3.0 Regional Tourism Profile

3.1 The Study Area – Columbia Forest District

The Columbia Forest District covers three major physiographic areas; the Rocky Mountains, the Rocky Mountain Trench and the Columbia Mountains.

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The Rocky Mountains, to the east of Kinbasket Lake and the Columbia River south of Kinbasket Lake are world renowned for their scenery, heights and relief. Their "matterhorn" peaks are the result of cirque glaciation, while valley outlines have been modified by both ice and water erosion.

The Columbia Mountains, consisting of the Purcell, Selkirk and Monashee Mountains are to the west of the Rocky Mountains. They are older than the Rocky Mountains and extremely rugged, having been sculpted like the Rocky Mountains, by cirque and valley glaciation. Dividing the Columbia and Rocky Mountains is the Rocky Mountain Trench, a wide valley extending in a northwesterly direction from the B.C. - U.S.A. border to the B.C. - Yukon border.

The Columbia River flows north in the Rocky Mountain Trench, then south between the Selkirk and Monashee Mountains. Three large reservoirs on the Columbia River provide for much of the low elevation water based recreational activity.
This area is in the Interior Wet Belt and receives precipitation second only to that of the west coast. The climate is continental with cool winters and warm summers. The valley bottom temperatures are moderate from May to September, and warmest in July and August. The alpine meadows and subalpine forests are snow free from mid-July to mid-October, but adverse weather may be expected year round.

The recreational opportunities are consistent with the rugged nature of the terrain. In summer, camping, fishing and picnicking are pursued along the watercourses and lakes at lower elevations, while at higher elevations heli-hiking, hiking and mountaineering are pursued. Hiking and hunting are popular in the fall, giving way to heli and cat skiing, cross-country skiing, ski touring, alpine skiing at resorts and snowmobiling as the snowpack increases. Wildlife viewing and visiting hotsprings occurs throughout the year. The presence of four National Parks within this district offers unique opportunities as well as distinct challenges to the development of ecotourism and adventure travel within the study area.

Access to the area from the east and west is by Highway 1, from the south, Highway 95 provides access to Golden and Highway 23 provides access to Revelstoke. The relative isolation of these communities as well as historic oscillations in their largely resource-based economies has contributed to significant community interest and involvement in how forest resources and other values are managed.

3.2 Industry Structure

3.2.1 Revelstoke

There are currently 87 tourism-related businesses in ***Revelstoke***, including 38 hotels/motels/B&B's, 15 campgrounds, 7 backcountry huts/lodges, an 18-hole golf course, and alpine ski resort, and 18 tour operators. There are more than 40 food service establishments, although many of these cater to local customers rather than tourists. There are several facilities offering small convention space, although most are public buildings. Revelstoke has four different museums close to the downtown and another eight tourist attractions oriented to highway visitors. The two national, five provincial and two municipal parks in the area are significant components of the tourism product mix. They draw visitors and provide a host of opportunities for outdoor recreation. The community is a handy base for guided and self-guided activities because of its central location and its day-trip distance to national and provincial parks.

In terms of backcountry tourism, the area offers visitors a good mix of summer and winter activity options ranging from heli-skiing and heli-hiking, cat skiing, hiking and hunting to rock climbing. The quality of the resources that support some of these activities attracts visitors from both the short and long haul markets. Many of the tourism businesses for the major products (heli-skiing, heli-hiking, cat-skiing, snowmobile tours), are well established with national and international clientele.

There are approximately 15-20 operators based in Revelstoke offering soft and hard adventure activities. These include helicopter companies, snowmobile rental/tour operators, horseback outfits, river-rafting companies, fishing tour operators, heli-ski and cat-ski operators and bike rental/tour companies. There are additional; tour operators operating out of Revelstoke, some of which are not formally recognized with commercial recreation tenures.

3.2.2 Golden

There are 74 tourism-related businesses located within the ***Golden & District*** area. Types of businesses include accommodation (38), campgrounds (6), backcountry huts /lodges (7) and tour operators (16). In addition to these area-based tourism businesses, non-resident tourism businesses mostly from the Banff / Lake Louise area operate seasonally within the area. Estimates range from 10 to 20, but the number could be higher. Like Revelstoke, Golden is in close proximity to several parks, in this case, five major National Parks. These parks represent an internationally significant tourist drawing card that has yet to be fully promoted by the community.

The 16 tour operators based in the Golden area offer a variety of backcountry tourism products and activities, including fishing, canoeing, white water rafting, cycling, hiking, skiing, heli-hiking and heli-skiing, and bird watching. There are additional tour operators operating out of Golden, some of which are not formally recognized with commercial recreation tenures. As with Revelstoke, the community is a handy base for guided and self-guided activities because of its central location and its day-trip distance to national parks. Golden provides one of the best bases in the province for the hut-to-hut experience, summer or winter. Hut-to-hut hiking and ski touring has seen some development in the last decade. The area has also developed a bit of a destination status for cycle touring (Golden Triangle) and hang-gliding (Mt. Seven) in recent years. Golden also has a ski resort (Kicking Horse Resort) that is quickly gaining a national and international reputation as a skiing destination, and a golf course which is recognized as one of the best courses in the province.

3.3 Current Visitor and Statistical Data

3.3.1 Overview of Visitor Characteristics

According to the 1997 BC Visitors Study[1], the East and West Rockies regions (a small part of which is the study area) accounted for 12% and 8%, respectively, of the 30.6 million visitors to BC in 1996. The share of non-resident visitor volumes is relatively high because of the regions' position as the entry point for west bound Trans Canada Highway from Alberta. In contrast to non-resident visitation, the share of resident visitation is among the lowest of any region in the province. The preponderance of pass-through highway traffic means lower trip spending and shorter trip lengths and this translates into a share of total spending of approximately 4% to 5%.

The average party size was around 2.2 people for non-residents and 2.7 for residents, with significant percentages of solo travellers. Families with children represented less than 20% of all travel parties. The average age of out-of-province visitors was about 49 years, slightly older than the average age of BC visitors, which was 47 years. Overseas visitors tended to younger on average, while North American visitors were older (one third were retired).

Summary Visitor Data

	East Rockies			West Rockies		
	Non-resident	Residen t	Total	Non-resident	Residen t	Total

[1] British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

Total number of visitors (thousands)	3,049	549	3,598	1,563	929	2,492
Percent of BC	26%	3%	12%	13%	5%	8%
Total amount of expenditures (millions)	$344	$57	$401	$184	$121	$305
Percent of BC	6%	2%	5%	3%	4%	4%
Ave length of stay	3.6	2.4	3.4	2.9	2.8	2.9
Ave Per Person Per Day Expenditure ($)	$32	$47	$34	$40	$51	$46
Ave Per Person Per Stay Expenditure ($)	$113	$105	$112	$118	$130	$127

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.2 Visitor Origin

The Columbia region caters to a geographic mix of visitors, predominantly from close-in markets. Approximately 75% of non-resident visitors were from regional markets in Canada (Alberta and Saskatchewan) and the US (Washington, Oregon, Idaho). Long-haul markets are also important, accounting for another 14% of visitors.

Visitor Origin

	Overnight Visitors %	
	East Rockies	**West Rockies**
Non-resident Visitor Origin		
Regional Canada	68	59
Regional US	5	17
Long Haul Canada	7	6
Long Haul US	7	7
Asia/Pacific	5	3
Europe	7	8
Other Overseas	1	1
BC Resident Visitor Origin		
Lower Mainland	32	34
Vancouver Island	3	9
North	1	2
South	64	55

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.3 Trip Purpose and Activities

The primary trip purpose for nine out of ten visitors was leisure, with the other roughly 10% travelling on business. Among non-residents, the most popular activities were sightseeing, swimming and hiking/backpacking. Approximately four percent of visitors to the West Rockies were primarily interested in a backcountry wilderness experience, versus only one percent in the East Rockies. When the various outdoor adventure activities are combined, they cover approximately one quarter of all visitors.

Primary Trip Purpose and Activities

	East Rockies		West Rockies	
	Non-resident Total %	BC Resident Total %	Non-resident Total %	BC Resident Total %
Primary Trip Purpose				
Leisure Visitors	91	91	91	92
Business Visitors	9	9	9	8
Main Activities				
Sightseeing	27		25	
Swimming	20		15	
Hiking/backpacking	19		14	
Golfing	19		12	
Visiting friends and relatives	10		11	
Resting/relaxing	10		7	
Downhill skiing	4		7	
Zoos/gardens/natural displays	4		6	
Art galleries/museums	3		5	
Exploring backcountry wilderness	1		4	
Sporting events	1		4	

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.4 Transportation

Almost nine in ten visitors to the region used motor vehicles (car/truck/van/motorcycle) to travel within the province. Camper/RV travel was also popular, but more so for non-residents than residents.

Travel Characteristics

	East Rockies		West Rockies	
	Non-resident Total %	BC Resident %	Non-resident Total %	BC Resident %
Mode of Transportation in BC				
Car/small truck/van/motorcycle	85	89	87	88
Ferry with car	1	7	16	14
Plane	5	2	1	6
Camper/RV	20	8	14	8

Motorcoach/bus	5	3	3	2
Taxi/limo	-	1	1	2
City transit	3	*	9	2
Personal boat	-	-	-	2
Cruise ship/charter or rental boat	-	-	-	1
Ferry without car	2	-	2	-
Train	1	-	2	-
Other	-	-	-	3

* Less than 1%.

Source: British Columbia Visitors Study: Report on Travel to BC East Rockies (& West Rockies)

3.3.5 Trip Experience

The 1997 BC Visitor Study indicated that travellers to BC who entered either the East Rockies or West Rockies tourism regions during their visit were very satisfied with their trip experience. Outdoor activities rated very highly, and the farther they travelled to BC the more satisfied visitors were. Not surprisingly, viewing scenic areas and especially mountain areas was mentioned as being very important in their decision to travel to BC in the first place. Almost nine in ten of these visitors were impressed with BC's spectacular natural beauty in the scenic and mountain areas they observed during their trips.

3.3.6 Room Revenues

Tourism in the study area (as measured by statistics for the Columbia-Shuswap Regional District) has been growing over the last five years, although performance lags provincial and Vancouver Island growth rates. Revenue growth in the CSRD has been spread across all revenue categories, with the best performance in vacation rentals and the poorest in fishing lodges. During the same 1995 to 1999 period, the Thompson Okanagan and BC both experienced growth across all revenue categories, with rapid growth in hotels and vacation rentals.

Regional Room Revenues

	1995 Revenue ($,000)	1996 Revenue ($,000)	1997 Revenue ($,000)	1998 Revenue ($,000)	1999		
					Revenue ($,000)	Proper-ties	Rooms
BC Totals	999,453	1,093,487	1,157,582	1,206,097	1,328,932	2,293	81,982

Thompson-Okanagan Totals	137,712	139,958	146,520	155,799	166,895	597	18,042
Columbia-Shuswap	24,928	26,327	26,811	27,681	28,933	118	3,015
Fishing Lodges	137	137	189	129	146	7	54
Hotels	10,516	11,466	11,254	11,764	12,489	21	1,049
Motels	10,559	10,290	10,763	10,952	11,268	54	1,429
Vacation Rentals	1,315	1,581	1,701	1,943	1,985	14	195
Miscellaneous	2,400	2,853	2,905	2,893	3,044	22	288
Source: BC Stats							

3.3.7 Traffic Volume Trends

The highway system is a critical transportation service for the region and represents the lifeblood of much of its economic activity. The Trans Canada Highway (Highway #1) handles most of the visitor traffic east and west across the region. The following table provides average summer daily traffic (SADT) for four count stations, all on Highway #1. There have not been significant population fluctuations during this time in either Revelstoke or Golden, so it is reasonable to conclude that a good portion of activity change can be attributable to visitors. All count stations have seen a very modest growth in summer traffic, ranging from 0.8% to 1.5% since 1991. However, highway traffic appears to have peaked in 1995 after strong growth in the early 90s.

Summer Average Daily Traffic (SADT), Trans Canada Highway, 1991-1999

	1991	1992	1993	1994	1995	1996	1997	1998	1999	Avg. Yr. Growth
At west end of Columbia River Bridge, west of Revelstoke	10,500	10,700	12,300	12,400	12,961	n/a	n/a	12,156	11,982	1.5%
4 km east of Rte 23, east of Revelstoke	8,000	8,300	9,100	8,800	8,899	n/a	n/a	8,521	8,560	0.8%
3.2 km west of Rte 95, west of Golden	8,500	8,900	9,700	10,000	10,711	n/a	n/a	9,461	9,546	1.3%
2.5 km east of Rte 95, Golden	7,412	7,453	8,025	8,407	9,175	8,353	7,997	8,484	8,434	1.4%

Source: Ministry of Transportation and Highways

3.4 Key Market Trends and Indicators

The tourism industry within British Columbia is a vital and vibrant component of the British Columbia economy. The following trends are meant to illustrate the opportunities in tourism, particularly the outdoor adventure/ecotourism component, and highlight the need for effective tourism planning throughout the province[2].

Visitor Volumes – The volume of visitors to the province continues to increase. In 1999, British Columbia hosted 22.3 million overnight visitors an increase of 2.1% from 1998. Nearly half (48%) of these visitors were British Columbia residents. Travellers from other parts of Canada accounted for 4.8 million visits (21.7%) a 1.7% increase over the previous year. Visitation from the US, Asia/Pacific and Europe have all been increasing in recent years.

Expenditures - Tourism revenue totalled $9.2 billion in 1999, a 4.9% increase over 1998. Positive revenue growth in 1999 was attributable to US, British Columbia, Canadian and European markets. Visitor spending among key markets varied with the length of stay and per day expenditures. British Columbia residents represent half of total visitor volume last year but only one quarter of the revenue whereas overseas visitors contributed 18% of the total revenue while representing only 7% of the volume.

Employment - In 1998, 112,940 people were directly employed in British Columbia's tourism industry, ranking it fifth in provincial employment and ahead of all of the goods-producing (resource-based) sectors. Tourism employment in British Columbia accounts for approximately 1-in-12 jobs in the province. Growth

[2] Statistics in this section are sourced from the Research Services Branch of Tourism British Columbia.

in tourism employment rose 31% in the ten-year period from 1989 to 1998, approaching nearly double the provincial average of 19%.

Tourism and Rural Job Creation - Clearly, tourism is a prime growth engine for rural British Columbia because it can create new and relatively stable long-term jobs for local residents[3]. This is significant considering that most North American tourism destinations have enjoyed stable or expanding markets for several decades, at a time when primary resource industries have experienced cyclical, and too often permanent, downturns in jobs. Tourism jobs are readily accessible to local residents, as they often require a familiarity with the region. Tourism is particularly important as a generator of youth, entry-level jobs.

Tourism and Regional Economic Development - Tourism is important to the economic diversification and health of many rural BC communities. Tourism is the only industry with a positive net flow of funds from wealthier to poorer regions, and from urban to rural communities. Because of the nature of the tourism sector, the majority of the money spent is imported from other geographic regions, and is new to the host community. As a result studies show that tourism revenue can result in a five to seven times multiplier effect in local communities[4].

Ecotourism/Adventure Tourism - Ecotourism is that component of the tourism industry that focuses on the experiencing of natural or indigenous culture in a way that minimizes impacts. Ecotourism appeals to a global market, particularly well educated, affluent, urban residents from developed countries. BC's high quality and diverse natural scenery offer the competitive conditions for the province's expanding eco-adventure tourism sector. Tourism BC estimates the value of ecotourism and adventure tourism to be in excess of $900 million annually[5]. Significant as this is, as important is the fact that BC rates as a top adventure tourism destination in North America[6]. Ecotourism is the fastest growing segment of the BC tourism sector. Furthermore, the opportunities for expansion of BC's ecotourism sector are substantial. This is important given that one-half of U.S. adults – or 98 million persons – took an adventure vacation within the past five years. A recent national survey of the ecotourism and adventure tourism sector in Canada concluded that "Canada's natural environment, encompassing vast unspoiled wilderness areas and spectacular scenery is ideally suited to the development of adventure travel and ecotourism and is already the basis of an internationally competitive product base."[7]

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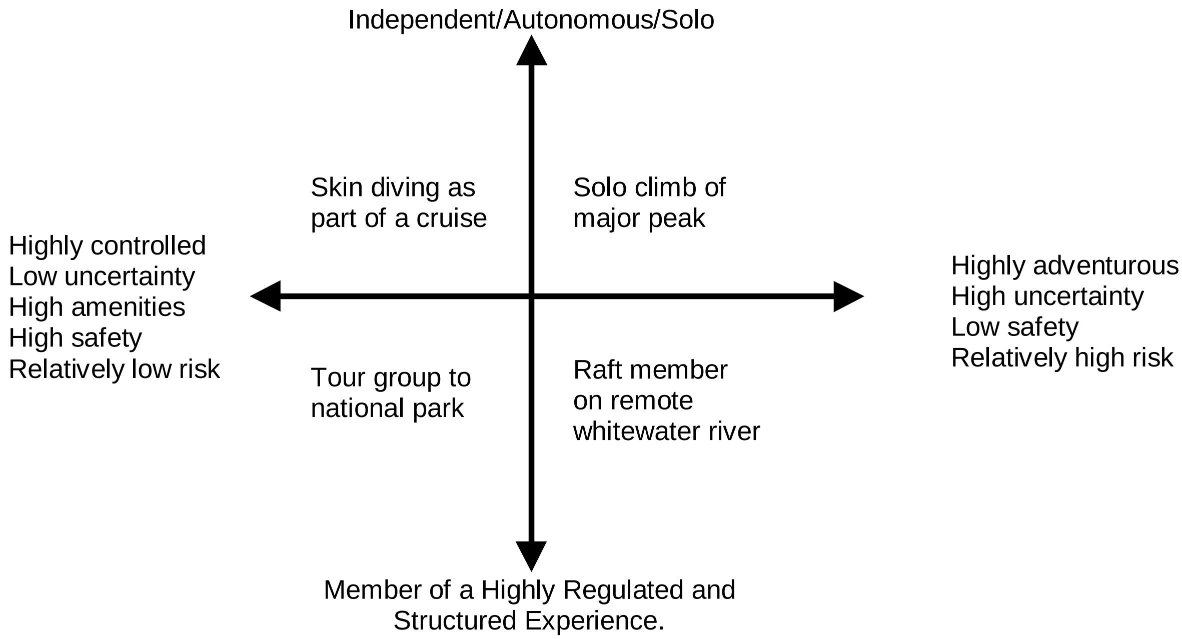
[3] Cited in: Jobs and Environment — Moving British Columbia into the 21st Century, BC Ministry of Environment, Lands and Parks, 1999.
[4] Shoaf, W. "Sundance". Article for Business Coalition for Sustainable Cities, at http//www.earthpledge.org/progress/wpapers/wpsundan.html.
[5] Tourism BC.
[6] Travel Industry Association of America. January 1998. The Adventure Travel Report, 1997.
[7] The Randolph Group. January ,1997. Adventure Travel and Ecotourism in Canada: Strategic Framework for Development. A report prepared for the Canadian Tourism Commission.

The Adventure Tourism Experience



Trends in Outdoor Recreation: Programs, Experiences and Issues, Alan W. Ewert, Indiana University, 2000

The Adventure/Ecotourism Experience – The outdoor adventure/ecotourism market is expanding, but it is also changing, placing greater value on flexible packaging, well qualified hosting and guiding, learning and interpretive experiences, and sustainability practices. The outdoor adventure experience encompasses four major characteristics: (a) involvement with a natural environment, (b) elements of risk and danger, (c) uncertain outcome, and (d) influenced by the participant or circumstance. These components serve to separate adventure recreation from other forms of recreational activities. The adventure experience can also vary along a number of dimensions including type of travel, group membership, and/or amount and spectrum of risk. This variance is illustrated in the preceding figure. The adventure travel industry uses potential risk as a parameter in categorizing adventure activities into hard or soft activities. Most operators are now familiar with this terminology but have to be increasingly aware of further fracturing and the implications this will have for both product and market development.

Access and Opportunities – Access and opportunity is paramount to adventure recreation and since the bulk of the land base is Crown land, these are usually determined by provincial land managers. Allowable activities, acceptable practices and facilities are the three main parameters determining what activity occurs and where. Adventure activities are increasingly seen as a legitimate use of Crown lands but it has only been in the very recent past that multiple-use concepts have even been mentioned in the policy framework. The industry, and communities which rely on the related economic benefits, have to ensure that adventure tourism interests have a rightful place within the land and resource management regime.

Technology – In general, technological innovations, whether equipment or clothing-oriented, impact the adventure recreation experience in five ways: access/transportation, comfort, safety, communication, and information. This has enabled lesser skilled participants to participate in activities at the more extreme end of the spectrum. In the end, this will continue to increase participation and open up new opportunities for business and market development.

Societal Acceptance – A number of emerging trends suggest that outdoor adventure recreation is becoming much more accepted by the public than has previously been the case. Coverage by the mass media, the growth of adventure programs for therapeutic intent and the growth of training programs that incorporate adventure activities are some examples of how pervasive outdoor activities have become. This will not only increase participation, demand and business opportunities, but place tremendous pressure on land managers to actively manage for tourism values when this has not occurred in the past.

Implications for Tourism Development in the Columbia District – Future tourism growth in Canada and British Columbia will be driven by interest in outdoor experiences, particularly those in the soft adventure market and ecotourism. The Columbia region has many of the attributes needed to appeal to these markets but development will depend on key responses. Operators should provide the features and amenities that have the strongest appeal for local travel markets, which tend to be in the soft adventure category. Incorporation of technology and innovation will help communities to broaden market appeal for activities in demand, and improve their own competitiveness. They must seek greater cooperation with land managers and communities to ensure the Crown land base recognizes the demands and needs of tourism as a legitimate resource user. Communities can play a more prominent role by furnishing infrastructure and support services that underpin the industry and the employment and regional income benefits it can bring to local residents.