

2.0 Introduction

2.1 Purpose

The purpose of this study is to prepare a Tourism Opportunity Strategy (TOS) for the Columbia Forest District. The work is an extension of the Forest Recreation and Tourism Opportunity Studies (FRTOS) and Forest Tourism Opportunity Studies (FTOS) developed by the Ministry of Small Business, Tourism and Culture (MSBTC) over the past few years in support of community-based tourism development. This study will enable better operational management of tourism and recreation resources. In addition, it will support integrated resource and community planning targeted toward a future legacy of economic, social and environmental sustainability for district residents.

2.2 Scope of the Study

The study examines tourism trends and market opportunities as well as analyzes local resource assets and constraints to development. Key opportunities and development issues are identified for tourism product and activity development in the study area. Development recommendations are provided for communities and entrepreneurs to consider in the development and promotion of the area's backcountry tourism opportunities. The information provided by this study provides a foundation for future government, community and business planning around economically, socially and environmentally sustainable tourism opportunities in the Columbia Forest District.

2.3 Project Methodology

2.3.1 Project Initiation

Upon notification of contract award, an initial meeting in Revelstoke was held with the contract manager for MSBTC, Mr. Kevin Weaver, to initiate the project. The purpose of the meeting was to:

- Verify the contractual and administrative aspects of the project, including refinement of the tasks, identification of priorities, scheduling, payment schedules, etc.
- Discuss strategies for completion of the project.
- Discuss roles and responsibilities of the Advisory Committee (AC).
- Discuss the list of key operators, agencies and user group representatives for participation on the AC.

- Transfer all available TRI, FRI and resource digital map layers as well as previous operator survey data from MSBTC to the consultant team
- Develop an initial sense of issues and constraints that may arise during the project.

2.3.2 Preliminary Information Collection

A thorough review of background materials, reports, statistical information, feasibility assessments, business plans, maps, data (paper and digital), and other useful information from BC Government departments, ministries and agencies, and other pertinent sources was completed. (Refer to [Appendix 6 – Bibliography](#)).

2.3.3 Import Existing Digital Data

All existing data sets were imported, and a working base map was developed. Provincial Terrain Resource Information Mapping (TRIM) files make up the source for the base map. Existing tourism use (tourism resource inventory) and recreation use data (forest service sites, forest recreation inventory, recreation trails) from MSBTC and MoF were imported including all road, river, lake, and other features such as contours and protected areas (parks). The base map is complete, seamless and meets standard MELP projection parameters.

2.3.4 Operator / User Group Survey - Updating TRI database

In order to update the existing Tourism Resource Inventory (TRI), tourism operators and significant recreational user groups in the District were identified. A survey questionnaire based on previous TOS surveys was developed (refer to [Appendix 1](#) for a copy of the operator survey). The survey had two components: collection of existing information, and collection of information required for the strengths, weaknesses, opportunities, and threats (SWOT) analysis and community tourism development profiles. A base map accompanied each survey to capture spatial attribute data. The survey was sent to 193 businesses, organizations and user groups (refer to [Appendix 2](#) for a complete list of businesses and agencies the survey was sent to). Surveys were sent to several offices of some government organizations and large businesses, so the list represents approximately 160 operators, agencies and user groups in the district. There were 41 respondents, giving a return rate of 26%. Based on input from the surveys, we updated the TRI database for the Columbia Forest District. The TRI database is a separate product from this report.

2.3.5 Project Advisory Committee

A Project Advisory Committee was established to guide the study and provide an opportunity for community involvement in the TOS. This involvement is critical because stakeholders in the district are the best sources of information, community buy-in is essential to the success of the final product, and the community is the ultimate user of the final product.

The project Advisory Committee met on November 20 in Revelstoke to discuss overall direction for the study and to decide on the activities that would be the focus of the project. The Tourism Opportunity Strategy involves the selection of ten ecotourism/adventure travel activities. The intent is to review these ten activities at the district level, to determine ways to enhance existing tourism businesses, or identify new potential opportunities within the district.

The ten activities selected were:

Snowmobiling	Mountaineering
Ski Touring	Rockclimbing
Cross-country Skiing	Fishing
Mountain Biking	Hiking
Canoeing/Kayaking	Natural & Cultural Features Viewing

2.3.6 Workshops

To assist in gathering information, workshops were held in Revelstoke and Golden in December 2000. A diverse range of business owners, guides, tour operators, economic and tourism agency representatives, and members of recreation user groups attended the workshops. The primary goal of each workshop was to *brain storm* with these knowledgeable persons to identify a number of potential *products* (tourism business opportunities) for each activity that have potential for development in the Columbia District (refer to [Appendix 3](#) for the **Workshop Results**).

Following the workshops and after discussions with several of the advisory committee members, stakeholders, and the consulting team, it became obvious that the focus of the project needed to be adjusted somewhat. While these adjustments were not dramatic, they reflect somewhat of a philosophical change. Two particular changes are noteworthy:

- 1) The emphasis on specific "product" identification and detailed inventory updating was reduced with greater emphasis being placed on market / resource / issue analysis related to the broader activities. Originally, the study was mandated to identify individual products such as guided tours, equipment rentals, etc., for more detailed research and opportunity analysis. Based on the feedback

received it was felt that additional research efforts would be better spent if focused on the broader activities themselves. Mapping products shifted away from raw tourism product “capability” mapping to broad “opportunity” mapping.

2) Recognizing that many tourism needs and resultant opportunities transcend any single activity, it was felt that it would be useful to look at some of the systemic issues that hinder existing operators let alone prevent development of new opportunities.

2.3.7 Preliminary Research and SWOC Analysis of Tourism Opportunities

The study team undertook a detailed background contextual research and analysis on key issues affecting tourism development in the Columbia Forest District. This research included:

- International, national and provincial tourism market information.
- Provincial and regional tourism development strategies (especially trend analysis).
- Local tourism and other economic development strategies.
- Land and resource management planning and development activities in the Columbia Forest District and their impacts on tourism development.

A Strengths-Weaknesses-Opportunities-Challenges (SWOC) Analysis was conducted comprised of the following steps:

- Identification of the strengths of the region for development of particular tourism products.
- Identification of the weaknesses in the region for development of particular tourism products, indicating whether each weakness is correctable or intractable. Three main areas of weakness were explored: incompatibility with existing use; lack of community support; and lack of infrastructure (insufficient facilities).
- Identification of the opportunities in the region for development of particular tourism products. Rank the opportunities by filtering them through a matrix, plotting market attractiveness/growth potential on one dimension against competitiveness requirements on the other.
- Identification of the threats in the region for development of particular tourism products. Threats to resource-based tourism typically relate to management of the land and resources. Often the operator does not own the land, but

rather has a license or lease to operate on it. The ownership and control of the land base in most cases rests with the provincial government (the Crown).

The results of the SWOC analysis are presented in [Section 5.1](#).

2.3.8 Product Opportunity Analysis

The ten activities were analyzed to identify the best opportunity areas for the development of new or expanded ecotourism and adventure travel business opportunities. The analysis included consideration of:

- Conflicting recreational activities
- Conflicting recreation and tourism activities
- Resource extraction activities (logging, mining, hunting and trapping)
- Land use zoning
- Critical wildlife areas and sensitive environmental areas
- Transportation activities
- The potential of qualifying for a Commercial Recreation tenure per the criteria established by the B.C. Assets and Land Corporation on Crown Land, and
- Results of the SWOC analysis.

In addition, the knowledge and advice from extensive consultation with experts and operators for each product was incorporated into the opportunity analysis. The final product of the opportunity analysis is a series of “high opportunity” maps that show potential tourism product development opportunity areas, and an activity-by-activity analysis that clearly links commercial backcountry potential to the most suitable locations in the study area, as well as identifying market potential, infrastructure requirements, and issues that entrepreneurs will have to address in deciding whether to move forward with a development.

(See Section 5.3)

2.3.9 Community Tourism Development

The foregoing research and analysis was applied in the preparation of Community Tourism Development recommendations that focus on broad strategic initiatives, while providing detailed information that is important from a business development perspective. As well, infrastructure recommendations have been developed separately for both Golden and Revelstoke. This section includes the identification of systemic issues and suggestions about community

or district-wide initiatives that could be undertaken to enhance the ability of all levels to take better advantage of the existing opportunities as well as new ones.

2.3.10 Community Open Houses

The draft report complete with maps was presented to the public at two open houses held in Golden and Revelstoke in mid-March. A total of twenty-five people attended these events.

2.3.11 Final Report

Comments were incorporated from the public review and Advisory Committee review, and the Tourism Opportunity Strategy report and contract deliverables were submitted to MSBTC on March 31, 2001.

2.3.12 Pre-feasibility Assessments and Best Practices

Pre-feasibility Assessments have been provided as a value-added product for this project. We believe local entrepreneurs and economic development practitioners will find the pre-feasibilities useful, informative and an impetus in moving tourism development into the implementation stage. One of the problems with tourism action plans, is they do not generally speak about the “on-the-ground” issues surrounding implementation. While opportunity identification is important, it will not, by itself, stimulate further development – the pre-feasibilities (together with an action plan) will hold up better as a development tool because they will provide the necessary micro-economic information that entrepreneurs are looking for. The pre-feasibility assessments are incorporated in the workshop results and are found in [Appendix 3](#) in this report.

An additional valued-added product we have provided is a series of case studies of **Best Practices** that help to illustrate business opportunities and recommendations. The Best Practices are included in [Chapter 6](#) of the report.