written and set the stage for presenting goals and objectives. The existing mission of BCVT refers to:

- promoting tourism development;
- marketing;
- organizing tourist information services;
- lobbying government; and
- encouraging local business to succeed and grow.

The focus groups added further elements including:

- serving citizens of the Bella Coola Valley;
- preserving and interpreting cultural and heritage resources;
- creating partnerships with stakeholders;
- working with industry on marketing the Valley; and
- providing leadership to enhance the community as a visitor destination.

Goals

The 11 goals that emerged from the research process are grouped below into product development and marketing themes:

1. Enhance the Bella Coola Valley's tourism experience by:

    - Developing more market-ready product and experiences, especially those that take better advantage of the region's exceptional natural, historical and cultural resources.
    - Creating a destination attraction that will be a centerpiece for tourism.
    - Strategically placing and improving local infrastructure that will enhance the destination.

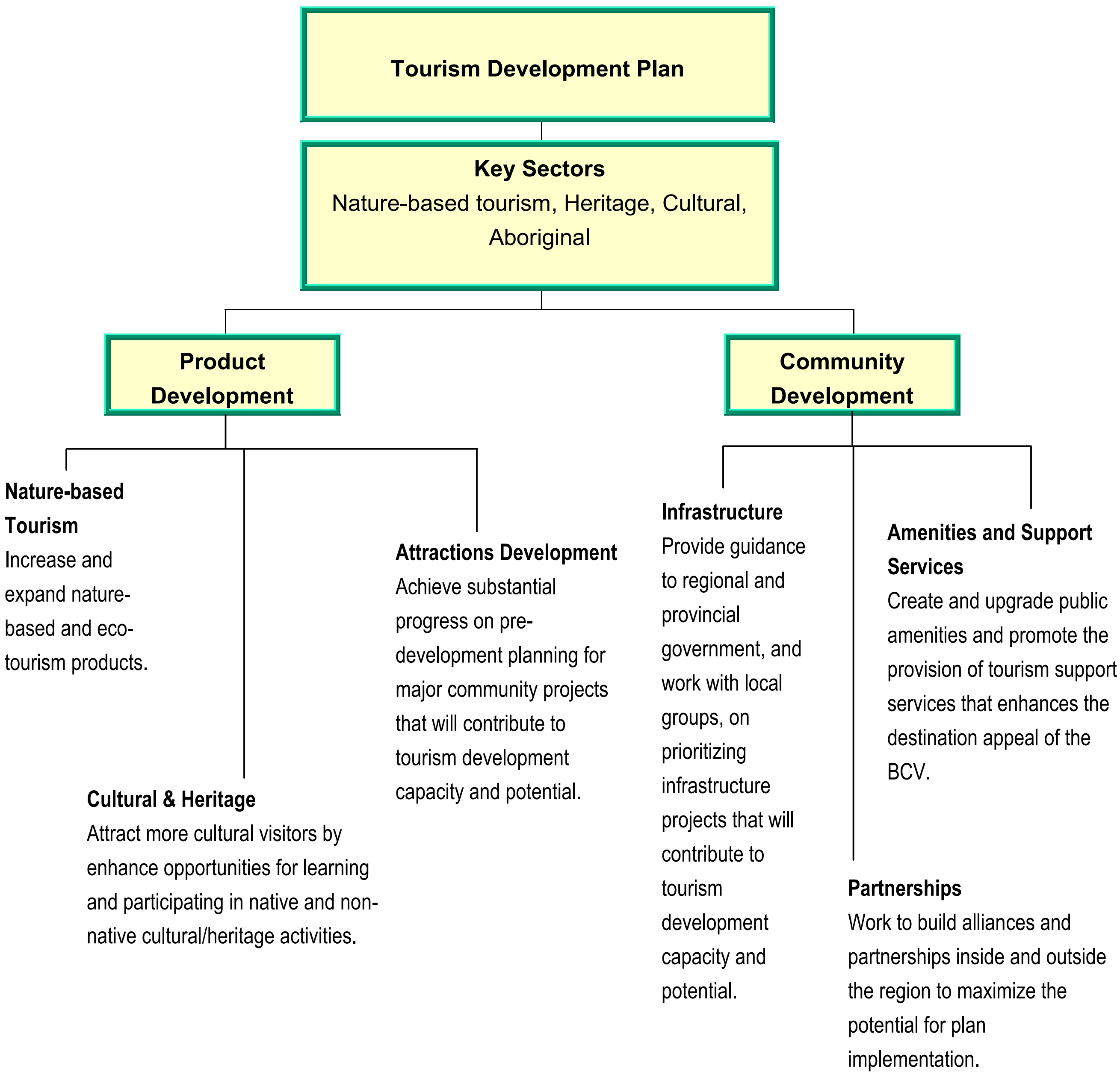
- Expanding transportation services that will give visitors additional opportunities and options for arriving and departing the community at all times of the year.
- Developing partnerships that increase community involvement.

2. Create a sustainable visitor market base by:

- Promoting the Bella Coola Valley community brand.
- Extending market reach and increasing awareness in key leisure travel markets.
- Increasing visitor volumes year round, including off and shoulder seasons.
- Increasing overall length of stay by visitors.
- Increasing spending amounts by visitors.

3 Destination Development

Figure 2: Overview of the Tourism Development Plan



PRODUCT DEVELOPMENT

Nature-based Tourism

Objective:

Develop or expand nature-based, outdoor recreation or eco-tourism products that best utilize the unique features of the Valley and create an overall better visitor experience.

Rationale:

One of the greatest strengths of the Valley is its accessible wilderness characteristics and the opportunities they afford for nature-based tourism activities. The UNBC visitor survey indicated that most visitors are active, educated and ready to take part in outdoor adventures. Some travellers also expressed frustration in trying to engage in nature-based activities and would likely increase their stay and spending with improved access to these features.

Steps:

1. Meet with existing operators to identify opportunities, constraints and possible next steps for developing further guided and self-guided products. Discussions with operators in the neighbouring Chilcotin and outer Coast regions could also help in identifying inter-regional areas of cooperation and packaging.
2. Investigate tourism development opportunities relative to the Tweedsmuir Park (South) Management Plan review. Tweedsmuir Park comprises many natural history features, as well as some incredibly diverse landscapes in the Coast Mountains and Interior Plateau regions. A new management plan may be prepared by BC Parks with possible opportunities to increase the commercial use of park assets and features to stimulate commercial recreation activity. However, previous plans have been based on maintaining wilderness values and have not emphasized commercial activities. Depending on how BC Parks intends to accommodate increased use, there may or may not be significant commercial opportunities.
3. Assist with preparing a bear viewing strategy on the Atnarko River. This easy-to-access location is an almost guaranteed opportunity for grizzly viewing during the summer and autumn seasons. Developing it into a sustainable, and safe, visitor product would significantly enhance the Valley's destination status and could provide a much needed boost to shoulder season visitation during late September and October. There are very few areas in the world where grizzly viewing is possible in such an accessible spot. According to some of our focus group participants, bear viewing in the Park is not well controlled and it is becoming increasingly difficult to manage. The degradation of this experience would be fateful. One of the key issues is the conflict between drift boats on the river and on-shore viewpoints. BC Parks is now undertaking the preparation of bear viewing guidelines - steps should be taken to more proactively manage visitor expectations and experiences.

4. Prepare a landscape plan that identifies locations and opportunities for new tourism activities. This should involve an initial set of discussions with government staff at the former Land and Water BC offices, now part of the new Ministry of Agriculture and Lands. A map set and accompanying database of existing commercial recreation licensees and tenure applications should be requested. Some activities identified in the focus groups include:
    - Cat-skiing - Over the past two years, backcountry tenures for heli-skiing have been issued and the region is rapidly gaining awareness as a heli-ski destination. These outfits have proved very successful to date and have helped diversify product markets into the important winter season. Over the longer term the community should investigate cat skiing areas where tenures could be established.
    - Marine tours – Access to the marine features of Bella Coola, both river and tidewater, are limited and many visitors have very little opportunity to experience some of the unique, related ecosystems, heritage features and recreational opportunities.

5. Promote an expanded selection of rental vehicles that will encourage more visitors to stay and experience some of the activities currently available. Most tourism operators will arrange in-region transportation (usually a car rental) for their guests who arrive by air or ferry without their own vehicles. These tend to be typical sedans suitable for highway travelling. There may be an opportunity to encourage more road and off-road touring throughout the Valley by having more trucks, 4X4s and possibly ATVs. These rental vehicles would also allow outdoor adventurers to more easily transport sports equipment such as kayaks, canoes and mountain bikes, around the Valley.

6. Create more opportunities for sport fishing, targeting the family market and general touring market that may not view fishing as a primary activity but would be interested in it as a secondary activity. The sale of fishing licences has remained relatively stable over the last few years so there is continued visitor interest in sport fishing. The pink runs are ideal for family fishing because the fish are relatively easy to catch. This initiative would involve creating more access points to the river (explored in the infrastructure section), ensuring visitors have the appropriate maps and directions, and possibly packaging in after-catch services such as cleaning, filleting and even smoking. The focus would be on an un-guided safe and convenient fishing experience.

Cultural and Heritage

Objective:

Attract more cultural visitors by enhancing opportunities for learning and participating in native and non-native cultural/heritage activities that have the support of both communities.

Rationale:

Cultural tourism programs not only provide opportunities for visitors, they contribute to a community's quality of life. They provide economic benefits that can be measured through event admissions, sales of items associated with program activities and increases in retail sales of local products and services as a result of these activities.

Steps:

7. Assist with the coordination of culturally themed tours. According to travel statistics, cultural tourists spend more money than the average traveller per trip, take longer trips, shop more and are more likely to spend their nights in local hotels, motels and bed and breakfasts. Cultural tourism is also one of the fastest growing tourism sectors in Canada.

   Approximately five tour buses annually travel to Bella Coola during the summer and early fall months. As well, a significant number of individual touring visitors also come to the region. In order to offer more activities and experiences for these visitors and entice them to lengthen their stay in the area the development of specific culture tourism activities would be beneficial. Existing cultural features could be given a higher profile, while different aspects of native and non-native culture/history could be incorporated into new products. Native cultural tourism products are particularly popular among European travellers. Add to this the fact that travel market data indicates most travel markets to BC are dual-track, i.e. are interested in more than one activity. Expanding the cultural tourism element in BCV makes good product development sense.

   This would be a good way to coordinate artists, cultural attractions and businesses that provide relevant products and services into a formal product. It could include the museum, the hatchery, the Norwegian Heritage House, the Mackenzie Trail and visits to other historic sites and attractions. The major components could be self-guided walking, hiking, biking and road tours with an option to package something similar for group bus tours. Programming could be modified to include musical, artistic and dramatic performances, symposiums, festivals, workshops and other special events that focus on the historical, cultural and natural significance of the Bella Coola Valley when they occur. There are several good local artisans in the valley. These artisans could potentially increase their market sales and therefore their income through a more formal marketing and product network.

8. Create a Day Pass that packages together several cultural attractions and encourages a full day activity for visitors. An arts project or event can be packaged with other area arts and culture programs, business services or even outdoor recreation products. The Canadian Tourism

Commission has found that heritage tourism enthusiasts have relatively wide-ranging tourism interests, with a particular emphasis on the outdoors.[1] The Day Pass is a single ticket that includes a package of products and services and is designed to provide a full-day experience for visitors and residents. A sample Day Pass could include base admission to the Discovery Coast Music Festival, the rodeo or the Fall Fair and supplemented with admissions to other venues such as the museum, coupons at convenience stores and complimentary maps and directions to other sites and attractions from the VIB.

Attractions Development

Objective:

Achieve substantial progress on pre-development planning for major community projects that will contribute to tourism development capacity and potential.

Rationale:

The Bella Coola Valley is known for its spectacular fiord-like scenery, wildlife, outdoor adventure activities and history. The major attraction of the region is its natural wonders, and while "built" attractions do exist, there is still a tremendous upside potential for creating more destination focal points by interpreting and enriching the natural and heritage features that visitors would like to see.

Steps:

9. Commence preparation for a waterfront/estuary plan. The Bella Coola estuary has excellent tourism potential, with ecological, recreational and heritage features that could diversify existing tourism offerings and serve as a focal point for investment in tourism plant and infrastructure. One of the results of the 2005 visitor survey was the disappointment visitors expressed in not being able to get closer to the waterfront and experience water-based activities. There is reported excess demand for tie-up, moorage space and other facilities and services for pleasure craft - a growing sector. There is also a strong desire to have a public waterfront focal point for the community. Estuary conservation would also be planned. A key issue would be planning for access and the relationship between public and private property and frontage. Access to the waterfront from the town centre is limited and private property limits current development options. Yet there are sites that might have a higher and better use in tourism.

   Squamish has aggressively pursued the redevelopment of its downtown and waterfront in recent years. A 2004 Squamish Downtown Waterfront Concept Plan was prepared by UBC's Sustainable Communities Program with the assistance of the Fraser Basin Council.[2] A similar approach could be used in Bella Coola.

   The community obtained a map set of the waterfront/estuary area and the University of BC prepared a conceptual/historical design booklet.

[1] Canadian Tourism Commission, 2002.
[2] See http://www.sgog.bc.ca/content.asp?contentID=130

10. Conduct a feasibility assessment of a First Crossing of North America Interpretive Centre. The story of Alexander Mackenzie's journey by land from Lake Athabasca to Bella Coola in 1792-93 is one of the defining stories in the history of the west and the exploration of Canada. An interpretive centre that told Mackenzie's story and the other heritage and natural aspects of the Bella Coola Valley could be a real drawing card for visitors. Such a concept will take years to implement, so the initial focus during the next three years will be on building a vision for the centre, gaining community and stakeholder support and undertaking pre-development planning such as a feasibility assessment and design concepts that will facilitate fundraising and the eventual business planning and construction of the centre.

    Ideally, this facility would include a significant First Nations' component, but this may not be supported or acceptable to the Nuxalk. Any pre-development planning would want to address this issue and explore options, including the possibility of a separate aboriginal cultural centre.

COMMUNITY DEVELOPMENT

Infrastructure

Objective:

Provide guidance to regional and provincial government, and work with local groups, on prioritizing infrastructure projects that will contribute to tourism development capacity and potential.

Rationale:

The Tourism Industry Association of Canada has stated that more than half its members consider tourism infrastructure a top priority issue. New investments in physical capital assets that allow tourism activity, including transportation and communications systems, are critical for creating the right conditions for investment in complementary products and services. In the Bella Coola Valley, the lack of infrastructure has always been an impediment to economic development of any kind, including tourism. We know from visitor surveys and anecdotal evidence that there is a top tier of infrastructure issues that require ongoing attention to ensure tourism remains a viable economic sector. The 2005 UNBC visitor survey indicated that what visitors disliked most about the region was road conditions, signage, accommodation, aesthetics in the town itself and garbage. Visitors who stayed for one day or less suggested that improvements to the road, changes to the ferry schedule, more entertainment and public facilities, such as picnic tables may encourage them to stay longer.

Steps:

11. Work on optimizing commercial usage of broadband services in the Valley and particularly to tourism operators. Telecommunications services are limited in Bella Coola and limit the use of the Internet for marketing, e-commerce, communications and business management. A local broadband infrastructure has been installed and is operational.

12. Continue to work with the CCRD and BCVT for the continuance and expansion of the Discovery Coast Passage service. The BC Ferries service to Bella Coola from Vancouver Island is a major mode of transportation for visitors to the Valley. The recent sinking of the Queen of the North, in association with extended 2006 sailing season and expanded spring service, should be closely monitored for their impacts on tourism activity. The results may provide enough argument to assist with lobbying for service to the end of September. Cooperation with Port Hardy, which is lobbying BC Ferries for a year-long ferry to Bella Coola, could create a region-wide lobbying effort.

    Once the economic benefits and capacity utilization of the extended 2006 season are documented, a business case for extended service could be prepared. Other components of this document would be the continued expectation for a new ferry once the Queen of Prince Rupert is replaced on the Inside Passage route, and the feasibility of a longer term contract for the Discovery Coast Passage Route. The lack of long-term commitment to Bella Coola from BC Ferries is a drag on investment in tourism infrastructure, attractions and services.

13. Determine the feasibility of an expanded transit service between Williams Lake and Bella Coola that could be marketed to visitors who arrive in the community without ground transportation (e.g. ferry and air passengers). The hospital has received financial support from BC transit to operate a regular bus service within the Valley and it might be feasible to expand and market this service to visitors and even extend service to Williams Lake.
14. Provide planning and facilitation assistance to groups working on keeping trails and recreation sites available for public and visitor use. When the BC Forest Service dropped its recreation program, it left a significant void in the province's overall outdoor recreation and tourism infrastructure. Approved trails and campsites, in particular, served a valuable role in providing access to significant tourism features and opportunities for low-cost camping. In the Bella Coola Valley, there is a large inventory of trails and recreation sites that could be maintained, upgraded, rebuilt and enhanced as a way of improving the options available to visitors to the Valley. The UNBC visitor survey showed that close to one quarter of all highway travellers participated in hiking activities so it is important to maintain these opportunities. The Valley Trail Network Committee, a group of concerned citizens and volunteers have begun to maintain Valley bottom trails and should be the conduit for further action. Priority should be placed on a trails management plan, which would include stewardship, maintenance and future funding options. The adopt-a-trail initiative should be supported.

Amenities and Support Services

Objective:

Create and upgrade public amenities and promote the provision of tourism support services that enhances the destination appeal of the BCV by increasing the comfort level of visitors and encouraging them to participate in more activities.

Rationale:

The visitor experience in a community is influenced by the natural landscape, the built environment and inter-personal interactions with frontline operators, service businesses and the public. Tourism is thus closely linked with the internal conditions of the community itself, including its physical look, facilities and amenities that serve the public as well as visitors. In Bella Coola, better access to amenities and services that improve the visitor experience would complement the product development and marketing efforts elsewhere in this plan.

Steps:

15. Develop a beautification plan for implementing public and private upgrades in the town. A scheduled financial commitment for street improvements is long overdue and has most recently been identified as a priority. While public participation is important, it is equally necessary to engage landlords and merchants in this initiative. Possible ideas include the following:
    - Public art program
    - Mural project

- Professional window treatments
- Facade improvement program
- Policies and guidelines on cleanliness
- Building maintenance and upkeep

16. Create more riverfront recreation access. There are very few access points where visitors could go to rest, picnic, swim, fish and otherwise view the riverfront. This project would involve an identification of preferred sites and a clarification of legal rights-of-way that may exist but be unknown to the public or to visitors. According to the land title act, any subdivision of property automatically creates a public right-of-way to navigable waters in Canada. Over the years there have been numerous subdivisions along the River and therefore legal rights-of-way from the highway. The Watershed Society also has an interest in this issue and could work cooperatively with BCVT and the CCRD on clarifying the legal implications of public access to the River. Once this is done, a management plan that would include some infrastructure spending on access and site improvements should be prepared.
17. Undertake the Bella Coola entrances project. BCVT proposes to construct two significant "Welcome" areas at either end of the Valley corridor. One will be constructed at the terminus for BC Ferries, the other, at the east end of the Valley where visitors catch their first glimpse of the Valley floor. The first proposed sign would be a unique, three dimensional structure to be placed near the ferry dock, clearly identifying that the visitors have arrived in the Bella Coola Valley, and demonstrating which direction they should turn. The area around and under the sign will be enhanced with appropriate and easily maintained hard and soft landscaping. The second billboard-size would be at the pullout just outside the gate to the Hill with low maintenance landscaping to enhance the entry point. An application for funding support has been made to the UBCM Community Tourism Program.
18. Improve destination and directional signage that complements the entrance signs. Even with a completed entrances project, signage for visitors is required to keeping them in the Valley longer. Visitors can be easily disoriented and may be unaware of key recreational features and opportunities, inside the downtown area or along the Highway. The community needs a better understanding of visitor needs and expectations on which to build a signage strategy. Funding from the Northern Development Initiative Trust and the Coast Sustainability Trust has been tentatively identified for sign improvements.
    - A major gateway sign for the Discovery Coast Highway in Williams Lake should be investigated. Apparently, a significant number of visitors to Williams Lake VIC are interested in travelling Highway 20. A major sign would encourage more road travel and visitor enquiries.
    - Many communities have successfully developed community signage programs, some with relatively few resources. A signage program could be coordinated with the Branding strategy. Research of best practices in community signage could provide valuable direction.
    - Community stakeholders should be involved since signage has to appeal to local as well as visitor needs.

Partnerships

Objective:

Work to build alliances and partnerships inside and outside the region to maximize the potential for plan implementation.

Rationale:

There is an opportunity in the study area for achieving First Nations tourism development through the creation of partnerships, networking and relationships that will bring together all available regional assets into a coordinated development program.

Steps:

19. Encourage more linkages among aboriginal and non-aboriginal tourism organizations that can lead to new partnerships for the implementation of this plan. For First Nations, there are many supporting organizations, including the Aboriginal Tourism Association of British Columbia, the Canadian National Aboriginal Tourism Association, and Aboriginal Tourism Team Canada (part of the Canadian Tourism Commission), that could provide input into new product and market development. Further involvement by First Nations and other cultural organizations in the operations of the VIB would be beneficial. Most visitors to the study area have no awareness or understanding of cultural tourism activities.
20. Work with existing tour operators to determine the carrying capacity of the petroglyph tours and propose resource management options to ensure the feature is not degraded or damaged. The management of this important asset could include some site infrastructure to minimize ground disturbance and enhance carrying capacity. Bridges and trails are now maintained by volunteers. A regular scheduling of tours and maximum group sizes can further help site management by temporally spacing out visitors. There may be potential for a guardian or steward's position in the summer months to directly maintain and protect the site. This initiative should be led by the Nuxalk First Nation as this is an important cultural site.

4 PLAN SUMMARY

This following table provides a plan summary that can be used to prioritize strategies and help with the preparation of annual work plans. We have prepared the following guidelines to help with this process:

- The initiatives that follow are all considered important and there is no implied prioritization by the order in which they are presented.
- Each section has some strategies that should be pursued immediately, while others should be deferred. For each strategy, we have suggested completion dates for a three year planning horizon.
- The ability to implement strategies will depend on 1) the availability of time, resources and funding, and 2) the participation of lead agencies and partners. Strategies being led by other organizations cannot enter into a current work plan unless the lead organization specifically indicates so.
- When annual work plans are prepared by BCVT and the CCRD, it is hoped that these strategies will be incorporated where appropriate.

Strategies	Priority	Lead	Partners	Timelines		
				2006	2007	2008
Nature-based Tourism						
1. Meet with existing operators to identify opportunities, constraints and possible next steps for developing further guided and self-guided products.	Low	BCVT		▸	▸	▸
2. Investigate economic development opportunities relative to Management Plan review for Tweedsmuir Park (South).	High	CCRD BC Parks		▸	▸	▸
3. Assist with preparing a bear viewing strategy on the Atnarko River.	Low	BC Parks		▸		
4. Prepare a landscape plan that identifies locations and opportunities for new tourism activities.	Low	MAL		▸		
5. Promote an expanded selection of rental vehicles that will encourage more visitors to stay and experience some of the activities currently available.	Low	Operators		▸		
6. Create more opportunities for sport fishing, targeting the family market and general touring market that may not view fishing as a primary activity but would be interested in it as a secondary activity.	Medium	BCVT	CCRD		▸	

Strategies	Priority	Lead	Partners	Timelines		
				2006	2007	2008
Cultural & Heritage						
7. Assist the coordination of culturally themes tours.	Medium	BCVT		▸	▸	▸
8. Create a Day Pass that packages together several cultural attractions and encourages a full day activity for visitors.	Low	BCVT			▸	
Attractions Development						
9. Commence preparation for a waterfront/estuary plan	High	WEST CCRD		▸	▸	▸
10. Conduct a feasibility assessment of a First Crossing of North America Interpretive Centre.	High	BCVT CCRD BC Parks Parks Can		▸	▸	▸
Infrastructure						
11. Work on optimizing commercial usage of broadband services in the Valley and particularly to tourism operators.	Medium	CCRD			▸	▸
12. Continue to work with the CCRD and BCVT for the continuance and expansion of the Discovery Coast Passage service.	High	BCVT CCRD BCF	NN	▸	▸	▸
13. Provide planning and facilitation assistance to groups working on keeping trails and recreation sites available for public and visitor use.	High	Community Groups		▸	▸	▸
14. Determine the feasibility of an expanded transit service between Williams Lake and Bella Coola that could be marketed to visitors who arrive in the community without ground transportation (e.g. ferry and air passengers).	Medium	BCGH CCRD			▸	

Amenities and Services						
15. Develop a beautification plan for implementing public and private upgrades in the town.	High	DM	CCRD		▸	
16. Create more riverfront recreation access.	Medium	BCVT	CCRD MAL		▸	▸
17. Improve destination and directional signage.	High	BCVT		▸	▸	
18. Undertake the Bella Coola entrances project.	High	CCRD BCVT		▸	▸	
Partnerships						
19. Encourage more linkages among aboriginal and non-aboriginal tourism organizations that can lead to new partnerships for the implementation of this plan.	High	NFN	Community Groups	▸	▸	▸
20. Work with existing tour operators to determine the carrying capacity of the petroglyph tours and propose resource management options to ensure the feature is not degraded or damaged.	Medium	NN	BCVT		▸	

Key	BCF	BC Ferries	DM	Downtown Merchants
	BCGH	Bella Coola General Hospital	MAL	Ministry of Agriculture and Lands
	BCVT	Bella Coola Valley Tourism	NN	Nuxalk Nation
	CCRD	Central Coast Regional District	WEST	Waterfront Estuary Steering Committee

Appendix 1 - Situation Analysis

This appendix was presented as the initial report to launch the project in November 2005. It presents information on current tourism activity as measured by travel indicators, a profile of industry operators and a discussion of strengths, weaknesses and opportunities for market and product development in the Valley.

ACTIVITY ANALYSIS

Tourism is a major economic force within the Central Coast Regional District. Historically, most visitors have been attracted by sports fishing – both fresh water and salt water. A large number are destined for the outer coastal sport fishing lodges, while others enjoy the Dean River area, world renowned for its steelhead fishery. Most fishing activity is concentrated in the June to September period, with a short extended season into October for river Coho fishing.

The community hosts many privately-owned boats that travel the Central Coast each summer with as many as 400 vessels tying up marinas and wharves each year.[3]

The region also receives a significant number of visitors during the summer months that are travelling on circle tours. The Discovery Coast Passage and Highway 20 are an integral part of the province's signed Cariboo Coast highway tour that links the Central Coast, Cariboo-Chilcotin, Lower Mainland and Vancouver Island.[4] …

While the tourism season tends to be short, there are signs it is beginning to expand and the local industry is starting to diversify. In the past there was little or no winter tourism, but recently the opportunity to undertake extreme winter sports such as snowboarding at the Rainbow Range of Tweedsmuir Park have proven to be successful. In 2003, Bella Coola Heli-skiing and Dreamcatcher Heli-skiing were awarded heli-skiing tenures on Crown land in the area.

Tourism activity in the Valley has ebbed and flowed over the last decade in response to domestic and international events. The decline of local commercial fishing and forestry jobs has led to a population decline and negatively impacted some tourism operators (e.g. accommodation providers). Uncertainty over ferry services, a general lack of awareness of Bella Coola as a destination and poor road conditions on Highway 20 have, to a greater or lesser degree, affected travel markets and visitation in the Valley.

The following paragraphs provide a snapshot of local and regional tourism trends and some context for how this important sector contributes to the regional economy.

[3] Marlyn Chisholm and Associates, 2001.
[4] Lions Gate Consulting, 2005.

Economic dependencies

Tourism makes an important contribution to the economy of the Bella Coola Valley, directly employing more than six percent of the CCRD labour force and generating approximately five percent of total community income in 2001 (a decline from 10 percent in 1996). There has been significant change in the structure of the economy since 2001, and it is believed that with the continued decline of the commercial fishery and forestry activity, tourism has increased its share of total activity.

Highway traffic

Highway 20 is a 450 km, six-hour drive from Williams Lake through the Cariboo, Chilcotin and Coast Mountains into Bella Coola. When last counted in 1997, two-way vehicle traffic at the base of the Hill was about 30,000 annually, with over half of these in the 100-day summer period. Since that time, the Ministry of Transportation has not taken counts. In December, 2005, the CCRD board passed a resolution requesting the Ministry of Transportation to re-install the traffic counter at the base of the hill. Average annual and annual summer daily traffic in Anahim Lake has remained virtually unchanged since 1994.[5]

Ferry traffic

The Discovery Coast Passage Ferry is a critical transportation service that is responsible for handling much of the visitor traffic during the summer high season when the route is operational. The Discovery Coast is the southern section of the Inside Passage and stretches from Port Hardy to Bella Coola on the Central Coast, and includes the communities of, Bella Bella (McLoughlin Bay), Denny Island (Shearwater), Klemtu and Ocean Falls. Until the Discovery Passage service was launched in the summer of 1996, the Central Coast was also largely inaccessible by water.

The route is served by the *Queen of Chilliwack*, a former freight boat lacking in the type of amenities (e.g. sleeper accommodation) that would appeal to older travel markets (i.e. the type of market that appears to be attracted to Bella Coola Valley in increasing numbers). It is due for replacement but there are no firm timelines for this to happen.

Table 1: BC Ferries Route 40 Traffic Data, 2003-05

	Bus		Personal Vehicles		Total Vehicles		Total Passengers	
Bella Coola	Arr	Dep	Arr	Dep	Arr	Dep	Arr	Dep
2005	5	12	894	994	937	1068	2790	3116
2004	6	10	852	853	908	916	2733	2803
2003	11	7	860	891	912	917	2782	2969
Port Hardy								
2005	12	6	1194	1123	1325	1232	4204	3903
2004	10	6	1088	1111	1217	1235	4171	4106
2003	7	11	1077	1102	1236	1257	4281	4218

Source: BC Ferries.

[5] Ministry of Transportation, 2005.

As seen in Table 1, ferry traffic in and out of Bella Coola has been trending upward since 2003, despite the fact that traffic in and out of the main port of Port Hardy has declined slightly. Overall, there are more vehicles and passengers departing than arriving in Bella Coola.

Scheduled service for the 2005 season ran from June 8 to September 4, with arrival days on Monday, Wednesday and Thursday, departures on Monday, Wednesday and Friday. BC Ferries has announced its service will extend to September 29 for the 2006 season. In the winter, BC Ferries serves Central Coast communities such as Bella Bella, Ocean Falls and Klemtu as part of the Inland Passage Route 10 between Port Hardy and Prince Rupert. This service does not include Bella Coola.

The ferry service has become a critical element of the Valley's summer tourism season because of the circle tours and connections it allows between adjacent destinations. Cyclists, RVers, kayakers, backpackers and campers can experience some of the province's most beautiful terrain and choose from multiple options for departing from and arriving back in the Lower Mainland and southern Vancouver Island. A negative aspect of this service, however, are the arrival and departure times in Bella Coola (6:30 am and 7:00 am on Mondays and Wednesdays, respectively) which may be acting as a disincentive for travellers to remain in the community and explore more.

Other initiatives that would encourage longer stays and more spending include improved signage, coordinating store openings and ensuring travellers have more pre-arrival information.

Airport Traffic

Airport passenger traffic has climbed over the last three years and could rise by as much as nine percent in 2005 based on the first 10 months of performance. Rising passenger volumes are a sign of a recovering economy and improved conditions for travel into the region.

Table 2: Bella Coola Airport Passenger Volumes, 2003-2005

	J	F	M	A	M	J	J	A	S	O	N	D	TOTAL
2003	218	196	264	265	247	236	222	355	287	271	213	175	2,949
2004	199	209	270	271	223	237	256	333	263	320	243	215	3,039
2005	240	214	313	274	219	276	277	389	347	266	265 [e]	234 [e]	3,315 [e]

Source: Pacific Coastal Airlines
e estimated y Lions Gate Consulting Inc.

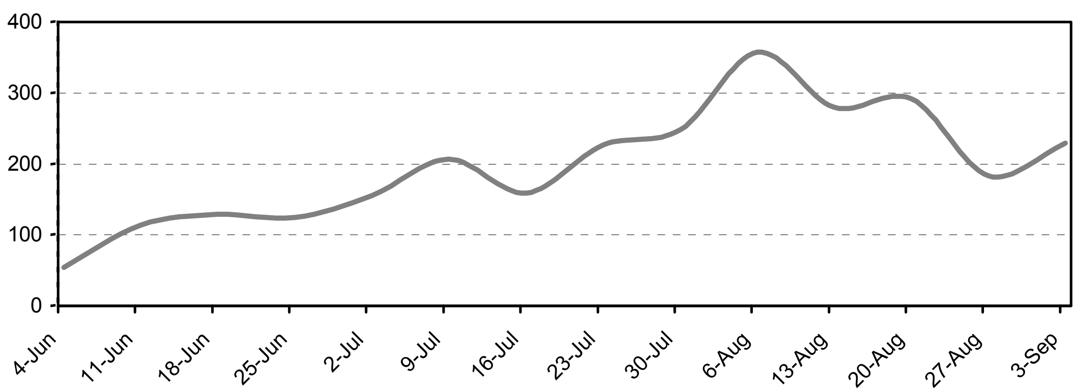
Visitor Information Booth

BCVT maintains a visitor information booth (VIB) at the Co-op store during the ferry season and coordinates a travel counsellor on the Discovery Coast Passage ferry.[6]

The VIB allows the Valley to provide a visitor information service to the degree it is able and has the resources. The visitor volumes do not qualify Bella Coola for a full-service or associate Visitor Information Centre (VIC) as sanctioned by Tourism BC; as a result the VIB is not permitted to use TBC's Visitor InfoNetwork corporate identification.

The VIB tends to attract some visitor types more than others (e.g. more international travellers and fewer BC residents). The data collected should not be viewed as representing the "average" traveller to the Bella Coola Valley, but it does provide some insights into traveller trends and behaviour.

Figure 3: Bella Coola Visitor Information Booth Visitors, 2005



Source: Bella Coola Valley Tourism

As seen in Figure 3, the peak period for visitors to the VIB is August, followed by July. Other VIB data shows the typical visitor to be middle-aged (between 36 to 65), just as likely to be single, couple or family, living in BC or Europe and staying less than two nights. The most popular information requests are for hiking trails, attractions such as museums and transportation.

[6] Outbound on Wednesdays inbound on Thursdays to/from Port Hardy.

Room Revenues

Room revenues are a general tourism indicator for as much as one third of total visitor expenditures can be for accommodation. As seen in Table 3, CCRD room revenues have more than tripled over the past fourteen years due to a combination of increased room inventory and price inflation. Over the nine-year period ending in 2004, revenues per room rose 80%. Most properties are believed to be in the Bella Coola Valley, although some remote coastal lodges (e.g. Namu) and at least one Bella Bella facility (Fisherman's Inn/Shearwater Marine) are included.

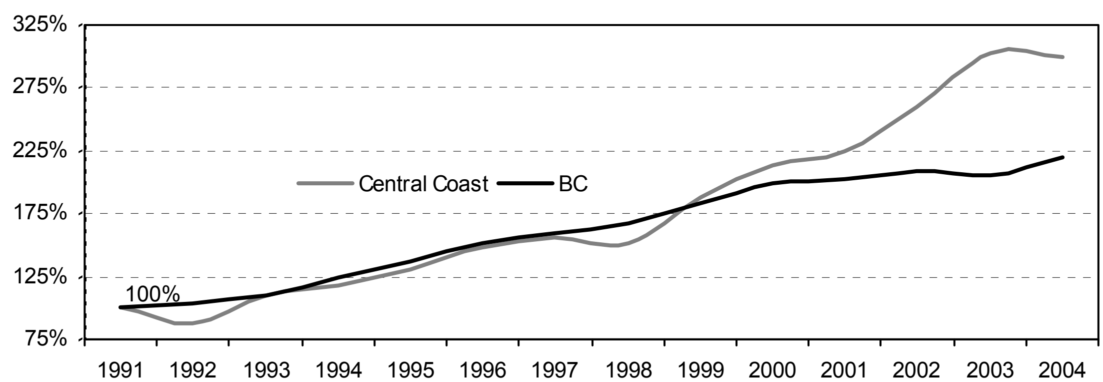
Table 3: Central Coast Annual Room Revenues, 1992-2004

	Number of Properties	Number of Rooms	($ 000's)	Revenue per Room
1992	-	-	$562	-
1993	-	-	$700	-
1994	-	-	$745	-
1995	12	172	$832	$4,837
1996	12	141	$946	$6,709
1997	11	139	$988	$7,108
1998	11	139	$959	$6,899
1999	14	173	$1,194	$6,902
2000	13	170	$1,357	$7,982
2001	13	170	$1,432	$8,424
2002	14	178	$1,644	$9,236
2003	17	211	$1,923	$9,114
2004	17	218	$1,897	$8,702

Source: BC STATS, BC Tourism Room Revenue, Annual Series.

The room revenue trends shown in Figure 4 illustrate that the CCRD has performed above the provincial benchmark since 1999, and despite cresting in 2003, may be able to regain some strength when the Discovery Passage ferry season is extended into the critical September period.

Figure 4: Change in Room Revenues for Central Coast and BC (1991 to 2004)



Source: BC STATS, BC Tourism Room Revenue, Annual Series.

Reviewing monthly revenues, it is clear that growth is occurring during the late-spring and summer season but that winter activity remains flat. Strong growth in the important shoulder seasons of May, June, and September is a good indication that some travel markets are not being deterred by the lack of ferry service.

Table 4: Room Revenues for Central Coast – Month By Month (1996 and 2004)

$000s	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
1996	21	30	38	53	63	127	153	172	110	104	39	43
2004	20	31	56	57	251	274	292	399	344	93	40	42
% Change	0%	0%	47%	8%	298%	116%	91%	132%	213%	-11%	0%	0%

Source: BC Stats

INDUSTRY PROFILE

The area has approximately 128 businesses that cater to tourists, directly or indirectly. The composition of the industry differs from most other areas of the province due to its orientation to nature-based products and activities. A list of operators appears in Table 5.

Table 5: Bella Coola Valley Tourism Operators

Operator Class	# Facilities/ Operators
Accommodations	26
Food & Beverage	4
Adventure Tourism & Recreation	31
Attractions	17
Events and Festivals	4
Other Tourism Services	11
Retail Services	25
Transportation	7
Travel Trade	3
Total Operators	128

Accommodation

There are 26 accommodation businesses in the Valley, including two hotels, two motels, four RV/camp operators, nine B&Bs (4 units and under), as well as Inns (7-10+ units) and a number of other businesses offering everything from resort accommodations (e.g. Tweedsmuir Lodge) to rustic cabins. There are an estimated 122 rooms, 69 campsites and 51 RV units available to visitors.

The composition of the accommodation sector could be characterized as rustic and generally in keeping with the Valley's historical ties to fishing and nature-based activities. Visitor markets and volumes have not justified the development of higher-end facilities, although growing awareness of the region may eventually lead to specialized destination resort and lodge development.

Strengths	Weaknesses
▪ Scenic locations ▪ Access to nature-based tourism products ▪ Adequate room supply ▪ Quality personal service	▪ No-vacancies during some ferry runs ▪ Lack of marine locations and access ▪ Limited telecommunications services ▪ Limited group travel capacity ▪ Limited conference capacity ▪ Aging facilities
Opportunities	**Threats**
▪ Crown land available for resort development ▪ High-end lodges ▪ Expanded First Nations' involvement ▪ Marine-based lodges	▪ Low profitability and liquidity ▪ Uncertainty over ferry services ▪ Larger resort operators may bypass local industry

Food & Beverage

There are four licensed food & beverage providers with approximately 350 seats, providing a mix of Asian and North American fare. The dining experiences are affordable and cater mainly to the budget-conscious visitor, as well as to residents. Facilities are clustered in Bella Coola and Hagensborg. The B&Bs, distributed along Highway 20 from Bella Coola to Stuie, also offer dining services to their guests. Licensed facilities are open year-round.

Strengths	Weaknesses
▪ Good selection for a small base ▪ Affordable ▪ Good quality	▪ Lack of seafood options ▪ Limited late-night hours of operation ▪ Lack of access to waterfront
Opportunities	**Threats**
▪ Waterfront restaurant ▪ High profile location for capturing ferry traffic ▪ Specialty shop (deli, coffee, local food products)	▪ Labour supply ▪ Service levels

Adventure & Recreation

The selection of adventure and nature-based products is limited, but growing. Hiking/backpacking, mountaineering, kayaking, canoeing, marine cruising, mountain biking, horseback riding, wildlife viewing, nature tours, cultural tours, air tours, heli-skiing, snowmobiling, photography and general sightseeing are all possible within very short distance. The inventory lists 31 adventure operators offering land-based and water-based activities, but the majority are part-time businesses, while others are based outside the region.

Strengths	Weaknesses
▪ Exceptional resource features ▪ Exceptional scenic features ▪ Convenient access to the backcountry ▪ Mix of marine and land based potential	▪ Lack of hospitality infrastructure ▪ High business turnover rates ▪ Visitor uncertainty over hours of operation and operator availability ▪ Visitor volumes still too low to justify full-time commitments by operators ▪ Lack of marine and river access ▪ Lack of marine products and experiences ▪ Deteriorating trail infrastructure ▪ Visitor perception of an "unsafe" mid and backcountry due to bear-human conflicts
Opportunities	**Threats**
▪ Product packaging with accommodation providers ▪ Available Crown tenure for most activities ▪ Heli activities ▪ Cat-skiing ▪ Develop more weather-independent adventure and recreational pursuits. ▪ Canoeing/kayaking the Bella Coola estuary	▪ Bear-human interactions and conflicts ▪ Costs of liability insurance are restricting operator capacity and business development

Transportation

Highway 20 and BC Ferries Route 40 are the two main modes of transportation in and out of the Valley.

Bella Coola Airport has a 4200 foot paved runway suitable for small private jets. Visual flight rules are in effect. Fuel and storage facilities are available.

Bella Coola has a public wharf[7] managed by the Bella Coola Harbour Authority, a public boat launch, a marina, a ro-ro[8] ferry dock and several charter operations. Between 40 and 50 boats tie up in the harbour each summer.[9] Many owners are believed to be resident in Williams Lake.

Pacific Coastal Airlines has regularly scheduled air service from Vancouver Airport's south terminal to Bella Coola. There is one scheduled flight per day from the late fall to mid-May, and two flights per day during the summer months. Bella Coola Air conducts amphibious service out of the Bella Coola airport, while West Coast Helicopters provides helicopter services. Air charter services from Williams Lake or Port Hardy to Bella Coola are available.

There is no public transit available, nor taxi or bus services. Rental vehicles are available for travellers at most accommodation providers who will arrange pick-up and drop-off terminal service.

Fixed-wing charter services are available from one company in Bella Coola serving tourism as well as other sectors of the economy.

Strengths	Weaknesses
▪ Only coastal community between Kitimat and Squamish with highway access ▪ Expanding BC Ferries service	▪ Limited capacity for tourism business ▪ Lack of taxi service ▪ Unreliable weather conditions creates uncertainty for air services ▪ No sleepers on the Queen of Chilliwack ▪ No bus service ▪ Condition of Highway 20
Opportunities	**Threats**
▪ Pocket and small vessel cruises ▪ Marine tours ▪ Land and air sightseeing tours ▪ Cooperation with Port Hardy and Williams Lake on year-round ferry service	▪ Continued uncertainty over BC Ferries service ▪ Decommissioning of logging roads

[7] Owned by Fisheries and Oceans Canada, Small Craft Harbours.
[8] Roll-on, roll-off.
[9] Marlyn Chisholm and Associates, 2001.

Tourism Services

There are 42 businesses listed in the inventory offering a wide variety of services from professional (photography, tourism information, business consulting) to retail (groceries, supplies, gifts, arts and crafts) to personal services (engine and boat repair).

There is one visitor information booth (VIB) in Bella Coola (Co-op Store) that operates during the ferry season. BCVT also sponsors a travel counsellor on some of the outbound and inbound ferries to assist travellers arrange their activities while in the Valley and plan for future trips. The VIB has a 1-800 number, which is marketed off-coast. The visitor volumes do not qualify Bella Coola for a full-service or associate Visitor Centre (VC) as sanctioned by Tourism BC.

Signage is a passive form of visitor servicing as it provides key directional and location information to travellers. Feedback obtained during the focus groups generally acknowledged a lack of suitable signage throughout the community and lost opportunities related to ferry traffic.

Visitor services in Williams Lake is thought to have a significant impact on traveller decisions regarding the use of Highway 20 and the experiences they can expect from a Chilcotin-Coast adventure. Historically, the Williams Lake VC has not actively marketed Highway 20 and has been criticized for misrepresenting road conditions. New opportunities exist with the opening of the new Discovery Centre with management by Williams Lake Central Cariboo Tourism.

Strengths	Weaknesses
▪ Wide variety of skills ▪ Small number of operators should allow for close cooperation	▪ Funding constraints for visitor services ▪ Limited operating season for the VIB ▪ Poor signage ▪ Low uptake of Superhost training
Opportunities	**Threats**
▪ Private sector cooperation on coordinated visitor service delivery ▪ Superhost training ▪ Extended VIB operating hours to match new ferry services	▪ Leakage of ferry travellers/spending ▪ Lack of awareness of the Valley

Tour/Travel Agencies (licensed)

There is one travel agency in Bella Coola and at least two provincially licensed inbound tour operators. These operators specialize in circle tours though they are not based locally.

Strengths	Weaknesses
▪ Available industry capacity for inbound tours	▪ Few inbound tour operators, and none specializing in foreign markets
Opportunities	**Threats**
▪ Packaging potential between adventure providers and accommodation facilities	

Festivals & Events

Cultural events and festivals are popular among travellers, with the majority having attended a cultural activity or event while on a trip in the past year. This translates into a huge North American market. The BC Visitor Study for the Cariboo Chilcotin Coast region showed that 11% of all visitors participated in a festival while in the area.

The Discovery Coast Music Festival, which showcases musical talent from around the world and features music, dancing, storytelling, a range of family activities, regional handmade crafts and food, has recently completed its seventh successful operating season. Each July long weekend Bella Coola welcomes horses, bulls and cowboys to the Bella Coola rodeo. The Fall Fair is primarily a local event but does attract visitors across the region. The Farmers' Market caters mainly to resident shoppers but is also of interest to visitors interested in an agri-tourism experience.

Almost all events & festivals take place between May and September with the majority occurring in the months of July and August. There are few facilities to support large group festivals, events or conferences.

Strengths	Weaknesses
▪ Strong core of volunteers	▪ Limited volunteer base ▪ All festivals occur in peak summer months
Opportunities	**Threats**
▪ Packaging of festivals with outdoor activities	▪ Volunteer burnout

Heritage, Arts/Culture & Attractions

The cultural heritage potential of the region is exceptional. The petroglyphs, pictographs, trade routes and cultural heritage of First Nations is virtually unexplored and uninterpreted. Alexander Mackenzie Provincial Marine Park, abandoned coastal communities and canneries and the heritage of the original Norwegian settlers have equally strong tourism potential. Some of these stories are exhibited in existing facilities, including the Bella Coola Valley Museum, Central Coast Archives and the Norwegian Heritage House. There are many artists and crafters in the community offering clothing carvings, Native art, pottery, giftware, jewellery, photography and paintings. In all, there are seventeen attractions listed in the inventory.

Strengths	Weaknesses
▪ Exceptional pre and post-contact heritage sites ▪ High marketability ▪ Capacity for further cultural interpretation ▪ Low impact, non-consumptive activity ▪ Cluster of artists and studios ▪ Thorsen Creek Petroglyphs ▪ Heritage classifications for Atnarko and Bella Coola rivers	▪ Overall lack of interpretive opportunities ▪ Little participation by First Nations ▪ Poor signage ▪ Support services are low ▪ Growing competition from neighbouring regions
Opportunities	**Threats**
▪ First Nations interpretation ▪ Mackenzie trail interpretation ▪ Education and interpretive centre ▪ Activity based experiences, spas, cuisine, learning adventures ▪ Cultural tours ▪ Art alliances ▪ Cooperative exhibition and retail facilities	▪ Concerns about carrying capacity on some sites

MARKET AND DEMAND ANALYSIS

Tourism operators in the Bella Coola Valley cater to international markets and, despite the small size of the regional tourism base, must understand and be prepared to respond to changing market and demand forces. The following paragraphs provide an overview of tourism markets, trends and demand conditions that are shaping global tourism now and in the future.

Global and North American Markets

Tourism is one of the world's largest industries and continues to grow. In 2005, total demand of US $6.2 trillion was responsible for generating 222 million jobs, US$918 billion in capital investment and 3.8% of global GDP.[10]

The outlook for international tourism remains positive, due to a combination of demographic, economic and industry developments. Current international tourist arrivals continue their post 9/11 recovery, registering a 5.9% increase in the first six months of 2005, following a bumper year in 2004. The long-term growth forecast for visitor travel is 4%.[11]

Leisure tourism has been stimulated by low fares for short-haul travel and by pent-up demand still being released for long-haul destinations. Business tourism has not performed as well but has recovered led by the meetings, incentives, conferences and exhibitions (MICE) sectors. Cruise tourism has also recorded above-average growth this year so far.[12]

International events such as the Indian Ocean seaquake and tsunami, recent bomb attacks in London, Turkey and Egypt, and hurricanes have somewhat undermined traveller confidence but so far the impact has been negligible outside of the affected areas.

Uncertainty over oil prices and airfares is prevalent, but competitive pressures have prevented airlines and tourism companies from passing on full energy price rises to consumers. In the long term, sustained high oil prices could slow economic growth and lead to declines in disposable income.[13]

North America has enjoyed 7% growth this year showing sustained recovery from the 2002-03 period when travel markets declined sharply. There appear to be relatively few limitations on tourism expansion in the near term, although exchange rates and gas prices have the potential to affect product pricing and final demand. Europe and Asia continue to be growth markets for Canada, while the Approved Destination Status agreement with China is likely to lead to a new influx of visitors from that country, though not for another year or two. [14]

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[10] WTTC, 2005. (World)
[11] Koumelis, October 6, 2005.
[12] Ibid.
[13] Ibid.
[14] Canadian Tourism Commission, 2005. "WTO Confirms Positive Results."

Travel intentions and bookings to Canada from the US, although recovering from their 2002 and 2003 slump, continue to fall below expectations due to a rising Canadian dollar, perceived barriers at the international border and escalating fuel prices. These factors are also largely responsible for Canada's continued decline among the WTO's top tourism destinations (by international receipts), falling to 12th position with US$ 12.84 billion.[15]

BC Markets

In 2004, 22.5 million vacationed in BC, including six million Americans, who represent close to three quarters of all overnight customs entries. BC´s share of total US visitor entries to Canada has grown substantially over the last four years. Another 600,000 international travellers visited, representing a 3.7 percent increase over 2003. Tourism was responsible for generating 266,000 jobs (almost one out of every eight jobs) and $9.5 billion in revenues in the province. With a GDP of $5.0 billion, this sector is bigger than mining, agriculture and fishing.[16]

Table 6: BC Overnight Visitor Volume and Revenue, 2001-04

	Overnight Visitor Revenue ($millions)	% change from previous year	Overnight visitor Volume (thousands)	% change from previous year
2004	2,602	3.0%	11,032	1.5%
2003	2,526	1.0%	10,869	0.0%
2002	2,501	2.0%	10,869	1.0%
2001	2,452	-1.0%	10,761	0.0%

Source: Tourism BC

Tourism BC has estimated increased visitation of 2.3% during 2005 to 23.0 million overnight visitors, generating $9.9 billion in revenue. Overseas markets will grow more rapidly than North American markets as overseas air seat capacity rises, travel from the Asia/Pacific region continues to rebound from the impact of Severe Acute Respiratory Syndrome (SARS) and as Europeans take advantage of the strengthened Euro. The growth in business travel during 2004 is expected to continue through 2005. Increased marketing funds will also be a positive factor, but should have more of an impact in 2006 and onwards.[17]

Growth in the domestic BC market during 2005 is expected to under-perform due to the lure of the weak American dollar, higher fuel prices which inhibited touring, and poor weather in late August and September. The perception of increased border security may mitigate the US effect. Some segments of the British Columbia market are sensitive to fuel prices, thus high gas prices will also act to moderate growth in resident travel. Growth in the important Canadian and US markets are projected to be 2% in 2005.

[15] Canadian Tourism Commission, 2005. Annual Report 2004 The Power of Attraction.
[16] COTA, 2005.
[17] Tourism British Columbia, 2005.

Alberta and Ontario will remain key markets. The negative impacts associated with the depreciating US dollar is expected to be minimal because American visitors to British Columbia tend to be older, wealthier and less price sensitive than American travellers in general. [18]

Cariboo-Chilcotin Coast Region

The most reliable visitor profile for the study area is from the *BC Visitor Study,* which unfortunately is now eight years old. There is a separate Cariboo-Chilcotin-Coast tourism region report providing details on visitor markets and their characteristics. The following paragraphs provide a synopsis of key results as they affect the market plan and strategy.

Visitor Volume and Value - 1.7 million visitors travelled to the Cariboo-Chilcotin-Coast region for a day or overnight trip in 1995/96, representing 6% of all BC visitors. Of these, 60% were BC residents and 40% non-residents. The total tourism revenue of $198 million represented 2% of all BC tourism revenue. Non-residents generated 33% of regional tourism revenue and residents 67%. Resident visitors spend an average of $40 per day and $128 per stay in the region, while non-residents spend $36 per day and $95 per stay.

Visitor Origins – Major geographic markets include the Greater Vancouver Regional District (22%), South BC (20%), Canada regional (12%), US regional (11%) and North BC (11%). Long haul markets, whether from the US or overseas, are a minor source of business for local industry.

Socio-demographics – The average Cariboo-Chilcotin-Coast region visitor was 44 years of age, had some post-secondary education, and was in the middle or upper income bracket. Non-resident visitors tended to be a bit older and more educated than resident visitors.

Average Length of Stay – Resident visitors spent an average of 3.6 days in the region, while non-resident visitors stayed 2.6 days.

Seasonality – The majority of BC residents travelling in the Cariboo-Chilcotin-Coast favour summer travel, but about one in five travel in the winter. Summer travel is even more popular among non-resident visitors.

Travel Party – Average party size among resident visitors was 3.2 people. For non-residents it was 2.3. Approximately three quarters of all visitors do not travel with children.

Trip Purpose – Visiting friends/relatives, outdoor/wilderness activities, general sightseeing and business were the top-ranked trip purposes.

Activities – Land-based outdoor activities, sightseeing, fishing, boating, photography and visiting historic sites were popular activities.

Sources of Information – Among resident visitors, most did not use any information sources either before or during their trip in BC. For those who did, the most popular sources of information were the recommendations of friends, relatives and others, followed by brochures/books.

[18] Ibid.

The Bella Coola Valley

In the summer of 2005, the University of Northern BC's Resource Recreation and Tourism Program conducted primary research on visitors to the Bella Coola Valley. The study consisted of a self-administered visitor survey (130 responses), focus groups (five groups) and in-depth interviews (40 responses). UNBC is still compiling the data and writing their analysis, which is tentatively scheduled for release in January, 2006.

We have had an opportunity to analyze some of the survey and focus group results and although detailed findings cannot be included in this report, we are able to draw some preliminary insights into traveller perceptions of the Bella Coola Valley.

- Respondents tended to be from older age groups, be relatively well educated and have above-average incomes. They travelled by personal motor vehicle and were on a circle tour that included the Discovery Passage ferry. US, Dutch and German visitors were well represented.
- The major activity represented was fishing.
- Respondents tended to use multiple accommodation types, for example mixing camping with a hotel/motel stay depending on weather conditions.
- Travellers staying at hotels and B&Bs were more interested in participating in cultural heritage activities, while RVers were more likely to pursue outdoor adventure.
- Bella Coola has a very strong sense of place for travellers, but beyond that they have few details or understanding about what they are going to experience.
- Travellers do not conduct much pre-planning before coming to Bella Coola.
- The distinction between Bella Coola and Hagensborg, especially in the BC Accommodation Guide, creates confusion for many travellers who do not understand the proximity of the two communities or the availability of other services and products.
- The lack of highway signage is creating safety concerns and in some cases fear among travellers about what to expect ahead. In particular, many west-bound travellers on Highway 20 have apparently little idea about the distances between services.
- The Queen of Chilliwack, despite its rustic condition, is an attraction for some travellers. Apparently, many are taking this route because they could not book passage on the Inland Passage.
- There is a very strong desire to experience native culture, but the vast majority of these are going unfulfilled.

Long-Term Demand Trends

Expansion of the older demographic – In Canada, by the year 2011, the age group of 44-64 year olds will number 10.2 million, up from 6.4 million today. Another group with significant potential during the next decade will be the 75+ age group. The same trends are affecting all industrialized countries. As the average age of the travelling public increases, the effects will be expressed through increased demand for safer, interpreted and package tourism products. As older travellers are also more likely to travel in groups, products and services catering to this segment are also expected to increase.

Activities that are the most physically demanding (including outdoor adventure, winter outdoors and alpine skiing) can be expected to grow at lower rates than the population of travellers as a whole. Conversely, those that require the lowest level of physical exertion (wine and culinary, aboriginal culture, heritage interpretation) can be expected to increase at higher rates than the total domestic tourism market.

Changing ethnic makeup – In North America, the proportion of immigrants is gradually shifting away from Europe to other regions, notably Asia and Latin America. While these travel markets may over time adopt the same tourist interests as those born in Canada, they also exhibit distinct travel behaviours and preferences. The Asian immigrant market in the Lower Mainland, for example, is believed to have a much lower propensity to travel within the province than native British Columbians. Communities will have to adapt both their marketing and product development in order to cater more to these markets.

Fundamental shift in visitor profile and behaviour – The travelling consumer is very different from any other time in history, seeking a much more rewarding experience with aspects of learning and education. The most successful businesses in the travel industry are those that are able to respond to this new demand through the use of technology, innovative marketing programs, better training of staff and by developing a closeness and understanding of their customers/guests. The differences in travel patterns in this new century will be related more to what consumers are seeking in a travel experience than to how they travel.

Emergence of new markets – Travel is no longer a novelty to the new tourist. Studies support what industry executives have been noticing for the last few years. People expect more out of their vacations than they used to and they are more adventuresome.

Surveys done by the Canadian Tourism Research Institute indicate a high degree of interest in getaway vacations, ecotourism, cultural tourism and combining a business trip with a pleasure trip. Specific market opportunities include:

- motor coach bookings on the rise
- incentive and conference planners
- interpretive and escorted tours
- resorts
- ecotourism

- fly/drive packages
- minority populations

Narrower decision-making window – The trend toward a more full-service experience where the visitor does not have to make a series of purchase decisions once they have arrived will impact the types of packaging and partnering initiatives that can be presented to tourists in order to strategically capture the market. As an example, there is a dramatic increase in short, getaway trips**,** which means that people are trying to pack more activities into more frequent trips of shorter duration. These travellers are more likely to have higher educations and incomes, and lack time. So convenience and quality is key. The idea of packaging hiking, cultural/heritage and candlelight dinners at the same time was unheard of a decade ago, but travellers are expecting this sort of value for the time and money they spend on their holidays.

Safety – The events of September 11, 2001 have had a significant impact on British Columbia's tourism industry, evidenced by a drop in visitation and revenue for the first time in a decade. But the decline has been among overseas visitors, while US visits have continued to increase. Concerns about air travel safety are expected to contribute to sustained demand for North American holidays and motor coach touring among domestic markets.

Technology - Technological innovation is impacting the tourism industry in several ways: access/transportation, comfort, safety, communication, and information. It has lowered the risk associated with many outdoor activities in particular, enhancing participation and opening up new opportunities for business and market development.

Future Demand

The World Tourism Organization has forecast average annual growth of 3.8% in North American tourism through to 2020 based on an estimate of 282 million tourist arrivals. While this will not match overall world-wide growth of 4.1%, North America will manage to maintain roughly one-fifth of total world tourist arrivals. The underlying structural trends in which periods of faster and slower growth alternate is not expected to change in the future.[19]

The Canadian tourism industry is expected to far better than the North American average. It is forecast to generate $223 billion of economic activity in 2005, growing to $413 billion by 2015. Tourism Demand is expected to grow by 4.4% per annum, in real terms, between 2006 and 2015. This will lead to an estimated 2.5 million jobs (1 in every 7.2 jobs versus 1 in 8 jobs today), $162 billion in total exports (14.6% of total Canadian exports), $38 billion in total investment (8% of total), and $18 billion in government spending (4.3% of total) by 2015. [20] By almost all measures, tourism will increase its share of economic activity over the next ten years in Canada.

[19] WTO, 2005.
[20] WTTC, 2005. (Canada)

Over the long-term, the BC industry appears to have excellent growth prospects. It remains the second leading tourism destination in Canada, after Ontario, and leads the nation in certain categories, including international tourist visits. The Canadian Tourism Commission has projected that six million Canadians will be making an overnight trip in British Columbia by 2026 (versus four million in 2000). The rate of growth will be higher than Canadian population growth, higher than growth in other provinces and higher than the expected growth in Canadians travelling to all destinations.[21] The CTC has pointed out that British Columbians travelling within this province British Columbia continue to be a critical market. Ontario and Alberta are the other two provinces that will provide the bulk of domestic travel.

[21] Research Resolutions & Consulting Ltd., August, 2004.

CONCLUSIONS

Our conclusions, based on the preceding analysis of industry, markets, and trends are as follows:

1. The Bella Coola Valley has an exceptional mix of natural, heritage and cultural resources that have excellent potential for further development. However, many of these features have yet to be turned into market-ready products and services that are matched and delivered to current visitors. This includes activities related to Tweedsmuir Provincial Park.
2. One of the attractions of the Valley is its low crime rate and the high level of personal safety it can offer visitors. These attributes could be incorporated into marketing messages, particularly those aimed at older age groups, for whom the concept of safety is an important part of the travel experience.
3. The operator base is relatively small and limited in its capacity to respond to new market opportunities because of a combination of a short peak travel season, short visitor stays and low visitor spending. These factors limit business profitability and restricts the flow of new investment capital into the industry. Small operators must be willing to bear above-average business and financial risk if they wish to create or expand new products for market.
4. In spite of these risks, new investment activity is occurring, mostly for the expansion of outdoor adventure products, particularly in heli-skiing. One of the trade-offs that may emerge in the future is the in-flow of major investment capital for backcountry resort developments that are independent of the local tourism base. The community may end up benefiting from employment generated from these projects, but if operators bypass local businesses for labour, supplies and services, then the majority of impacts will have been lost.
5. The region's tourism infrastructure ranges from severely lacking to suitable, with notable areas of need being food and beverage, signage, marine access and backcountry access. The overall lack of infrastructure has two separate but compounding effects on visitation: it limits the activities available to self-guided and independent travellers, and it significantly restricts the investment of private operator capital in complementary products and services. The net result is limitations on the types of visitors that can be attracted, the length of time they will stay and the amount of money they will spend.
6. The tourism industry is highly dependent on BC Ferries services and reliable access along Highway 20. Without these, the community becomes an effective dead-end without the capability of marketing circle routes and tours and loses much of its appeal for visitors seeking the combined water-land experience of the coast.
7. Activity measures such as room revenues, ferry traffic, road traffic and airport traffic show regional tourism to be on an uptrend, but it is unclear as to why visitation levels are not higher in the Valley. The BCV is currently accessible to approximately 1.7 million visitors who come to the Cariboo Chilcotin Coast region every year. Many of these travellers are bound for Alaska but there is clearly potential for Highway 20 communities to grab a larger share of this market. Many visitor information requests made at the Williams Lake VC are for Highway 20.

8. National and international tourism trends show that visitor markets and the industry are evolving rapidly. Visitor motives for travel are becoming more attraction-oriented and fundamentally different from the socially-oriented free independent traveller of the past. Visitors are also seeking more convenience, more learning and educational experiences and safer outdoor recreation activities. All these trends point to the need in the BCV for more advanced and coordinated product development.
9. The long-term outlook for tourism in BC and the region is very positive and will, over time, lead to new investment and product/service development. In the short-term, the best opportunities are in the regional and short-haul markets, including US touring travellers. The BCV has convenient access to some outstanding nature-based tourism resources (e.g. fishing, mountains, rivers) that have strong appeal for these markets. However, the visitors most likely to be attracted to the region (older-aged, wealthy touring travellers) are looking for amenities and soft-adventures that are either not currently available or in short supply in the Valley. Operators can respond to these gaps by pursuing opportunities for packaging or investing more capital in new development. Government can stimulate and complement private sector spending by making strategic investments in infrastructure, particularly in transportation and community-based attractions such as interpretive facilities. Although there a few First Nations business people involved in tourism in the region, a greater level of participation by the Nuxalk community is essential for optimizing the Valley's exceptional potential in heritage/cultural interpretation.

Appendix 2 – List of Contacts

Contact Name	Business/Organization	Contact Name	Business/Organization
David Anderson	CCRD - EDO	**Rene Morton**	Museum
Jim Anderson	Pacific Coastal Airlines	**Jim Newkirk**	Tallheo Cannery
Doug Baker	Doug On The Trail	**Kathy Nylen**	Sinclair House
Steve Battensby	White Surf Ocean Adventures	**Kevin O'Neill**	CCRD
Mark Bradt	Petroglyph Gallery	**Karl Osmers**	Gnomes Home Campgrounds & RV Site
Charles Bryfogle	BC Fall Fair	**Ed Robson**	Nuxalk Nation - EDO
Jason Bowman	BC Ferries, Mgr. Terminal Operations, North Coast	**Ulli Richards**	BCVT Treasurer
Kim Burgoyne	CCCTA	**Wendy Rockafellow**	Dreamcatcher Heliskiing
Lori Campbell	BCVT, VIC	**Brian Roe**	The Bay Motor Hotel
Sarah Curtiss	Pacific Coastal Airlines	**Heather Ross**	BCV Rodeo
Cathy Denham	CFDC Port Hardy / North Island	**Joan Sawicki**	Waterfront and Estuary Committee
Lorna Dishkin	Bella Coola Archives	**Joan Saugstad**	Valley Artist
Terry Dong	BCV Inn	**Wayne Sissons**	Bella Coola Air
Ken Dunsworth	BC Env	**Jim Smart**	Bella Coola's Eagle Lodge
Hans Granander	BC Resource Society	**Rosemary Smart**	Bella Coola's Eagle Lodge
Anne Hardy	University of Northern BC	**Beat Steiner**	Bella Coola Heli-Sports
Lizabeth Hall	Nuxalk	**Lucille Thompson**	Valley Artist
Lorant Hegedus	Salt Chuck Charters	**Dianne Tuck**	Williams Lake & District Credit Union
Tracy Hegedus	Salt Chuck Charters	**Monica Tutt**	Discovery Coast Music Festival
Alan Hobler	BC Parks	**Sundance Topham**	CCCTA
Christine Hyde	Tweedsmuir Travel	**Doug Treleaven**	BC Ferries
Donn Irwin	Western Chilcotin Tourism Association	**Judy Ratcliff**	Valley Artist
Fraser Koroluk	Brockton Place Guest House & Inn	**Rick Ratcliff**	Rick's Re: Cycling
Jones Leung	Palm Garden Restaurant	**Laurie Walters**	CCCTA
Sandie MacLaurin	DFO	**Steve Waugh**	Suntree Guest Cottage
Joanne McLeod	BC Parks	**Cheryl Waugh**	Suntree Guest Cottage
Kathy Moore	Moore's Organic Market & Nursery	**Mike Wigle**	Jumping Mouse Studio
John Morton	Kopas Store	**Jill Zimonick**	Williams Lake, Central Cariboo Tourism