

Community Tourism Foundations® Program

Summary Report - Situation Analysis Initial Draft West Chilcotin, November 2006

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West Chilcotin Tourism Association website

<http://www.visitthewestchilcotin.com/communitydevelopment/>

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This initial draft of the situation analysis for the West Chilcotin is to provide an overview of the current situation as it pertains to the planning session to be held on November 28, 2006 with the tourism community. The final report will be completed after the planning session.

Introduction and Methodology

This situation analysis document has been created through the *Community Tourism Foundations*® development program in partnership with the communities of Nimpo, Anahim and Tatla Lakes. The outcome of this process is the production of a tourism plan that will address both tourism development and marketing development, which identifies objectives and strategies for the next three to five years. An annual action plan will be required to guide the activities that will be undertaken to implement the tourism plan.

Tourism planning and development is a continuum, as one milestone is achieved there is typically another to strive for as the community moves through the destination lifecycle which includes the early stages of development planning (vision and plan), growth (product development), maturity (products from the vision are achieved and the destination is being utilized by the target markets), decline or rejuvenation (the destination requires re-development or it will decline losing market share and economic impact). The success of the West Chilcotin as a visitor destination will be dependent on the recognition that it takes a community to deliver a positive visitor experience, as each component is inter-dependent.

To understand the current situation for tourism in the West Chilcotin a literature review of existing reports and plans, websites and current marketing materials was undertaken. The Tourism BC facilitator visited the area and met with many tourism operators in all three communities and toured their operations. A key report that still has relevance to tourism development planning for the region is Chilcotin Tourism Study produced in 2001. Sections from that document have been used for this situation analysis. Current tourism initiatives in the region include the Cariboo Chilcotin Beetle Action Coalition's Tourism Sector Strategy and the Flex-Funds program of the Cariboo Chilcotin Coast Tourism Association. Information from the tourism study currently in development by Miriam Schilling has also been utilized for this report.

The study area for the purposes of marketing and promoting the West Chilcotin include Area J of the Cariboo Regional District. The West Chilcotin is experiencing a shift in visitor demands and some businesses are losing markets that were once their main stay. Some properties have anticipated the trend and are renovating their properties (or building additions) to meet the changing needs of consumers, in addition there is a shift in their markets (e.g. sightseeing and touring vs. destination fishing).

The extended ferry service of the Coast Discovery route to the end of September has provided a "test market" for demand for travel past the Labour Day long-weekend. BC Ferries intended to expand the service prior to the sinking of the *Queen of the North* on the Inside Passage route, however demand exceeded capacity of the replacement vessel so the service on the Discovery route was extended to end of September. Local operators could benefit from a longer season, BC Ferries have indicated they will test market the extended route for 2007 and promotion of the route will commence January 2007 with marketing partners.

Promoting the Chilcotin is typically done through each individual business; cooperative presence is through the Cariboo Chilcotin Tourism Association. A website is maintained by the WCTA www.visitthewestchilcotin.com. A local business hosts the www.resortsbcc.com where more information can be found, this site provides a good overview of the West Chilcotin. The Chilcotin uses artwork in an outline form that represents a mountain range with the tag line *Timeless, Intimate, Beautiful*. A researched based branding process has not been undertaken, nor is there a positioning statement for the area although Nimpo Lake is known as "Floatplane Capital of BC" due to the number of planes that use this lake as a launching off point for various destinations in the region.

The group has expressed an interest in a visitor services program, which may include a dedicated kiosk, (manned or unmanned) and an industry development program that would inform and educate operators in the area to be travel ambassadors, which could include retail and services providers.

Beautification and signage projects have been identified as a priority for the area and projects are underway.

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The West Chilcotin has a high percentage of repeat customers; therefore the importance of consistently delivering those experiences is as important as attracting new visitors.

Tourism in BC

Tourism is an important industry in British Columbia, worth \$9.5 billion in visitor revenue in 2004 and contributing \$1 billion to the provincial treasury. Tourism GDP was just over \$5.3 billion in 2004, based on a 1997 constant dollar. The increase in tourism GDP outpaced the growth of the provincial economy as a whole over the previous decade. Tourism employs about 118K British Columbians.¹

Tourism is a worldwide industry and British Columbia is a small player. Due to worldwide competition, the dependence on personal disposable income, consumer confidence, and world events that are not within anyone's control (such as wars and disease), international tourism growth is volatile in the short term. However, as experienced in the recovery in tourism despite the Iraq war, SARS (Severe Acute Respiratory Syndrome), and a weak U.S. economy, tourism has proven to be resilient and is expected to grow at a healthy rate over the long term. For communities in BC, domestic visitors are likely to show less volatility and would be expected to make up the vast majority of visitors.

Tourism to British Columbia has experienced steady growth but with fluctuations starting in 2001 due to world events. The outlook is positive, with healthy growth rates (around 4%) forecast, assuming no unfavourable events. Canadian and American visitors made up 92% of visits to BC in 2004, with BC residents making up 49% of visits in BC.

BC residents are the least volatile in travel patterns without the degree of fluctuation experienced from international visitation. They are an important market for BC communities as they travel in BC more often (good source of repeat visitation), explore areas of the province beyond Vancouver / Victoria / Whistler, have a higher propensity to travel in BC year round, and are more accepting of varying qualities of facilities, amenities, and customer service levels. BC residents represent the first wave of visitors to allow a community to build its tourism business to become more export ready.

International visitors spend more than BC residents but they have correspondingly higher standards, tending to limit their experiences to those that are export ready. While the international markets are attractive, negative experiences have far reaching consequences so they should be targeted only when the destination has high quality facilities, amenities, and customer service levels.

Canadian and American travellers present the largest potential volume of visitors to BC communities. The U.S. market is expected to continue to be an important international market but the number of visitors is not expected to grow in the short term, with challenges such as new passport requirements, border and security issues, and the lower spending power of the U.S. dollar in Canada. Leisure travel in Canada and the U.S. makes up a larger number of trips and is growing faster than business travel. Baby boomers continue to be the largest demographic segment, with the baby bust/Generation X the second largest segment that is seeing the highest growth rates. Having an Internet presence is important as the majority of American and Canadian travellers use the Internet for vacation planning and about half book online.

Within the Canadian market, BC residents are the single largest source of visitors to BC (50%), followed by regional markets, especially Alberta. Within the long-haul Canada markets, Ontario is the single largest source of visitors. Within the U.S. market, Washington and California are the largest American source of visitors to BC. In the Asia Pacific market, Japan continues to be the largest market, followed by Australia/New Zealand. Visitors from China made up less than 1% of the market in 2004 but is expected to grow significantly once (ADS) Approved Destination Status is approved for Canada. In Europe, the United Kingdom continues to be the largest market, followed by Germany.

For communities in BC, international visitors may not make up a significant proportion of visitation. Domestic visitation, particularly from BC residents, do not tend to increase or decrease as significantly due to world events.

¹ Tourism BC

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BC residents and other Canadians tend to be more reliable visitors to BC communities and tend to make up the vast majority of visitors in BC.

West Chilcotin Tourism Product Analysis and Market Match

The appeal for West Chilcotin can be characterized by the remote wilderness with accessible backcountry experiences including lake fishing with access to private lakes via floatplane services. Long known as a fishing destination changing market conditions result in a loss of the old time fisherman who's demographic is aging coupled with new market demands for broader experiences including outdoor recreational pursuits and touring.

Nimpo Lake is known as floatplane capital of BC, it is the busiest fly-out centre in the interior for aerial sightseeing tours and fishing fly-in trips into the pristine and remote wilderness lakes and rivers of the Chilcotin. Tatla Lake, near the western edge of the Chilcotin Plateau, is a helicopter tour access point for several wilderness destinations, including the Homathko Ice Field and Mt. Waddington, the Coast Mountains' highest peak, at 4,016 metres. The Native community of Anahim Lake is a base from which to embark on horseback or hiking trips into the surrounding Chilcotin wilderness of the Itcha Mountains, the Ilgachuz Mountains, and the multi-hued Rainbow Mountains. The largest community in the West Chilcotin, Anahim Lake is also the eastern gateway to the southern portion of Tweedsmuir Provincial Park home of phenomenal wilderness recreation. Anahim Lake is the site of a long-established Chilcotin settlement, which was expanded in the 1940s and the 1950s by Carrier Native peoples who had gradually left their remote villages to move to Anahim Lake. To the north lies the Itcha/Ilgachuz Park with BC's largest herd of mountain caribou and the Oosta-Blackwater region where Alexander Mackenzie traveled in 1793. Tweedsmuir Provincial Park is famous for Lonesome Lake and Hunlen Falls. Floatplane access to the Turner Lake chain can be found at Nimpo Lake.

Wilderness adventure travel and recreation dominate the West Chilcotin product profile with the majority being outdoor wilderness recreation during the peak summer season and some activities during the shoulder season. Winter activities are available. Activities include air flight sightseeing with key destinations including the Rainbow Mountains, Hunlen Falls and Monarch Ice fields. Activities include air tours (floatplane and helicopter), bird watching, canoeing, cross-country skiing, fly in canoes / Turner Lake chain, fly in fishing, fly in hiking, hiking, horseback riding / trekking, hunting, ice-fishing, kayaking, lake fishing, mountain biking, nature study/ botanical tours, photography, river-rafting, snowboarding, snowmobiling, snowshoeing, stream fishing, river-rafting, wildlife viewing and wind surfing. Although not an activity, relaxation is a key motivator for travel to the West Chilcotin.

There is not adequate primary research to effectively profile the visitors to the West Chilcotin and Highway 20, especially as it relates to the travel motivations and habits of the touring market a key potential for the region. Through the *Community Tourism Foundations* project a visitor research program will be identified.

Types of visitors to the West Chilcotin are primarily leisure travellers, free independent travellers (FIT) and small groups, visiting friends and relatives, touring, tourists in transit and some business travellers. Visitor characteristic profiles that match the product offerings of the West Chilcotin include Outdoor Adventurers, Wilderness Resort Visitors and Winter Outdoor Tourists. Information about the Sport fishing and RV markets are summarized from existing sources. Research sources for visitor profiles to the West Chilcotin are limited, however a research project is underway in the West Chilcotin by Miriam Schilling, a student of the international degree course of Applied Leisure Studies, University of Applied Sciences Bremen, Germany. The research was conducted in the summer of 2006 throughout the West Chilcotin. The full report is estimated to be available by January 2007. The following summarizes key findings from the initial report that surveyed operators and a subsequent report (currently in production) that surveyed visitors.

Key visitor origin and age ranges to the West Chilcotin include:

- BC, US, Europe (Germany, Switzerland, Austria) and Canada.
- Key demographics are 31-50 years olds, followed by 51-64 year olds.

Guest Information key findings are summarized as follows:

- Visitor origin is approximately 1/3 US and 1/3 Canada/BC, followed by the German speaking market (Germany, Austria, Switzerland), to a smaller degree the rest of Canada, other countries in Europe and the British Isles with few from Australia/Asia

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- The majority of guests to the region are between 31-50 years old (35%), 51-64 years (31%) followed by 19-30 and over 65 both 14%, 11-18 years 4% and under 10, 2%
- Operators indicated guests find out about them primarily as repeat customers (42%), advertising (primarily the internet), word of mouth (25%) with only 7% driving by (tourists in transit)
- Operators indicated the majority of guests stay at one location 2-3 nights (31%), 1-2 weeks (28%), 4-6 nights (24%), 1 night (14%), longer than 2 weeks (3%)
- Operators indicated 46% of their visitors spent a portion of their holiday with them followed by 42% spent the major portion of their holiday with them and 12% were driving through
- Operators indicated their guests mode of travel was 70% by vehicle of which 50% was their own, 18% rental and 2% RV. Air access made up 30% of which fixed wheel plane is 16% and 14% floatplane
- Usage by their guests of the Discovery Coast passage route of BC Ferries was estimated by operators to be between 0-2 and 80% with the mean at 20%
- Group composition of travellers were 31% couples, followed by 25% families and 19% for both individuals and families, with 6% as group travel
- While the majority of businesses were for leisure purposes, the mean for business travel was 9.83%, responses ranged from 0-2 to 80%
- Operators indicated how much on average their guests spend at their location per day, based on Canadian dollars 36% spent between \$50 and \$100 as well as \$100 to \$200 followed by 24% over \$200 and 4% under \$50
- Operators ranked the motivation of their guests to come to the West Chilcotin for the wilderness, scenery, fishing, wildlife, remoteness, adventure wilderness activities, hospitality, mountains followed equally by the attachment to place, relaxation, clean water and air, solitude and Discovery Coast Route.
- Guests comments are favourable to the scenic beauty of the area and negative look of the highway 20 corridor

Conclusions of the initial study dated June 2006 indicate the majority of visitors to the West Chilcotin are nature based, the operators experience many repeat customers, the West Chilcotin is under performing in group travel compared to the rest of the province, peak season is averaging 70% occupancy for most businesses, only seven businesses operate in the winter, developing winter product and packaging should be a consideration such as First Nations culture and pioneer history. The Asian market has yet to be tapped for the region.

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Preliminary results of the visitor survey indicate:

- Visitor's stayed 6 days in the West Chilcotin with an average length of trip 16.42 days
- Visitor's spent an average of 3. nights at one particular accommodation provider
- Visitor's found out about the West Chilcotin primarily through friends/relatives 32%, former visit 31%, internet 18%
- Visitor's planned their trip almost 14 weeks in advance
- The majority of visitors 55% had not been to the area before, while 45% had on multiple occasions
- Primary motivator for travel and most important reason to travel to the area was outdoor wilderness activities, followed by sightseeing and relaxing
- When asked multiple choices for the kind of activities the top six ranked in order of responses were relaxation followed by wildlife viewing, fishing, hiking, photography
- Choosing the two top activities most important to visitors were relaxation and fishing
- Composition of travellers were family followed by friends
- Type of accommodation used was resort and lodges followed by motel, Bed & Breakfast, campers
- The majority of visitors used their own vehicles for transportation into the region followed by rental vehicle
- The amount of kilometres driven per day 319
- On average visitors spent \$76 per day (excluding travel cost to the region)
- The majority of visitors were planning to return to the region 54%, followed by 27% probably, 11.6% not sure and 7% no
- Eight-nine percent would recommend the West Chilcotin
- Visitors commented on the need for better signage
- Dislikes included mosquitoes, trees killed by pine beetle, rough gravel roads
- Likes included the scenery, people, peace and quiet, nature, fishing, and wildlife
- Age of respondents were 40-49 followed by 50-59 and 60-69
- The marital status of visitors were married, followed by single
- Gender 51% male, 49% female
- The majority 73% were educated with College or University degree
- Net household income \$60,000-\$80,000 followed by over \$100,000, then \$80,000 up to \$100,000
- Most visitors spoke English followed by German, then French
- Visitor origin was BC 36%, Germany 18%, Other Canada 15%, Other Europe 12%, USA 11%, Asia and Australia 2% each and Other 2%