

Tourism Development and Ferry Services: A Vision for First Nations and Rural Communities on BC's Central Coast and North Island

Report of the Central Coast / North Island Tourism and Ferries Committee
February 2016



Aboriginal Tourism Association of BC (AtBC)

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Title Page Images - from top left (sources cited in-document):

Artist’s rendering of the proposed Bella Bella Bighouse
Community of Bella Bella shoreline
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View from Spirit Bear Lodge dining area
Elementary school and totems in Bella Coola
Bella Coola dock and marina

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1. Cariboo Chilcotin Coast Tourism Association – Pat Corbett (Co-Chair)
2. Aboriginal Tourism Association of Canada – Keith Henry (Co-Chair)
3. Tourism Vancouver Island – Dave Petryk
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6. BC Hotel Association – James Chase
7. Tourism Industry Association of BC – Walt Judas
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14. Shearwater Resort and Marina - Craig Widsten and Mark Schlichting
15. Bella Coola Valley Tourism – Ernest Hall

The Committee would like to thank the Government of BC for its financial support and proactive engagement in support of this Committee's work.

We also thank representatives from BC Ferries and the B.C. Ministry of Transportation and Infrastructure for meeting with the Committee on January 28, 2016 to share information and discuss our collective interests.

EXECUTIVE SUMMARY

1. This report reflects an unprecedented collaborative effort among Central Coast and North Island local governments, First Nations communities, individual businesses, destination marketing organizations, and sector associations, in establishing a shared **Vision** for the prosperity and well-being of the region's residents.

In addition to the *Vision*, the report identifies specific short-term opportunities related to Aboriginal tourism and coastal adventure tourism, as well as the ferry and other transportation infrastructure required to support these opportunities.

2. The Committee presents the following shared **Vision** for the region:
 - *Local economies that protect and responsibly manage our natural environment, particularly culturally sacred areas and important species, such as wild salmon, Grizzly and Kermode bears, whales, wolves, eagles, and others;*
 - *Diverse and dynamic communities supported by efficient, interconnected transportation networks, creating jobs within or near to our communities; and*
 - *Businesses that preserve and revitalize our history and culture, fostering cultural pride and a sense of belonging among our residents; particularly our youth.*
3. British Columbia's tourism sector is surging, with provincial revenues reaching a record **\$14.6 billion in 2014**, and 2015 revenues are projected to be 5-10% above 2014 levels. Aboriginal tourism and adventure tourism are leading the growth among all tourism sub-sectors. From 2006-2011, **Aboriginal tourism revenues in B.C. doubled**, currently estimated at **\$52 million in direct annual revenues**. Adventure tourism is estimated to have annual direct revenues of approximately \$1.5 billion per year.
4. The Central Coast and North Island region has **immense growth potential in Aboriginal and adventure tourism**. The region's spectacular and diverse ecology and geology include grassland plateaus, the highest mountain peaks in the Coast Mountain Range, stunning temperate rainforests, and inimitable marine ecosystems teeming with a vast array of flora and fauna. The region hosts **North America's most abundant populations of apex predators** such as Grizzly and the famous Kermode (Spirit) bear, wolves, wolverines, orcas, bald eagles, and other animals that are top attractors for high yield international tourists. The region also boasts a rich cultural heritage that many First Nations communities wish to revitalize and share. However, growth in the Central Coast Aboriginal tourism sector has lagged behind other regions of B.C., likely due to transportation access challenges. While Aboriginal tourism in B.C. overall increased by approximately 100% in the past five years, an expert panel estimated the Central Coast sector's growth at 15-20% in the same period.

5. **Supporting the Vision: A Three-Pronged Approach.** In order for the *Vision* to be realized of a transformed Central Coast and North Island, the following measures are required:
 - I. Targeted **planning** to support **tourism development** – individual business products, experience clusters, and destinations;
 - II. Robust and strategically aligned **co-operative marketing** efforts; and
 - III. Adequate and properly configured **transportation access** infrastructure.

6. **Supporting the Vision: Destination and Product Development.** The North Island and Central Coast each possess a multitude of compelling and unique tourism development opportunities, as identified in current inventories. Many development projects have been initiated recently, while others require additional support to get off the ground. A comprehensive Destination Development Plan is required to identify and fully capitalize on these opportunities. A preliminary market assessment estimated that **11,000 to 18,000 visitor trips** could be stimulated through a combination of product development, marketing, and enhanced access. This would produce an estimated **\$10-\$16 million** in annual economic activity, increasing the feasibility of further business ventures and supporting high quality jobs in the region.

7. **Supporting the Vision: Marketing.** The Committee recognizes the value of strategic marketing, and the recent attention to this region presents unprecedented opportunities to capitalize on awareness of this region. Committee members and partner agencies involved in this project have the expertise, financial resources, and distribution channels to coordinate and execute a successful, integrated co-operative marketing program. Additional resources are also now available via Destination BC to support co-operative marketing of this type.

8. **Supporting the Vision: Access.** In order to stimulate and support substantial increases in tourism visitation to the Central Coast / North Island region, an **adequate “feeder” service is required**. The only prior direct daylight ferry service between Port Hardy and Bella Coola averaged 37.5% capacity utilization (approx. 45 vehicles) per sailing during the 2012 operating season. With increased visitor volumes to the region, **opportunities emerge to better distribute benefits throughout the region**, via a sub-regional hub-and-spoke distribution model out of Bella Coola. Currently, capacity is constrained by the need to serve multiple functions in the region with a single vessel, including providing fundamental transportation services for residents, transporting goods and cargo throughout the region, and providing adequate capacity for peak season tourism volumes to support much-needed economic development in the region. The Committee also **recognizes the need for BC Ferries to maximize its financial viability** and for MoTI to limit taxpayer support levels. With vessel standardization and interoperability, options emerge for redeploying capacity elsewhere if the demand does not materialize, **limiting financial risk exposure** of BC Ferries, MoTI, and B.C. taxpayers.

Recommendations: Tourism Product and Destination Development

1. That representatives from this Committee and MJTSD support proposals for the Central Coast and North Island regions in the forthcoming May 2016 Destination BC Expression of Interest process to develop Regional Destination Development Plans; this report can be used as a launching platform for this process.
2. That the Destination Development Plan(s) estimate the demand for tourism in the region, in order to inform potential ferry capacity needs and optimal service routing.

Recommendations: Destination Marketing

3. That the Cariboo Chilcotin Coast Tourism Association (CCCTA), Aboriginal Tourism BC, and Tourism Vancouver Island (TVI) be tasked to lead efforts for co-operative marketing. Working backwards from a summer 2018 anticipated new vessel deployment for the Central Coast, marketing would occur in early to mid 2017, requiring applications to be submitted to Destination BC by December 2016.
4. That MJTSD and MoTI consider the advice of the BC Ferry Commissioner to establish a voluntary additional levy to enhance marketing of B.C. Ferries routes, similar to the MRDT.
5. That MJTSD, Destination BC, MoTI, and BC Ferries evaluate ways to further integrate branding opportunities for the region and related services that leverage emerging regional brands, particularly the Great Bear Rainforest.

Recommendations: Access and Ferry Services

6. That MoTI, MJTSD and the Committee commit to evaluating the potential demand for a two-ferry solution in the Central Coast / North Island region, and if sufficient tourism demand can be demonstrated, that MoTI consider amending the Coastal Ferry Services Contract to *enable* a direct Port Hardy – Bella Coola sailing for the 2018 summer season;
7. That MoTI, BC Ferries and the Committee work to identify potential route configuration options to maximize ridership on each route, with clear, independent performance targets for capacity utilization on each route used as targets for tourism demand stimulation;
8. That the Province of BC and this Committee jointly approach the Government of Canada with a proposal to finance a second small-class (~50 AEQ) vessel for deployment in the Central Coast region;
9. That MoTI and MJTSD commit to deploying two small-class vessels in the region as a three-to-five (3-5) year pilot project, and with a decision being made that provides adequate lead times for Rendezvous Canada in May 2017 (for wholesalers to sell the 2018 summer season).

Supporting Ongoing Work of the Committee

10. That MJTSD review the report and respond to recommendations within thirty (30) days;
11. That MJTSD, MoTI, the Committee, and other stakeholders, upon accepting this report's recommendations, work in partnership to establish a Work Plan to support our joint Vision.

1.0. INTRODUCTION

This report presents a *Vision* and *Business Case* to support the economic development priorities of coastal communities in the North Island and Central coast regions.

The perspectives in this report reflect an unprecedented, first-ever collaborative effort among local governments, First Nations communities, individual businesses, destination marketing organizations, and industry trade associations.

This diverse group has united behind a Vision for the economic diversification and sustainable development of Central Coast and North Island communities, using enhanced transportation access and Aboriginal tourism development as key catalysts for growth.

1.1. Report Purpose

This Committee Report summarizes information from several relevant reports¹ developed in the past three years and perspectives of relevant stakeholder groups in the region.

The purpose of this report is therefore to respond to the following questions:

1. What is the shared *Vision* for economic development in the region?
2. What are the specific short-term opportunities related to Aboriginal tourism and coastal / ecotourism in the region?
3. What are the specific ferry transportation capacity and service characteristics that would maximize economic development opportunities? How can these specifications also ensure the financial viability of the route?
4. What are potential visitor demand levels that could be stimulated by taking a concerted approach to transportation access, product and experience development, and destination marketing?
5. What are the recommendations to senior governments, related agencies, and participating members of this Committee on requirements to support the Vision and the specific opportunities identified in the report?

1.2. Our Vision

The Central Coast and North Island region is a truly remarkable area, with diverse landscapes, unparalleled marine ecosystems, rich Aboriginal cultural traditions, and pioneering entrepreneurs. The rugged and diverse landscape serves as a metaphor for the residents who call this area their home.

In this context, the partners involved in the Committee have developed the following Vision for the region:

The Vision:

- Local economies that protect and responsibly manage our natural environment, particularly culturally sacred areas and important species, such as wild salmon, Grizzly and Kermode bears, whales, wolves, eagles, and others;
- Diverse and dynamic communities supported by efficient, interconnected transportation networks, creating jobs within or near to our communities; and
- Businesses that preserve and revitalize our history and culture, fostering cultural pride and a sense of belonging among our residents; particularly our youth.

1.3. Supporting the Vision through Tourism

Members of the Committee, including partners from outside the Central Coast / North Island, recognize this region's truly unique and inimitable combination of ecological and geological diversity, cultural richness, and opportunity to capitalize on these advantages.

To fully realize our economic potential, remote regions such as the Central Coast and North Island require, more than anything, modern and efficient transportation infrastructure that enables the efficient movement of people and goods to, from, and throughout the region. In advanced free market economies, isolated communities simply cannot prosper. With our rugged coastline and many isolated communities, this primarily means aligning ferry infrastructure with present needs and long-term opportunities.

2.0. TOURISM OPPORTUNITIES ANALYSIS

At the heart of this Business Case is an understanding of the current and near-term tourism development opportunities to provide stable, ongoing employment to residents of the region. Tourism and the broader visitor-based economy, including economic and employment spinoff benefits (indirect and induced impacts) hold significant potential to provide diverse and rewarding employment opportunities for residents of the region.

2.1. Tourism Trends – British Columbia

British Columbia's tourism industry has been a leading source of stable, reliable economic growth for the province for more than twenty years. Industry growth patterns often run counter to commodity cycles, benefitting from low commodity and energy prices during challenging economic times. The industry is also under-appreciated for providing broad-based employment spinoffs in diverse field such as finance, insurance, real estate, construction, and manufacturing – in addition to the traditional tourism-related industries such as transportation, accommodation, food and beverage, arts and entertainment, and travel services.

In February 2016 Destination BC released its annual *Value of Tourism* report, which estimated **2014 provincial tourism revenues to be \$14.6 billion**; a 5.1% increase over 2013. International visitor volumes were 7.9% higher in 2015 compared with 2014, and the 2016 travel season is expected to continue breaking records for visitation, revenues, and employment. The mid-term outlook for the sector appears very strong.

2.2. Aboriginal Tourism

The Aboriginal tourism industry in B.C. is outpacing growth in any other tourism-related industry by a significant margin. AtBC estimates that annual **Aboriginal tourism revenues doubled between 2006 and 2011**. A recent report by the Aboriginal Tourism Association of Canada (ATAC) estimated annual **Aboriginal tourism revenues in B.C. at \$987 million**.

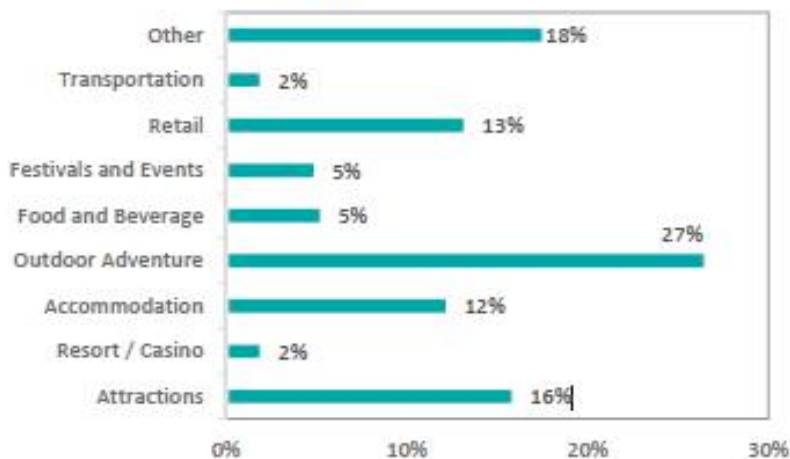
In this same period, the percentage of visitors undertaking an Aboriginal tourism experience increased by 69%, with almost one-in-four visitors now including an Aboriginal cultural experience as part of a trip itinerary.

However, not all regions have benefitted from the explosive growth in interest in Aboriginal tourism in the same period. For the Coast-Chilcotin region, for example, a panel of local tourism experts estimate that the region's Aboriginal tourism industry grew by approximately 15-20% over the same period, while B.C. overall witnessed a 100% increase. This suggests significant opportunity for future development, in light of the region's many tourism development assets (to be discussed later).

The sub-sectors of Aboriginal businesses are identified in the figure below.

Figure 1: Aboriginal Tourism Businesses in BC

**BC - Aboriginal Owned Tourism Businesses by Primary Activity
(n= 301)**



2.3. Marine / Coastal Tourism Sector

One of the largest segments of the B.C. tourism industry is the marine/coastal sector, comprising a variety of ocean-related activities including sport fishing, whale and animal viewing, kayaking, ferries and pocket cruises, sailing, scuba diving, and waterfront activities such as beach-combing.

In 2007 the BC Government commissioned a report on the value of ocean-based industries in the province.¹ Their findings concluded that of the \$11.6 billion in total ocean-based economic activity, **ocean recreation was the largest contributing sector, at \$3.8 billion** in annual revenues, slightly ahead of even ocean transport (\$3.3 billion), and much greater than seafood (\$1.4 B), and ocean high tech (\$1.1 B). Out of the \$3.8 billion in ocean recreation, nearly 80% or \$3.0 billion was the direct result of tourist spending.

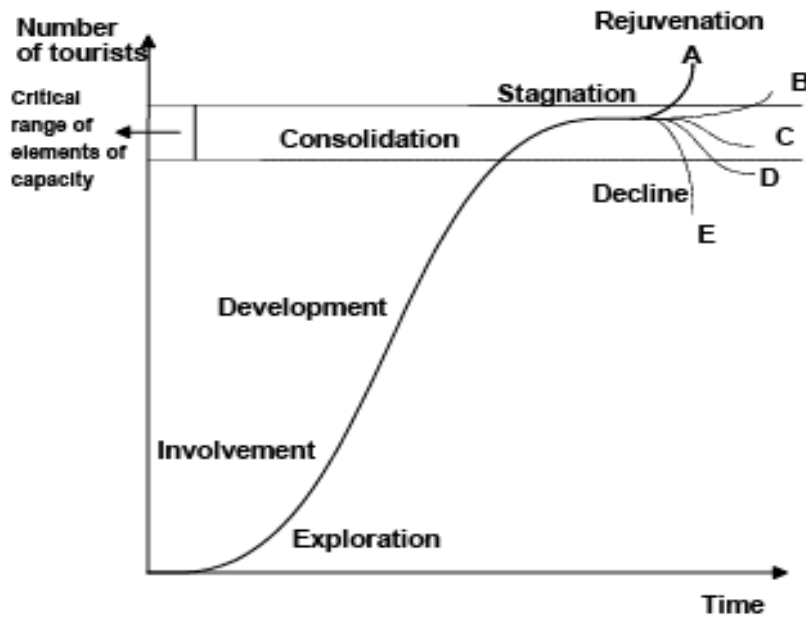
Based on historical tourism growth rates, it is expected that **ocean-based tourism recreation in B.C. is valued at more than \$4 billion in direct revenues in 2016.**

¹ GS Gislason & Associates, “Economic Contribution of the Oceans Sector in British Columbia,” April 2007. http://www.destinationbc.ca/getattachment/Research/Research-by-Activity/All-Research-by-Activity/Characteristics-of-Commercial-Nature-Based-Tourism/Characteristics_of_Commercial_Nature-Based_Tourism-sflb.pdf.aspx

2.4. Regional Tourism Development Context

The tourism economy on the Central Coast and North Island would be characterized as being between the “involvement” and early “development” stages, according to the commonly utilized destination life cycle model (RW Butler, 1980). This model takes into account factors such as visitation volumes, product and experience quality, business “export readiness,” visitor awareness, training levels, visitor servicing, product consistency, and others.

Figure 1: Butler’s Tourism Development Life Cycle



During the region’s peak visitation period of 1996-1998, with nearly 10,000 annual visitors, its tourism industry – particularly the Aboriginal tourism segment – was still in its infancy. Since that time, major investments have been made in product development and branding, the lucrative international travel trade / group tour segment has been nurtured, numerous training initiatives developed, cultural protection protocols established, and destination marketing partnerships put in place.

The region is heavily reliant on the European travel market, which is also considered by local tourism stakeholders to hold the highest growth potential. Importantly, this segment is also the most reliant on local ferry services as part of their travel itineraries (circle tours), with over 80% of this segment using the ferry as part of trip itineraries.

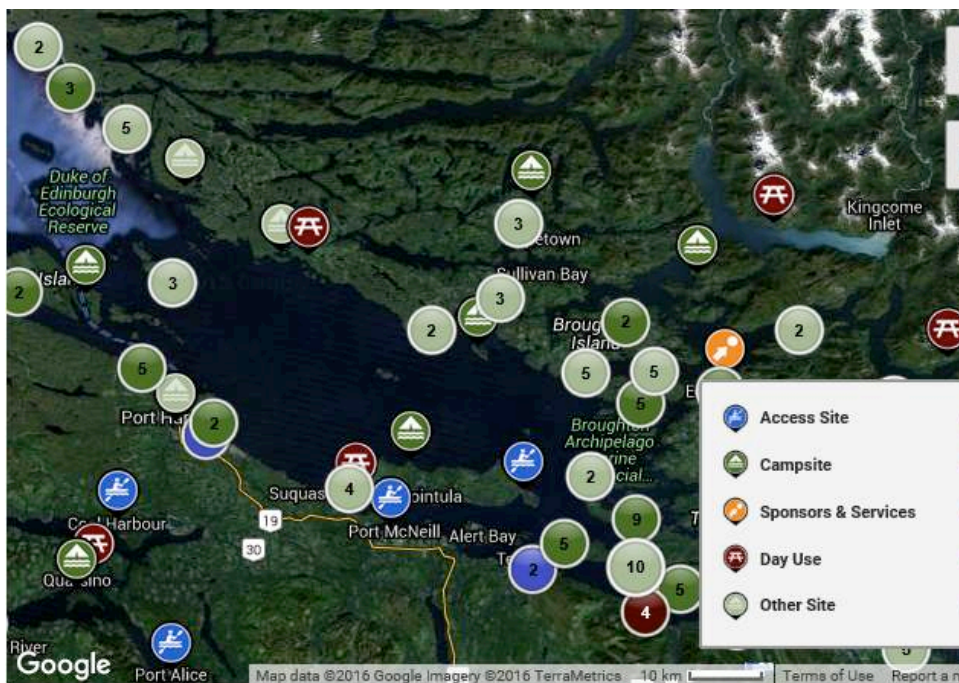
The largest market overall in terms of visitation and expenditures, is the local/regional drive market from B.C., Alberta, and Alaska. These visitors are motivated primarily by adventure tourism opportunities, but may also partake in select Aboriginal tourism activities as part of a trip itinerary.

Significant new opportunities exist to capitalize on the region’s recent branding as The Great Bear Rainforest. The Accord signed in January 2016 between coastal First Nations, the Province of BC, and the coastal forest industry to sustainably manage the forest ecosystems of the region has drawn attention from around the world, and can be leveraged for tourism growth. This “unpaid advertising” likely valued in the tens-of-millions of dollars, helps establish a highly differentiated brand image and provides the basis for a unique selling proposition for visitors to the region, potentially comparable to the Totems of Haida-Gwaii or the Incan pyramids of Mexico’s Caribbean coast.

2.5. Coastal/Marine Tourism Opportunities – North Island Region

British Columbia is increasingly recognized as a global marine tourism destination, with its diverse and spectacular coastline, and abundant species of “charismatic mega fauna” such as orcas, sea lions, dolphins, porpoises, humpback whales, bald eagles, and perhaps the region’s prize attraction: Grizzly and Kermode bears.

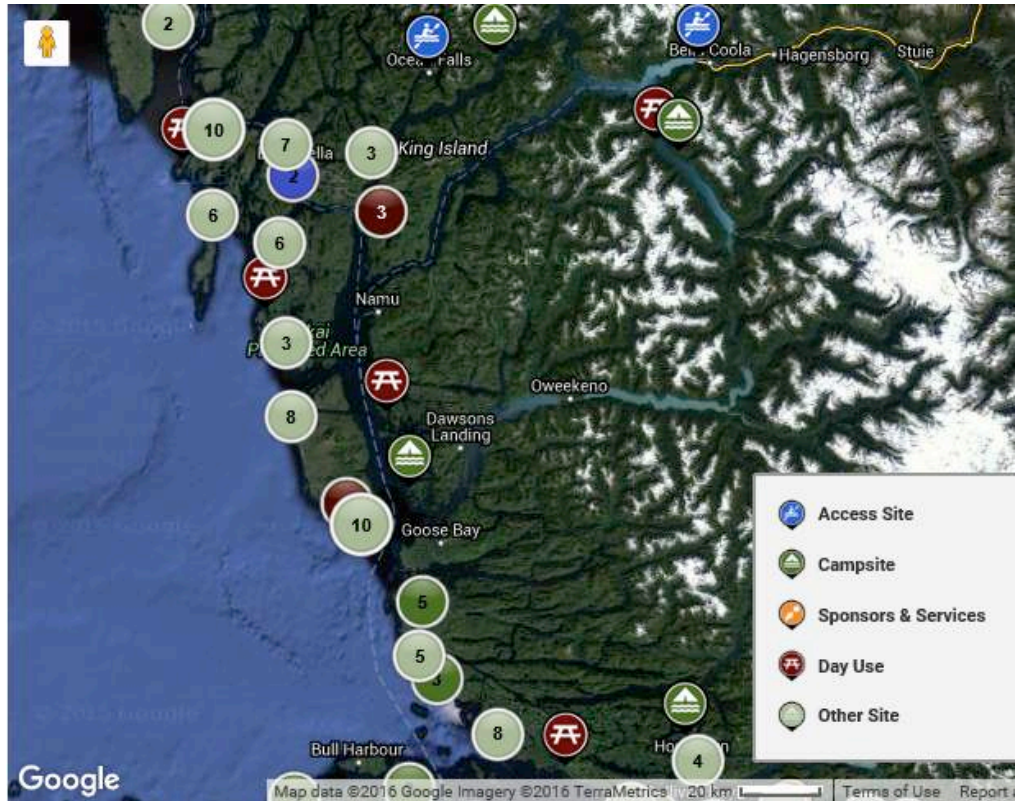
To assist with managing the growing coastal tourism sector, since 2012 various public and private recreation-related agencies have collaborated in identifying and enhancing management of the most commonly used



marine trails in coastal B.C. These trails and infrastructure support activities as varied as sport fishing, kayaking, sailing, pocket cruising, scuba diving, animal viewing (whale, bear, bird), coastal hiking/trekking, and other activities.

Overall marine recreation use levels in this region are high, especially in the North Island / Broughton Archipelago region, which host some of the highest volumes of marine recreationists each year in the province. The North Island / Broughton Archipelago region contains eight (8) designated access sites, 43 campsites, nine (9) day use areas, and 45 other designated sites for access and use.

The Central Coast region has a similar density of designated marine recreation use areas, though with a higher proportion of “other sites” that are commonly used but which may have limited infrastructure or informal management systems. The region includes four (4) designated access sites, 11 campsites, ten day use areas, and 70 other sites.



2.5. Aboriginal Tourism Development Opportunities

AtBC recently updated inventories of Aboriginal Tourism development opportunities for Vancouver Island (2014) and the Cariboo Chilcotin Coast region (2013).

Due to the regions’ remote geographical locations and accessibility challenges, transportation access and route interpretation are emphasized as critical success factors for economic development:

Maintenance of air and ferry carrier schedules at reasonable cost is of paramount importance.... road maintenance and an integrated regional approach to highway signage is critical... [t]he Sea to Sky Cultural Journey from West Vancouver to Whistler provides an excellent example of this type of infrastructure.” (AtBC Vancouver Island Strategy, p. 15)

These two regional strategies identified tourism development opportunities in three tiers of growth potential:

Tier 1: supports communities that are interested in Aboriginal tourism but have low sector awareness. It focuses on building awareness of community opportunities, identifying key assets and cultural practices that could be shared, and elaborating upon preliminary business concepts.

Tier 2: supports businesses that are in operation but not yet market-ready. Business opportunities are more fully identified, specific training and development gaps identified and addressed, and baseline business processes enhanced (reservations, health & safety, payment processing, websites, etc.).

Tier 3: supports enhanced business development and training of market-ready businesses to improve their growth and competitiveness. Tailored training solutions are also identified and provided.

2.5.1. North Vancouver Island Region – Aboriginal Tourism Opportunities

Growth opportunities are immense for Aboriginal tourism in the North Island region, ranging from Tier 1 to Tier 3. The majority of these opportunities are related to development of meeting and cultural exhibition spaces such as Bighouses, culturally significant historical overland and marine-based trail networks, animal viewing, canoe paddling excursions, pocket cruises and boat tours, and various forms of nature-based guided / interpreted tours.

The region also benefits from having a number of Tier 3 market-ready businesses in operation, which serve as anchors for growing related experience clusters in the region.

Figure 4: Existing Market-Ready Aboriginal Tourism Businesses on North Vancouver Island



With almost limitless growth opportunities, AtBC has focused on advancing those products and experiences that are approaching market-ready status, and/or where existing market-ready businesses and infrastructure can be leveraged to catalyze new growth clusters, internships, and other peer support opportunities. If transportation access were to be enhanced, it would

improve the feasibility of these opportunities in particular, enhancing the likelihood of securing venture capital. With projected increases in visitor volumes associated with transportation enhancements, businesses will be more viable and feasibility assessments more likely to yield positive reviews from financiers.

With the development of each new business, economic momentum is created which spills-over into other communities, demonstrating successes to be leveraged and emulated in regional product clusters, and creating a “virtuous circle” of development opportunities. This provide further support for communities and relevant agencies to act on Tier 1 opportunities, identified below. The tourism development literature demonstrates this trend repeatedly, where long-term visions are established and concrete plans put into place.

Among the dozens of development opportunities in the North Island, AtBC has identified five that hold significant promise for short-term development. Each of these projects would receive a significant boost from increased visitation through the region.

Table 1: AtBC Development Priorities – North Vancouver Island

Community	Tier 1 Potential Experiences
Northern Vancouver Island	
Kwakiutl	Tier 1 opportunities related to totem poles in Tsaxis; sandstone petroglyphs, bighouse, old Hudson's Bay post remains; hiking trail/boardwalk - Fort Rupert Trail from Storey's Beach to Bear Cove - wildlife, CMT's can be seen along the trail; guided cultural interpretation using Cluxewe Resort also an opportunity.
Quatsino	Tier 1 - Considering kayaking/cabins along a route, fishing charters; partnerships with existing non-Aboriginal operators should be explored e.g. Quatsino Lodge, Eagle Manor, Hecate Cove
'Namgis	Tier 1- guided cultural interpretive programs being developed for pocket cruise passengers/groups of 25 or more; group 'feast' programs also being explored
Kwicksutaineuk/Ah-Kwa-mish	Tier 1 -Preliminary plan for restaurant/gift shop/art studio camping facilities on Gilford Island - Gwa-yas-dums; use of Bighouse to offer cultural performances/feasts to visitors on a regularly scheduled basis, trail system proposed for hiking; longer-term plan for B&B/ accommodations and museum; full service kayaking trips/guided interpretation
Mamalilikulla-Qwe'Qwa'Sot'Em	Tier 1 - opportunity to upgrade facilities/ expand programming of Adventures Village Island - cabin stays; cultural tours; whale watching; grizzly bear viewing

2.5.2. Central Coast Aboriginal Tourism Opportunities

Compared with the North Island / Broughton Region, the Coast-Chilcotin region has fewer existing Aboriginal tourism businesses that are Tier 3 (market ready) as of 2016, with only five in total. However, there are a number of Tier 2 businesses established, and numerous communities that are becoming increasingly engaged in planning for authentic Aboriginal cultural tourism development.

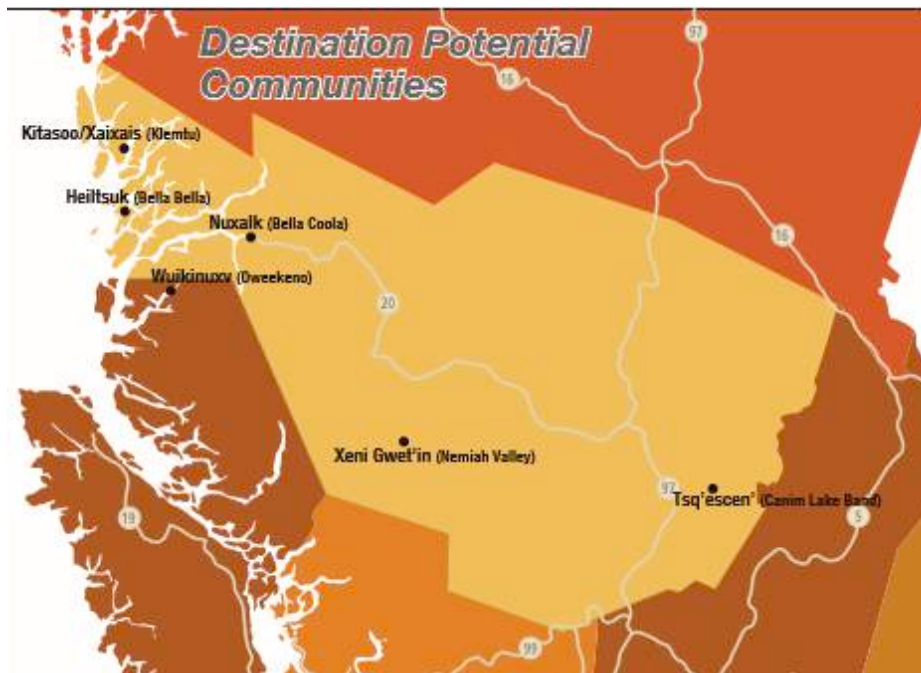
Planning and in some cases construction of new facilities and businesses is already underway, with an initial emphasis on communities that have been identified as having high “destination potential” – that is, their natural and cultural amenities align with significant and demonstrated market demand, and these communities have expressed an interest in actively developing an Aboriginal cultural tourism sector.

Of the communities below, only the Kitasoo/Xaixais in Klemtu have achieved Tier 3 market ready status. The highly successful Spirit Bear Lodge is a full services resort with various guided activities and cultural immersion experiences. The successful, award-winning resort is booking two seasons in advance, and offers examples to other communities on development and growth management.

2.5.3. Growth Opportunities – Short Term Priorities

A number of short-term priorities have been identified for First Nations communities having truly iconic “Destination Potential.” These communities would function as anchors for tourism development, with attractions that are **primary motivators** of travel, as opposed to being merely ancillary activities undertaken as part of an existing journey for other primary purposes.

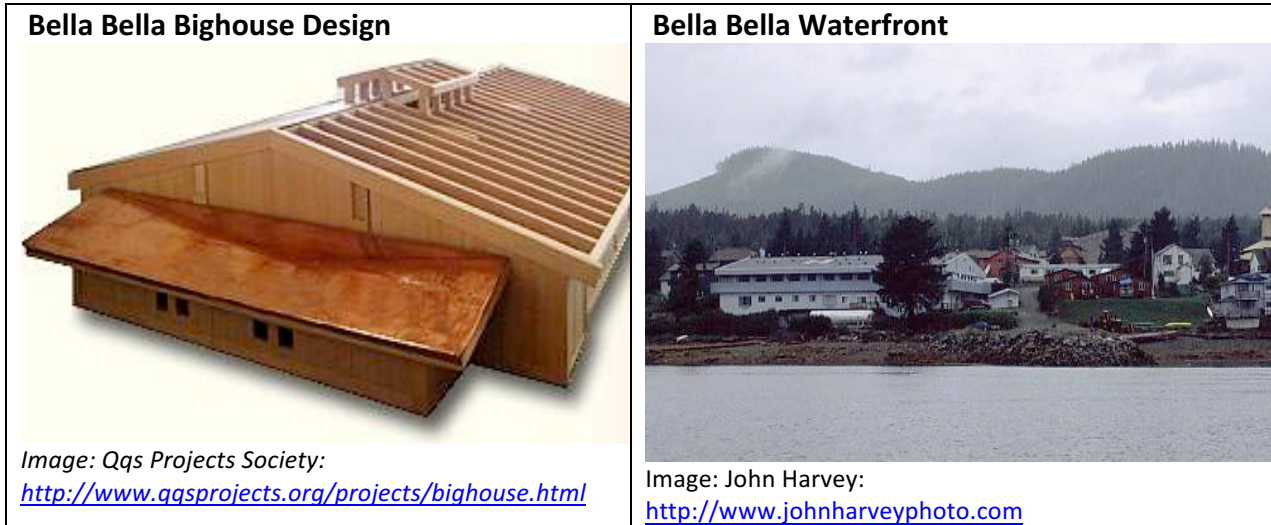
Summaries of these immediate development opportunities are provided below.



2.5.4. Heiltsuk Nation – Bella Bella

The Heiltsuk Nation in the community of Bella Bella has been identified as having destination potential due to its ability to cluster a number of products and experiences. These include:

- Bighouse development for (planning complete and fundraising in progress)
- Development of a nature-based lodge experience
- Partnerships with Shearwater Resort and guided tours into Hakai Luxvbalis Conservancy
- Commercial bear viewing
- Trading route tours



The development of a Bella Bella Bighouse is a critical development component which would serve as the centerpiece for hosting cultural ceremonies and additional activities to support visitor experiences. At present, funds are being raised for Bighouse construction, and a commitment to growing tourism in the region would greatly enhance the fundraising process.

2.5.5. Kitasoo / Xaixais Nation – Klemtu

The Kitasoo/Xaixais already have the region’s most widely known, iconic destination attraction with Spirit Bear Lodge. The focus of this community is thus enhancing the benefits of this renowned resort, including internships and front-line training for community members.

Additional related development in the region is possible, but no significant plans are in place or required for major product or infrastructure development.

Spirit Bear Lodge and Dock – Klemtu



Photos courtesy of Spirit Bear Lodge

Spirit Bear Lodge Great Room



2.5.6. Nuxalk Nation – Bella Coola

The Nuxalk Nation in Bella Coola is another community with destination potential related to emerging and potential clusters of tourism activities and experiences. Bella Coola possesses viable short-term opportunities related to lodge development and commercially guided activities for bear viewing, petroglyph viewing, and multi-day itineraries along the world famous Grease Trail and Alexander Mackenzie Trail.

Bella Coola Dock and Marina



Photos courtesy of Robert Berdan: http://www.canadiannaturephotographer.com/bella_coola.html

Acwsalcta School – Bella Coola



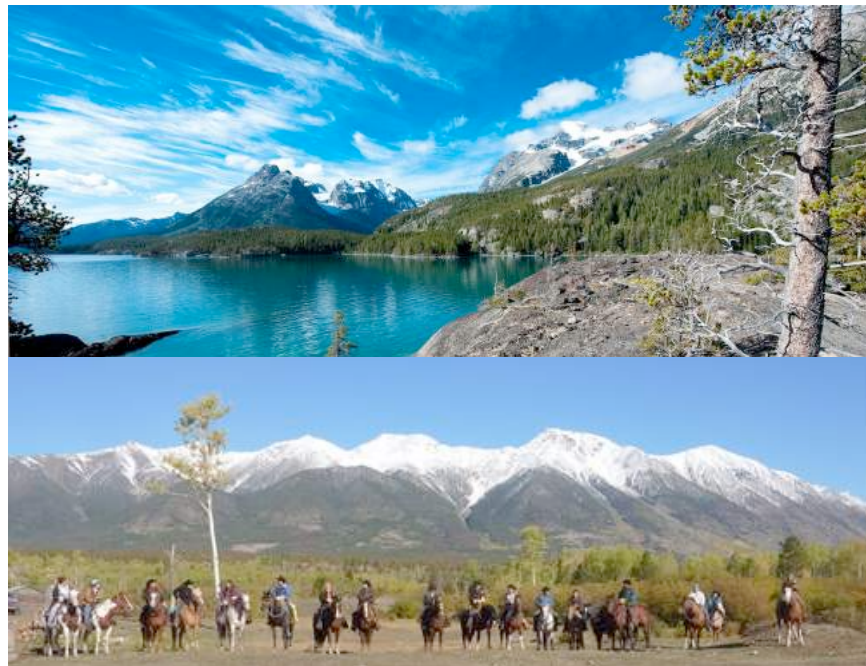
2.5.7. Xenigwet'in

Southeast of Bella Coala is the Xenigwet'in Nation, one of six Tsilqot'in communities located in the south-central Chilcotin region, within the world-famous Nemiah Valley.

The region between the Nuxalk and Xenigwet'in traditional lands is also known as the "Chilcotin Ark" – one of the world's most diverse ecological and geological regions. The region includes grassland plateaus of the Chilcotin, the highest alpine peaks in the Coastal Range, temperate rainforest along the coast and river valley bottoms, and semi-arid desert capped by massive limestone mountains in the southeast. The region's namesake is due to it being a natural sanctuary for some of the most abundant populations of apex predators in the world, including Grizzly bears, mountain lions, wolves, and wolverines, as well as some of the largest and healthiest Canadian populations of woodland caribou, moose, bighorn sheep, and deer.

The Chilcotin plateau and Nemiah Valley in particular are also renowned for having one of the world's few remaining healthy populations of wild horses.

Short term opportunities in the Xenigwet'in community include lodge development(s) on Chilko Lake, refined cultural programs for wild horse viewing, botanicals, partnerships with existing non-Aboriginal businesses, enhanced programming at Traditional Village, overnight stays at the pithouse, Healing Centre programs, and culinary programs at New Community Kitchen.



Images: Chilko Lake Lodge (top) <http://chilkolakelodge.com>
Friends of Nemiah Valley (bottom) <http://www.fonv.ca/nemaiahvalley>

A full listing of Aboriginal Tourism development opportunities in the Cariboo Chilcotin Coast and Vancouver Island regions is located in APPENDIX A.

3.0 TRANSPORTATION INFRASTRUCTURE and COMMUNITY TOURISM DEVELOPMENT

The relationship between the transportation infrastructure and tourism development can be best described as *interdependent* and *incremental*.

In terms of *interdependence*, growth in any region's tourism sector is directly dependent upon the ability to supply visitors to and from the destination's attractions in a manner that is convenient, comfortable, and cost-effective. In turn, the ability to sustain transportation services in a cost-effective and financially viable manner is dependent upon the ability of destinations to stimulate demand and ridership from both domestic and international visitors.

In terms of *incrementality*, growth in visitation for a destination that is in the early stages of tourism development must be facilitated by an adequate base level of transportation infrastructure from/to major source markets. More importantly for small / rural destinations with limited air connectivity, they must be located along popular travel routes, such as BC's many well-established Circle Routes.

For isolated coastal regions such as the Coast-Chilcotin and North Island, ferry services play the single most important role in facilitating development of the visitor economy.

3.1. Literature Review – Central Coast / North Island Ferry Services and Tourism Development

In the past three years, a number of reports have been developed related to ferry services in the region and tourism development potential.

In Fall 2014 AtBC, with support from the Province of British Columbia, commissioned a report by Wave Point Consulting and Left Coast Insights to identify the tourism potential and ferry development considerations for the region.

The report examined the tourism growth potential, key markets, and unmet demand for tourism, and identified ferry services that could be developed to support this demand. In general, it concluded that the **market demand is very high for the types of products and experiences offered in the region.**

Additional key findings from this report, as well as reports produced by the West Chilcotin Tourism Association and Tourism Industry Association of BC, include the following:

3.1.2. Reliance on Ferry Services

- Ferry services are critically important to the region, with 80% of visitors to the region using the ferry service;
- Opportunities exist to stimulate ferry ridership by engaging more proactively in co-operative marketing and ferry ticket wholesaling;
- The region's dominant inbound market is European in origin, with top markets being Germany,

France, the UK, and the U.S. Pacific Northwest;

- In recent years the market has shifted toward independent travellers rather than organized group tour, with 80% being leisure travellers (the other 20% visiting friends and relatives, and business); however, most travellers pre-book the ferry prior to departure from home.

3.1.3. Tourism Development Opportunities and Considerations

- There is significant unmet demand and growth potential for the region's products and experiences, particularly with key international markets;
- International visitors have higher expectations of convenience and comforts, including lower tolerance for unnecessary layovers and inconvenient service connections;
- Route continuity and avoidance of backtracking is paramount, with experience clusters needing to seamlessly connect along the touring route (Rocky Mountain experience, Chilcotin Plateau experience, Great Bear Rainforest Experience, Island(s) Experience), Urban Experience).

3.1.4. Service Capacity

- The multi-purpose nature of the service, requiring adequate capacity for cargo, freight, goods, local residents, and tourists, requires loading space for the following:
 - Regular oversized 53-foot domestic truck trailers from Port Hardy to Shearwater;
 - Regular commercial vehicles for Heiltsuk First Nation fish plant in Bella Bella;
 - Full sized passenger motor coaches (buses) for group tours;
 - Oversized recreational vehicles;
 - Standard sized automobiles;
 - Walk-on passengers;
- The multi-purpose nature of the service results in scheduling compromises capacity shortfalls, historically limiting economic opportunities for the most profitable segment: the direct, tourist-oriented seasonal service between Port Hardy and Bella Coola.

3.1.5. Routing, Logistics, and Governance Models

- Viability of the service is dependent on sailing origin and destination "anchor" communities with sufficient resident and visitor populations to drive overall demand for the service;
- The service is characterized by high peak volumes and a short operating season, with 70% of annual traveler volumes occurring from May 1 to Sept 30 (using the full-year Route 10 service as a proxy);
- There is a need for long-term service certainty beyond the current four-year performance term;
- To better manage the visitor experience, regular tracking and public reporting of customer satisfaction data should be undertaken;
- Significant opportunities emerge with the development of a standardized fleet and interoperability of vessels, enabling the addition and reduction of capacity as dictated by consumer demand.

These key findings in the literature were reviewed by the Committee and used to develop initial recommendations on ways to optimize tourism opportunities in the region, aligned with the interests and mandates of BC Ferries and the Government of British Columbia.

4.0 COMMITTEE RECOMMENDATIONS – SUPPORTING the VISION

The Committee held four meetings to discuss opportunities to strengthen and diversify communities in the Central Coast / North Island region, using information from the above-mentioned reports to guide our discussions.

Various options were discussed and debated, and preliminary consensus-based recommendations produced, which are summarized in this section.

The recommended solutions are designed to address the needs and stated objectives of all relevant groups, including but not limited to:

- Federal and provincial authority interests in sustainable economic development and First Nations community support;
- BC Ferries' mandate to operate in a financially responsible and viable manner with performance measures such as farebox recovery rates and per-passenger subsidies;
- Local and regional government, including First Nation government interests in providing sustainable economic development opportunities that aligned with the social and environmental objectives of their residents; and
- Tourism businesses and agencies that wish to grow revenues through responsible, coordinated destination development, management, and marketing.

4.1. Coordinated Tourism Development Planning

Discussion

- The potential opportunities for this region are significant but complex, requiring coordinated efforts among numerous partners (all three orders of government and in diverse agencies, First Nations communities, BC Ferries, tourism businesses, marketing organizations) – and this Committee's success can provide the framework for such positive and proactive collaboration in the future;
- Notable recent progress has been made in updating product and experience inventories for the region(s);
- Resources are available to support destination development planning through Destination BC;

Recommendations

1. That representatives from this Committee and MJTSD support proposals for the Central Coast and North Island regions in the forthcoming May 2016 Destination BC Expression of Interest process to develop Regional Destination Development Plans; this report can be used as a launching platform for this process.

2. That the Destination Development Plan(s) estimate the demand for tourism in the region, in order to inform potential ferry capacity needs and optimal service routing.

4.2. Destination Marketing

Discussion

- The Committee recognizes that significant opportunities exist to enhance the marketing of the Central Coast / North Island region, particularly in light of the recent establishment and branding of the Great Bear Rainforest;
- The provincial destination marketing system has been reconfigured to specifically support regional and sector clusters such as the Great Bear Rainforest and Aboriginal Tourism, through a competitive bid process related to co-operative marketing;
- This Committee possesses the required expertise, networks, and distribution channels to support enhanced destination marketing for the region;
- Recognizing the lack of resources for marketing BC Ferries services, the BC Ferry Commissioner in a 2012 Review of the Coastal Ferry Act recommended that municipal and regional governments be granted authority to levy additional surcharges to support route marketing, similar to the Municipal and Regional District Tax (MRDT – or “hotel tax”).

Recommendations

3. That the Cariboo Chilcotin Coast Tourism Association (CCCTA), Aboriginal Tourism BC, and Tourism Vancouver Island (TVI) be tasked to lead efforts for co-operative marketing. Working backwards from a summer 2018 anticipated new vessel deployment for the Central Coast, marketing would occur in early to mid 2017, requiring applications to be submitted to Destination BC by December 2016.

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
Presentations of provincial plans																		
		Applications																
			Review															
			Approval															
							Funding Provided											
							Campaigns											

4. That MJTSD and MoTI consider the advice of the BC Ferry Commissioner to establish a voluntary additional levy to enhance marketing of B.C. Ferries routes, similar to the MRDT.

5. That MJTSD, Destination BC, MoTI, and BC Ferries evaluate ways to further integrate branding opportunities for the region and related services that leverage emerging regional brands, particularly the Great Bear Rainforest (see below).

Figure 10: Conceptual Ferry Branding Tie-in to Aboriginal Tourismⁱⁱ



4.3. Re-establishing a Separate, Direct Port Hardy to Bella Coola Route

Discussion

- In order to stimulate and support substantial increases in tourism demand for the Central Coast / North Island region, an adequate “feeder” network is required;
- Prior research clearly demonstrates that ferry volumes are dependent on “anchor” origins and destinations with adequate populations (resident and/or visitor);
- The only direct, daylight service that operated previously between Port Hardy and Bella Coola aboard the MV Queen of Chilliwack averaged over 80 vehicles per sailing during the 2013 operating season, with higher volumes likely during peak years of the service;
- With an increased overall level of visitors to the region, opportunities emerge to better distribute benefits to all communities in the region, via a sub-regional hub-and-spoke distribution model out of Bella Coola, with additional smaller hubs possible in Port Hardy and Bella Bella;
- With vessel standardization and interoperability, a second vessel could be deployed during the off-peak season to provide essential winter backup service for the southern routes for vessel maintenance.

Recommendations

6. That MoTI, MJTSD and the Committee commit to evaluating the potential demand for a two-ferry solution in the Central Coast / North Island region, and if sufficient tourism demand can be demonstrated, that MoTI consider amending the Coastal Ferry Services Contract to *enable* a direct Port Hardy – Bella Coola sailing for the 2018 summer season;

7. That MoTI, BC Ferries and the Committee work to identify potential route configuration options to maximize ridership on each route, with clear, independent performance targets for capacity utilization on each route used as targets for tourism demand stimulation;

4.4. Vessel Selection and Procurement

Discussion

- Vessel capacity requirements depend on performance objectives for the service, government subsidy levels, route configuration, and sailing frequency;
- If a government objective is to support community development and the economic viability of the Central Coast, then overall capacity should be sufficient to support these objectives;
- Currently, capacity is constrained by the need to serve multiple functions in the region with a single vessel, including providing basic transportation services for residents, transporting goods and cargo/freight throughout the region, and providing adequate capacity for peak season tourism volumes to support much-needed economic development in the region;
- All stakeholders recognize that the MV Nimpkish is considerably under-sized with respect to the current demand for passenger and cargo/freight space;
- Conversely, during high load sailings (>70%) of the MV Queen of Chilliwack, visitor volumes outstripped the hospitality capacity in both Bella Coola and Port Hardy;
- The Committee recognizes the need for BC Ferries to maximize its financial viability and for MoTI to limit taxpayer support levels, within reason;
- Capacity should meet current needs, and be scalable to add/reduce capacity with changes in the operating environment;
- With vessel standardization and interoperability, options emerge for deploying excess capacity elsewhere if the demand does not materialize, limiting financial risk exposure of BC Ferries, MoTI, and B.C. taxpayers;
- The Government of Canada has identified transportation infrastructure as a priority to stimulate economic development, pledging \$60 billion in new infrastructure funding over ten years;
- The Government of BC has engaged in discussions with the Government of Canada regarding the eligibility of coastal ferries for infrastructure spending;
- New incremental ferry capacity developed specifically to support regional economic development, particularly in First Nations communities, and supported by a comprehensive, multi-stakeholder development and marketing plan, would likely be a strong candidate for federal funding; prior federal investments in the Klemtu port serves as precedent.

Recommendations

8. That the Province of BC and this Committee jointly approach the Government of Canada with a proposal to finance a second small-class (~50 AEQ) vessel for deployment in the Central Coast region;
9. That MoTI and MJTSD commit to deploying two small-class vessels in the region as a three-to-five (3-5) year pilot project, and with a decision being made that provides adequate lead times for Rendezvous Canada in May 2017 (for wholesalers to sell the 2018 summer season).

4.5. Plan Execution

Discussion

- Significant progress has been achieved on this complex issue through ongoing dedication of Committee members;
- Government support of this Committee's work, financially and through discussion of the recommendations in this report, further strengthen the resolve to develop workable solutions for all relevant stakeholders;
- This initial suite of recommendations provides a solid foundation for taking concrete steps forward, and/or identifying obstacles to the initial recommendations.

Recommendations

10. That MJTSD review the report and respond to recommendations within thirty (30) days;
11. That MJTSD, MoTI, the Committee, and other stakeholders, upon accepting this report's recommendations, work in partnership to establish a Work Plan to support our joint Vision.

APPENDIX A: Cariboo Chilcotin Coast Aboriginal Tourism Opportunities

Community	Community Engagement	Access/Infrastructure	Product Development	Capacity Building	Marketing/Promotion
?Esdilagh - Alexandria Band	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	TBD	TBD - could participate in Williams Lake Product Cluster and Gold Rush/Spirit Trail Themed Route' Gold Rush Snomobile Trail Themed Route; BC Circle Routes	TBD	TBD
St'uxwtews - Bonaparte Indian Band	Community engagement to educate and build support for development of an Aboriginal tourism economy including development of cultural sharing protocols	Leverage existing infrastructure - Hat Creek Ranch; Upgrades to pow-wow grounds and harbour	Short-term - enhance cultural programming at Hat Creek Ranch; Longer term: Gold Rush/Spirit Trail Themed Route; BC Circle Routes, Calgary/Vancouver Touring Route: Create destination for touring travelers between Calgary and Vancouver and on the Gold Rush/Spirit Trail including overnight accommodation, campground, cultural programs, guided hiking, trail riding	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Branded with Gold Rush/Spirit Trail and with Calgary/Vancouver touring route; market Traditional Village together with Xat'súllil/Xwisten experiences as part of a collection of Aboriginal experiences along a themed route and in partnership with TOTA/CCCTA/VCM and AtBC
Xwisten - Bridge River Indian Band	Community engagement has already occurred and continues as necessary	Potable water supply to Bearclaw Grill; retaining wall at fishing grounds; signage; St'at'imc Cultural Centre	Lillooet Product Cluster: Overnight accommodation in pithouse; elevated walkway around archaeological site; restoration of log homes/church on old village site; trail systems connecting archaeological site, old village site and fishing grounds	Need a dedicated tourism manager; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Short term need for website development/professional photography and videography; Branded with the collection of Aboriginal experiences around Lillooet; market in partnership with District of Lillooet, AtBC and VCM/CCCTA

Stswecem'c Xgat'tem First Nation - Canoe Creek/Dog Creek	Community engagement to educate and build support for development of an Aboriginal tourism economy including development of cultural sharing protocols	Signage; public washrooms; Visitor Information/welcome kiosk; Northern Secwepemc Cultural Centre; additional infrastructure to support overnight stays at Churn Creek Protected Area	Themed Route: Fraser River Themed Route; Williams Lake Product Cluster; Northern Secwepemc Product Cluster; Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes: Improvements to local store; restoration of old village site; guided interpretive tours to Churn Creek and area overnight accommodation at Churn Creek Protected Area	Cultural interpretation training; Business Development training; Participation in regional capacity building strategy as appropriate	Branded with Gold Rush/Spirit Trail themed route; with Fraser River Themed Route; with Northern Secwepemc communities; market in partnership with CCCTA and AtBC
Sekw'el'was - Cayoose Creek Band	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	St'at'imc Cultural Centre	TBD - could participate in Lillooet Product Cluster; Gold Rush/Spirit Trail Themed Route; Fraser River Themed Route Themed Route	TBD	TBD
Esk'etmc First Nation - Alkali Lake Band	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	Northern Secwepemc Cultural Centre at 108 Mile Heritage Site	Fraser River Themed Route; Northern Secwepemc Product Cluster; Williams Lake Product Cluster; Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Branded with Gold Rush/Spirit Trail themed route; with Fraser River Themed Route; with Northern Secwepemc communities; market in partnership with CCCTA and AtBC
Ilen-Ileney'ten - High Bar First Nation	Community engagement to educate and build support for development of an Aboriginal tourism economy including development of cultural sharing protocols	Family/Community Gathering Place; renovations of old church for possible Visitor Info Centre; leverage existing infrastructure in Clinton	Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes; Guided interpretive tours; traditional plants/medicine growing;	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Branded with Gold Rush/Spirit Trail Themed Route; market in partnership with CCCTA and AtBC
Lhtako Dene - Red Bluff	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	TBD	TBD- could participate in Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes	TBD	TBD

Tsal'ah - Seton Lake	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	St'at'imc Cultural Centre	TBD - could participate in Lillooet Product Cluster	TBD	TBD
T'it'q'et - Lillooet	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	St'at'imc Cultural Centre; possible Visitor Centre at Lillooet/Whistler junction; signage	Lillooet Product Cluster; Gold Rush/Spirit Trail themed route; Fraser River Themed Route; BC Circle Routes; short term opportunity to feature local artists' and their work in lobby of Retasket Lodge; longer term opportunity to expand number of rooms/rv sites	Need a dedicated tourism manager; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Branded with Lillooet product cluster and part of themed routes (Gold Rush/Spirit Trail and Fraser River Themed Route); market in partnership with VCM/CCCTA, AtBC and with District of Lillooet/Regional District
Ts'Kw'aylaxw First Nation - Pavillion	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	St'at'imc Cultural Centre	TBD - could participate in Lillooet Product Cluster; Gold Rush/Spirit Trail Themed Route; Fraser River Themed Route; BC Circle Routes	TBD	TBD
Tsq'escen' - Canim Lake Band	Community has developed a tourism plan and support for implementation is in place	Bob's Lake trails master plan/trail development including improved road access to lake, cabins, water, sanitary services; PowWow site development including sanitary services, overnight pithouse accommodation, cultural facility, parking, camping, signage; Lodge development; presence in Clearwater Visitor Centre in partnership with Simpcw First Nation	Destination Potential; Northern Secwepemc Product Cluster; Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes; short term opportunities include development of Bob's Lake trails/recreation site; canoe rentals on Canim Lake; Broken Rock tours; Unity ride experiences for visitors; longer term opportunity for lakefront lodge development and agri-tourism	Cultural interpretation training; Business Development training; Participation in regional capacity building strategy as appropriate	Branded with Gold Rush/Spirit Trail themed route and eventually as a destination Lodge; market in partnership with CCCTA and AtBC

T'exelc - Williams Lake Indian Band	Community engagement has already occurred and continues as necessary	Conference centre/community meeting place; Northern Secwepemc Cultural Centre; potential hotel/food service, retail and grocery development along the Highway	Williams Lake Product Cluster; Northern Secwepemc Product Cluster; Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes ; short term opportunity to develop guided interpretive tours (Flat Rock/Moose Meadow) leaving from Coyote Rock Golf Course and Chief Will-Yum Campsite; longer term opportunity for hotel development	Need a dedicated tourism manager; ongoing capacity building to support existing and proposed visitor experiences. Participation in regional capacity building opportunities as appropriate	Branded with Gold Rush/Spirit Trail Themed Route and with Williams Lake and Northern Secwepemc Product Clusters; market in partnership with Williams Lake, CCCTA, AtBC
Xat'súll First Nation - Soda Creek Band/ Cmetemc' - Deep Creek	Community is supportive of existing and proposed tourism opportunities; protocols for cultural sharing are in place.	Upgrades to Xat'súll Heritage Village; renovation and reopening of restaurant facility including area for displays of artwork; expansion of Whispring Willow Campground. In the longer term, Northern Secwepemc Cultural Centre proposed for 108 Mile Heritage Site	Northern Secwepemc Product Cluster/Williams Lake Product Cluster; Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route and Fraser River Themed Route; once restaurant reopens, additional culinary experiences and catering can be offered	Need a dedicated tourism manager; ongoing capacity building to support existing and proposed visitor experiences. Participation in regional capacity building opportunities as appropriate	Branded with themed routes (Gold Rush/Spirit Trail/Fraser River Themed Route) and as part of the Northern Secwepemc/Williams Lake Product Clusters; Continued marketing with CCCTA/AtBC/DBC/CTC;
Xaxli'p - Fountain	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	St'at'imc Cultural Centre; convenience store; possible lodge	TBD - could participate in Lillooet Product Cluster; Gold Rush/Spirit Trail Themed Route; Fraser River Themed Route; BC Circle Routes	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training; management training; Participation in regional capacity building opportunities as appropriate	Branded with Lillooet product cluster and part of themed routes (Gold Rush/Spirit Trail and Fraser River Themed Route); market in partnership with VCM/CCCTA and with District of Lillooet/Regional District
Stil'qw/pellt'iq't - Whispering Pines	To be included in Thompson Okanagan regional strategy as assets and experiences are located primarily in Kamloops today	To be included in Thompson Okanagan regional strategy as assets and experiences are located primarily in Kamloops today	Gold Rush/Spirit Trail Themed Route; Gold Rush Snowmobile Trail Themed Route; BC Circle Routes - most experiences are located near Kamloops but acknowledgement of traditional territory and participation in themed routes in traditional territory proximate to Clinton should be pursued	To be included in Thompson Okanagan regional strategy as assets and experiences are located primarily in Kamloops today	To be included in Thompson Okanagan regional strategy as assets and experiences are located primarily in Kamloops today

Lhoosk'uz Dene - Kluskus	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	Grease Trail clearing and maintenance; signage; public washrooms; overnight accommodation (possibly in pithouse)	Grease Trail Themed Route; longer term opportunity to develop overnight accommodation on the lake including guided cultural interpretation, fishing, hiking, trail riding	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Branded with Grease Trail Themed Route; market in partnership with CCCTA/AtBC
Nazko First Nation	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols		Grease Trail Themed Route; Gold Rush/Spirit Trail Themed Route; short term opportunity to develop cultural programs for Rocky Mountaineer passengers arriving in Quesnel; longer term opportunities for guided tours to Blackwater River and to access Grease Trail	Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Brand with Grease Trail Themed Route; In short term promote direct to Rocky Mountaineer passengers and in partnership with CCCTA, AtBC
Tl'etinqox-T'in Government Office - Anaham Band	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	Enlarge/replace gas bar/store; welcoming community poles and signage; community based food services; additional public washrooms; potential Lodge acquisition	TBD - could participate in Williams Lake Product Cluster/Highway 20 Themed Route; BC Circle Routes; short term opportunity to promote two local guide outfitters and offer guided wildlife, photography tours; opportunity to include visitors in Unity Ride; longer term consideration of Lodge acquisition if feasible	Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Market in partnership with Highway 20 Collection/CCCTA/AtBC
Tl'esqox - Toosey	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	TBD	TBD - could participate in Williams Lake Product Cluster and Highway 20 Themed Route; BC Circle Routes	TBD	TBD
Tsi-del-del First Nation - Red Stone Band	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	TBD	TBD - could participate in Williams Lake Product Cluster and Highway 20 Themed Route; BC Circle Routes	TBD	TBD

<p>Ulkatcho First Nation - Anahim Lake Band</p>	<p>Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols</p>	<p>Reopen gas bar along the Highway including space for artisan displays, Visitor Information; Gatcho Lake Visitor Centre and overnight accommodation; trail planning/development to connect to Grease Trail and to access Tanya Lakes; additional food service/restaurant facilities; cabins and camping facilities</p>	<p>Grease Trail Themed Route; Highway 20 Themed Route; BC Circle Routes; In short term Partner with non-Aboriginal operators - include cultural interpretation in their offerings with Ulkatcho staff/contractors; longer term opportunity to develop Grease Trail experiences; hikes to Tanya Lakes, Gatcho Lake Village Site tours/overnight accommodation; additional cabins/camping sites</p>	<p>Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate</p>	<p>Branded with Grease Trail Themed Route; market in partnership with West Chilcotin Tourism Association; CCCTA; AtBC and Highway 20 experiences</p>
<p>Xeni Gwet'in First Nation Government - Nemiah Valley</p>	<p>Community has developed a tourism plan and support for implementation is in place</p>	<p>Air strip improvements considered essential; access management into XGCA remains priority to minimize road building and associated public use; possible Lodge development on Chilko Lake</p>	<p>Desitnation Potential; short term opportunity to refine cultural programs for wild horse viewing, botanicals and build non-Aboriginal Lodge operator confidence to pre-sell to their guests; continued programming at Traditional Village; overnight stays in pithouse; Healing Centre programs; culinary programs at new Community Kitchen</p>	<p>Continue investments in capacity building and ensure trainees/entrepreneurs are pre-sold through Lodge partners</p>	<p>Promote Xeni Gwet'in brand and positioning as defined in partnership with CCCTA/DBC/CTC/AtBC</p>
<p>Yunesit'in Government - Stone Indian Band</p>	<p>Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols</p>	<p>Stable; artisans area</p>	<p>Williams Lake Product Cluster and Highway 20 Themed Route; BC Circle Route; short term opportunity to develop a guided trail ride between communities of Yunesit'in and Xeni Gwet'in</p>	<p>Need a tourism champion; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate</p>	
<p>Nuxalk Nation - Bella Coola</p>	<p>Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols</p>	<p>Maintenance of BC Ferries, Pacific Coastal schedules at reasonable cost is a priority; welcome kiosk at ferry terminal; Nuxalk longhouse construction; cabins throughout the territory</p>	<p>Destination Potential; Coastal BC Product Cluster/Great Bear Rainforest Themed Route and Lodge Collection; Grease Trail Themed Route; Highway 20 Themed Route; BC Circle Routes; Short term opportunities include guided hikes with cultural interpretation (petroglyphs, big cedar); grizzly bear viewing; possible lodge acquisition on Dean River; possible B&B acquisition; multi-day itineraries along Grease Trail to Ulkatcho territory</p>	<p>Need a dedicated tourism manager; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate</p>	<p>Brand visitor experiences when developed under Great Bear Rainforest and Grease Trail Themed Route; market in partnership with CCCTA/AtBC</p>

Heiltsuk Nation - Bella Bella	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	Maintenance of BC Ferries, Pacific Coastal schedules at reasonable cost is a priority; Heiltsuk Bighouse construction	Destination Potential; Coastal BC Product Cluster/Great Bear Rainforest Themed Route and Lodge Collection; Short term opportunities include partnership with Shearwater Resort and guided tours into Hakai Luxvbalis Conservancy, bear viewing, trade routes; longer term development of Lodge experience	Short term capacity building needed to support 2014 Tribal Journeys; Need a dedicated tourism manager; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Brand under umbrella of Great Bear Rainforest; market in partnership with CCCTA/AtBC/DBC/CTC
Kitasoo/Xaixais - Klemtu	Community engagement has already occurred and continues as necessary	Maintenance of air schedule to Bella Bella at reasonable cost;	Destination Lodge; Coastal BC Product Cluster/Great Bear Rainforest Themed Route and Lodge Collection - no further product development at this time	Participation in regional capacity building strategy offering potential internships and front-line training	Brand under umbrella of Great Bear Rainforest; market in partnership with CCCTA/AtBC/DBC/CTC
Wuikinuxv Nation - Oweekeno	Further dialogue with community to determine tourism objectives and priority opportunities; community engagement to educate and build support for development of an Aboriginal tourism economy including cultural sharing protocols	Expansion of techno lodge; grocery store and restaurant; maintenance of carrier schedules at reasonable cost; scheduled BC Ferries service desired	Destination Potential; Coastal BC Product Cluster/Great Bear Rainforest Themed Route and Lodge Collection; Short term opportunities include guided hikes with cultural interpretation (CMT's archaeological sites), grizzly bear viewing; longer term development of lodge and/or participation in pocket cruise ship-based experiences along the Coast.	Need a dedicated tourism manager; Capacity building and training specific to new product development including front-line service training, cultural interpretation training, management training; Participation in regional capacity building opportunities as appropriate	Brand visitor experiences when developed under Great Bear Rainforest collection

APPENDIX B: Vancouver Island Aboriginal Tourism Opportunities

1. Grease Trail Guided Interpretive Camping/Hiking Experiences ('Namgis)
2. T'sasala Dance Group ('Namgis)
3. Guided Tours and camping (Da'naxda'xw)
4. Moorage/hiking on Hope Island (Tlatlasikwala)
5. Grizzly bear viewing, Phillips River Ecological & Cultural Tour (Kwiakah)
6. Grizzly bear viewing (Homalco)
7. Fishing lodge/fishing charters (Ka:'yu:'k't'h'/Che:k:tlles7et'h')
8. Rustic cabins and campsites/moorage at Yuquot (Mowachaht/Muchalaht)
9. Hot Springs Lodge (Hesquiaht)
10. Campground near Hot Springs/Hot Springs hiking trail (Hesquiaht)
11. Hooksum Outdoor School (Hesquiaht)
12. Cooper Moon Adventures (Hesquiaht)
13. Bernard's B&B (Hesquiaht)
14. Walk the Wild Side Trail (Ahousaht)
15. Spirit Eagle Aboriginal Tours (Ahousaht)
16. Madison Fishing Charters (Ahousaht)
17. Aauuknuk Lodge (Ahousaht)
18. Meares Island Canoe Tour (Tla-o-qui-aht)
19. Secret Beach Campground (Toquaht)
20. Henderson Lake Lodge (Uchucklesaht)
21. Market/café/moorage (Huu-ay-aht)
22. Pachena Bay Campground (Huu-ay-aht)
23. Nitinat Lake Motel (Ditidaht)
24. Windsurfers' Park Camping (Ditidaht)
25. West Coast Trail Comfort Campsites (Ditidaht)
26. Salmon BBQ's with the Edgar family (Ditidaht)
27. Pacheedaht Beach and Rainforest Campground (Pacheedaht)
28. Moorage (Pacheedaht)
29. Tsheshat Market/Gas Station/Totem Pole Garden (Tseshah)
30. Choo Kwa Ventures/Choo Kwa Gift Shop (Hupacasath)
31. Wooden canoe tours (Wei Wai Kum)
32. Wei Wai Kai Campground/Raving Raven food kiosk (Wei Wai Kai)
33. Qualicum First Nation Campground (Qualicum)

34. Campground (Snaw-naw-as)
35. Song and dance group (Snaw-naw-as)
36. Newcastle Island Marine Provincial Park (Snuneymuxw)
37. Campground/yurts (Lyackson)
38. Penelakut Artists' Co-op (Penelakut)
39. Skutz Falls Camping (Cowichan Tribes)
40. Cowichan Totem Tours (Cowichan Tribes)
41. Songhees Wellness Centre, Victoria (Songhees)
42. One Moon Gallery (Esquimalt)
43. Beecher Bay Marina (Scia'new)

Strategy/ Community	Tier 1	Tier 2	Tier 3
Gwa'sala-'Nakwaxda'xw			✓
Kwakiutl	✓		✓
Quatsino	✓		
'Namgis	✓	✓	✓
Tlatlasikwala	✓		
Kwicksutaineuk/Ah-Kwa-mish	✓		
Mamalilikulla-Qwe'Qwa'Sot'Em	✓		✓
Wuikinuxv	✓		
Da'naxda'xw	✓	✓	
Dzawada'enuxw	✓		✓
Gwawaenuk	✓		
Tlowitsis	✓		
Kwiakah		✓	
Homalco	✓	✓	

APPENDIX C: POTENTIAL TOURISM DEMAND ESTIMATES AND ECONOMIC IMPACTS

As part of the working group’s deliberations, estimates of potential tourism demand and economic impacts were produced.

These are preliminary estimates only, and should be used as a general guide for discussions and future demand analysis regarding tourism opportunities.

The estimates were produced with a three-stage Delphi Method forecasting method, which is considered a reliable way to produce reasonable “directional” estimates in a short timeframe. These estimates should be refined with a more robust demand forecast process guided by Destination BC.

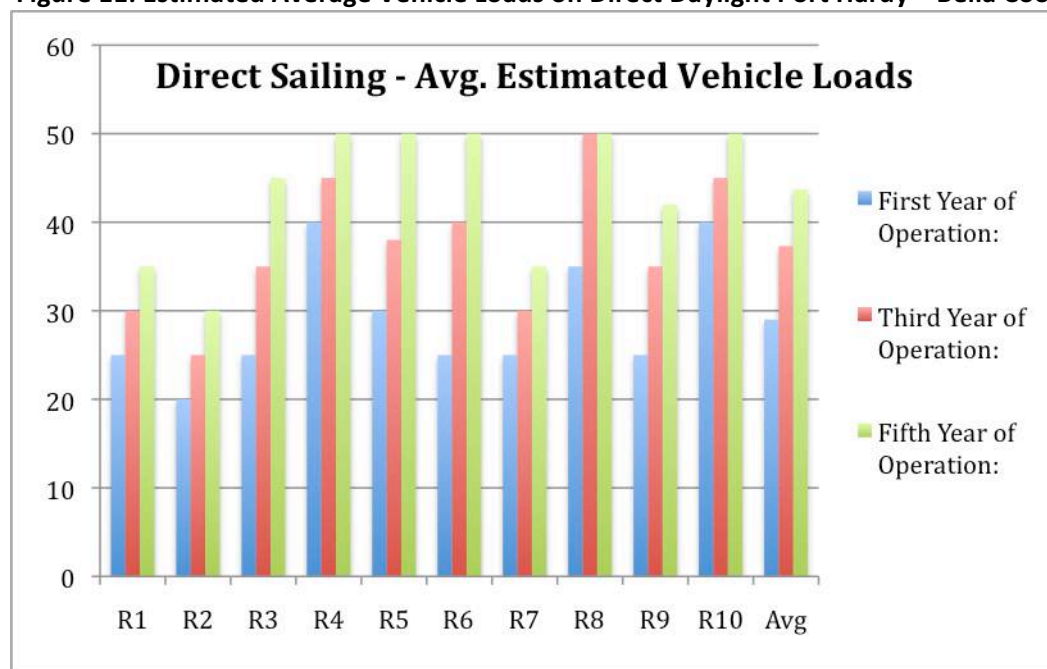
The estimates were produced under the assumption that the service specifications identified in Section 4 of this report were put into practice, including operation of two small-class vessels for the region over an extended operating season, and with supporting destination development and marketing initiatives.

Committee members and two anonymous “control” respondents with no vested interest in the service were asked to respond to questions related to the following areas.

5.1. Direct Sailing Vehicle Load Estimates

Respondents were asked to estimate the expected vehicle loads on a reintroduced direct daily service between Port Hardy and Bella Coola with 50-55 vehicle capacity.

Figure 11: Estimated Average Vehicle Loads on Direct Daylight Port Hardy – Bella Coola Route



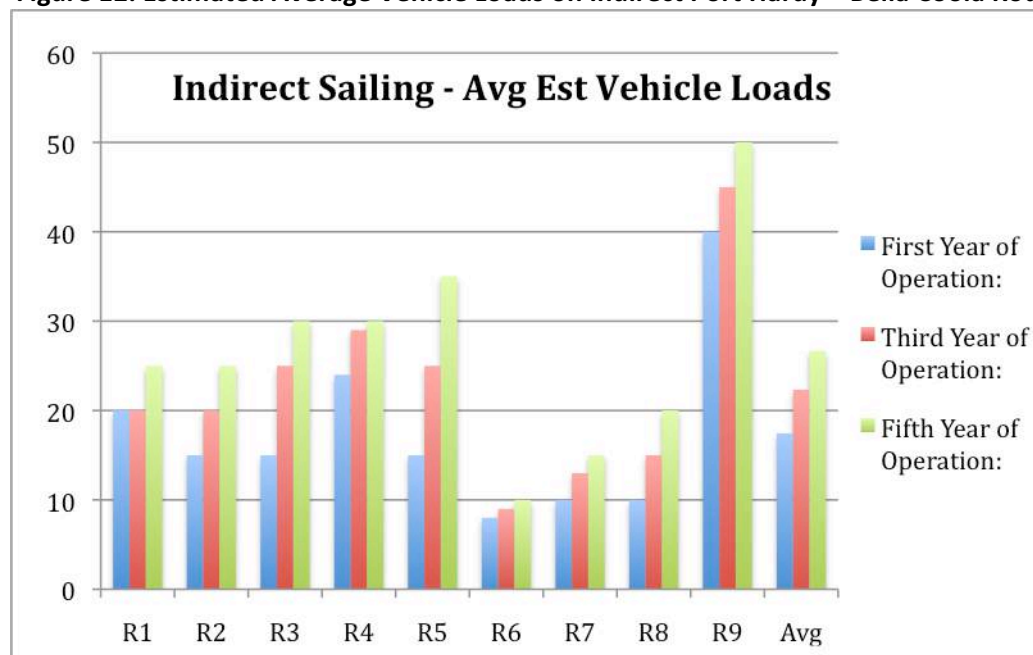
One notable result of this question is that respondents hold quite similar perspectives on the expected vehicle loads for the route, with all but one response falling within one statistical standard deviation of the mean. Respondents estimate the expected vehicle loads for this route to be quite high, with the year-5 estimate being approximately 80% capacity utilization over the operating season, assuming a 50-55 vehicle (AEQ) vessel capacity with six (6) direct daylight sailings per week.

5.2. Indirect Sailing Vehicle Load Estimates

Results for the same question asked about an indirect sailing with multiple stopovers have a higher degree of variance than results for the direct sailing. This variance is likely the result of uncertainty regarding specific route logistics and tourism product development uncertainties.

However, as *Figure 12* demonstrates, the average estimated load is approximately 50% during the proposed May-Oct operating season, which would be comparable with many minor routes in the BC Ferries system.

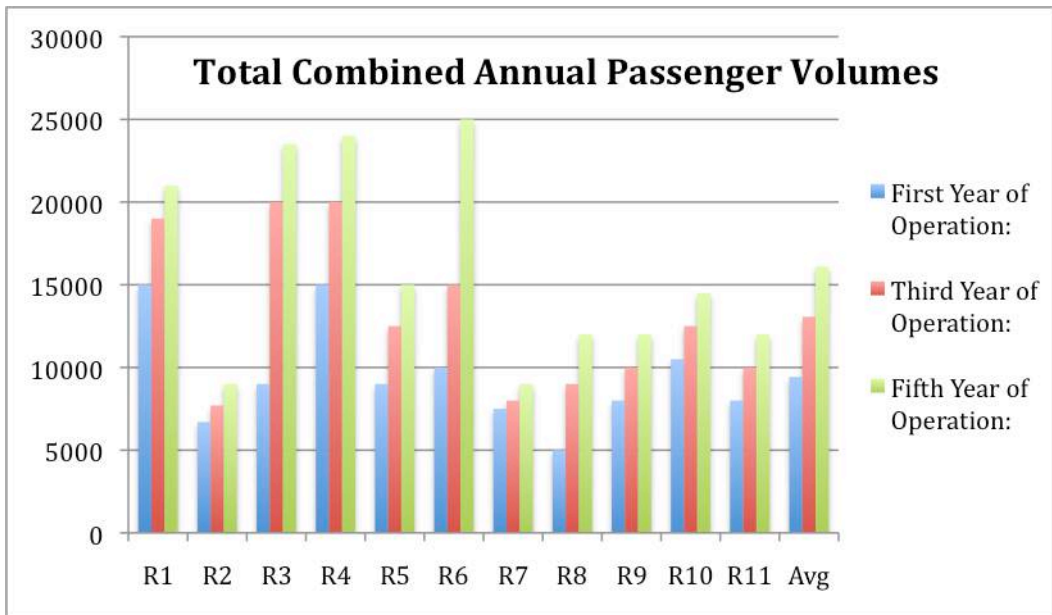
Figure 12: Estimated Average Vehicle Loads on Indirect Port Hardy – Bella Coola Route



5.3. Total Estimated Annual Passenger Volumes

Results for the estimated annual passenger loads had intermediate variance.

Figure 13: Total Estimated Annual Passenger Volumes – Direct and Indirect (PH-BC)



One notable trend is that the estimates of vehicle loads from the first two questions, if annualized, correspond more closely with the relatively higher estimates, as an annualized combined average capacity utilization of 65% (direct and indirect) is approximately 20,000 annual passengers.

Removing responses that vary more than one standard deviation from the mean results in an average total combined annual passenger volume of 14,400. This represents a 44% increase in total passengers relative to the prior peak of approximately 10,000. This could be considered a realistic, if aggressive target in light of the proposed extended season for the direct sailing, overall increased capacity with two vessels, modernized amenities, and most importantly, comprehensive and coordinated destination development and marketing activities.

5.4. Estimated Impacts on Tourism and Aboriginal Tourism

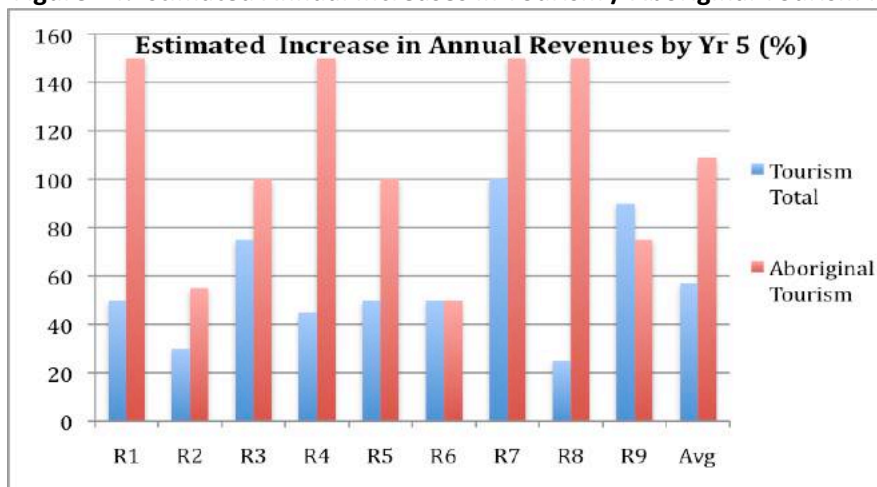
Results had intermediate variance for the estimated increase in annual Aboriginal tourism and overall tourism after five years of operation of the new, enhanced service. Three responses were beyond one standard deviation of the mean for total tourism revenues, while two responses were beyond one standard deviation for Aboriginal tourism revenues.

Not surprisingly, Aboriginal tourism is estimated to grow more rapidly than the overall tourism sector for the region. This is due to the rapid rate of growth of Aboriginal tourism in recent years, combined with the overall low level of current development of Aboriginal tourism for the study region, and current momentum to develop a number of Aboriginal tourism products, experiences, and destinations. Recent announcements regarding the Great Bear Rainforest

may also account for **Aboriginal tourism being projected to grow by over 100%** (doubling) in the five-year period.

Annual revenues for the total tourism sector for the region (roughly between, but not including Campbell River and Williams Lake) are estimated to grow at a slower, but nonetheless rapid rate of **nearly 60% within five years**.

Figure 14: Estimated Annual Increases in Tourism / Aboriginal Tourism in Five Years



5.5. Estimated Economic Impacts

Using estimates produced by the Delphi forecasts above, we can develop reasonable estimates of economic impacts for the study region, using known travel patterns and expenditure levels.

Using data from a 2009 PKF Consulting reportⁱⁱⁱ for Go RVing, we can estimate the average daily expenditures of self-drive “touring” travellers, which constitute the majority of visitors to the region. These data can then be combined with typical regional travel itineraries and Statistics Canada’s Input-Output Model to determine overall economic impacts, as the following tables demonstrate.

To determine the total number of incremental tourists in the region, we can remove the outlier responses, and then subtract the most current year of known passenger volumes in the region.

Table 2: Lower Rang Traveller Estimates

	Lower Range	Upper Range
Year-5 Avg Projected Visitors (outliers removed):	14,417	14,417
Minus/Plus One St. Dev.	-3,500	+3,500
Total Lower Range Travellers	10,917	17,917

From this we can then apportion the travellers according to their market origins, based on passenger surveys from the region.

Table 3: Passenger Origins

Market Origin	LOWER RANGE		UPPER RANGE	
	Proportion	Number	Proportion	Number
Domestic	51%	6,248	51%	9,138
Int'l (incl. US)	32%	3,920	32%	5,733
<i>Local Resident</i>	<i>17%</i>	<i>2,083</i>	<i>17%</i>	3,046
TOTAL (non-res)	83%	10,168	83%	14,871

We then estimate the expenditures of these travellers in various sub-regions as follows, based on typical travel itineraries:

Table 4: Direct Tourist Spending in Region – Lower Range

	Visitors	Avg. Duration In-Region	Avg. Daily Expenditures	Travel Party Size	Total Expenditures
Cariboo (domestic)	5,568	1.5	\$142.50	2.0	\$595,080
Cariboo (int'l)	3493	1.5	\$224.00	2.0	\$586,824
Chilcotin (domestic)	5,568	1.5	\$142.50	2.0	\$595,080
Chilcotin (int'l)	3493	1.5	\$224.00	2.0	\$586,824
Coast (domestic)	5,568	2.5	\$142.50	2.0	\$991,800
Coast (int'l)	3493	2.5	\$224.00	2.0	\$978,040
North Island (domestic)	5,568	2	\$142.50	2.0	\$793,440
North Island (int'l)	3493	2	\$224.00	2.0	\$782,432
TOTAL					\$5,909,520

Table 5: Direct Tourist Spending in Region – Upper Range

	Visitors	Avg. Duration In-Region	Avg. Daily Expenditures	Travel Party Size	Total Expenditures
Cariboo (domestic)	9,138	1.5	\$142.50	2.0	\$976,624
Cariboo (int'l)	5733	1.5	\$224.00	2.0	\$963,144
Chilcotin (domestic)	9,138	1.5	\$142.50	2.0	\$976,624
Chilcotin (int'l)	5733	1.5	\$224.00	2.0	\$963,144
Coast (domestic)	9,138	2.5	\$142.50	2.0	\$1,627,706
Coast (int'l)	5733	2.5	\$224.00	2.0	\$1,605,240
North Island (domestic)	9,138	2	\$142.50	2.0	\$1,302,165
North Island (int'l)	5733	2	\$224.00	2.0	\$1,284,192
TOTAL					\$9,698,839

Based on average visitor expenditure categories identified by Destination BC in its Value of Tourism Report, we can then “share” this information to the appropriate industries.

Table 6: Tourism Expenditure Categories (Industries)

LOWER RANGE			UPPER RANGE		
Spend Categories	Proportion	Amount	Spend Categories	Proportion	Amount
Accom / F&B	33.60%	\$1,985,599	Accom / F&B	33.60%	\$3,258,810
Transportation	31.30%	\$1,849,680	Transportation	31.30%	\$3,035,737
Retail	27.20%	\$1,607,389	Retail	27.20%	\$2,638,084
Other Services	7.90%	\$466,852	Other Services	7.90%	\$766,208
TOTAL	100.00%	\$5,909,520	TOTAL	100.00%	\$9,698,839

The final step is to convert these expenditures to “economic output” so that Statistics Canada’s Input-Output Model can be used to calculate total economic impacts.

Table 7: Total Economic Impacts – Lower Range

Total Impacts	Proportion	Revenues	Cons Tax	Output	Multiplier	Total Output
Accom / F&B	33.60%	\$1,985,599	14.0%	\$1,707,614.90	1.77	\$3,022,478.37
Transportation	31.30%	\$1,849,680	5.0%	\$1,757,195.77	1.94	\$3,408,959.80
Retail	27.20%	\$1,607,389	12.0%	\$1,414,502.71	1.76	\$2,489,524.76
Other Services	7.90%	\$466,852	5.0%	\$443,509.48	1.83	\$811,622.34
TOTAL		\$5,909,520		\$5,322,822.85		\$9,732,585.28

Table 8: Total Economic Impacts – Upper Range

Total Impacts	Proportion	Revenues	Cons Tax	Output	Multiplier	Total Output
Accom / F&B	33.60%	\$3,258,810	14.0%	\$2,802,576.52	1.77	\$4,960,560.44
Transportation	31.30%	\$3,035,737	5.0%	\$2,883,949.78	1.94	\$5,594,862.57
Retail	27.20%	\$2,638,084	12.0%	\$2,321,514.10	1.76	\$4,085,864.82
Other Services	7.90%	\$766,208	5.0%	\$727,897.87	1.83	\$1,332,053.10
TOTAL		\$9,698,839		\$8,735,938		\$15,973,341

As the above calculations show, the estimated economic impact of a coordinated approach to tourism development, marketing, and transportation infrastructure could yield between \$10 million and \$16 million per year for the study region.

APPENDIX D: INITIAL PROPOSED ROUTE CONFIGURATION RECOMMENDATIONS

Discussion

- The former direct daylight sailing between Bella Coola and Port Hardy had average capacity utilization of 37.5%, or approximately 45 vehicles per sailing during the 2012 season;
- The highest capacity utilization was for the indirect Saturday sailings of the same vessel out of Port Hardy, with 42.9% capacity utilization, or 51 vehicles per sailing on average in the 2012 season;
- With two vessels of approximately 50 AEQ capacity each, opportunities are opened to experiment with route configuration to better leverage recent and potential growth in the North Island and Central Coast region, potentially including ports of call within the Johnstone Strait and Salish Sea;
- With a differentiated service delivery model, making the excursion part of the destination attraction, a First Nations and ecotourism-themed service positioned as a mini cruise could significantly enhance demand and improve financial performance of the indirect service;
- A second vessel for the region, servicing the direct Port Hardy – Bella Coola route, could be redeployed as essential backup for the southern routes during the winter maintenance cycle;
- An expanded operating season with an optimized route configuration for the direct Port Hardy – Bella Coola service could significantly enhance the viability of specific business ventures that are seeking to expand operations into the shoulder seasons and perhaps year-round.

Recommendation

That BC Ferries, under direction from the BC MoTI, assess the feasibility of a pilot project to deploy two small-class vessels for the region, each with capacity for approximately 50 AEQs and 125 passengers, with the following specifications:

- Vessel 1 operating approximately six (6) weekly direct daylight sailings between Port Hardy and Bella Coola from Victoria Day (third weekend in May) to Thanksgiving (second weekend in October);
- Vessel 2 operating approximately six (6) weekly sailings servicing various ports of call in the region, including but not limited to Bella Bella, Shearwater, Ocean Falls, and possibly Klemtu;
- Continued calling of the Northern Expedition in Klemtu and Bella Bella;
- Consider alternative route configuration opportunities for the indirect service, to stimulate tourism-based traffic, particularly in the shoulder and low seasons, including but not limited to potential stops in the Shearwater, Ocean Falls, Bella

Bella, Port Hardy, the Broughton Archipelago, Johnstone Strait, Campbell River, and Lower Mainland;

- Identify potential yield management strategies that could be considered, such as differentiated fare structures (resident discounts, other date/time pricing flexibility, wholesaling);
- Identify potential measures to limit BCF financial risk, including but not limited to Alternative Service Delivery for service segments, potential Charter opportunities, wholesaling of tickets, and others;

APPENDIX E: PRODUCT DEVELOPMENT PERSPECTIVES – SHEARWATER MARINE GROUP

The Central Coast is a Canadian gift to the world. But visitors need to be able to get there. And residents need a timely, reliable, and affordable means to travel in order to maintain stability – the backbone of progress and the cornerstone of development.

Shearwater was founded almost 70 years ago as a marine centre focused on servicing the immediate local area. This included developing strong commercial ties to the neighboring communities of Bella Bella and Bella Coola, before eventually extending services to the entirety of the Central Coast.

The central coast teems with abundance today - as it has for thousands of years. It is the ecological conservatism in today's age of 'disposable' - which makes our region special and something to be celebrated.

Not only is our area rich in wildlife, flora, and fauna, but in history, culture, and cooperation. The central coast currently operates no businesses that can be classified as a 'polluter' – furthering our region's strong desire and commitment to maintain a pristine environment.

The obvious tourism draws of sport fishing, wildlife viewing/eco adventure, and the celebration of First Nations heritage should be considered enough to draw visitors from a global pool and significantly increase tourism, but there is so much more – and they are all interrelated.

- Whale watching
- Bear viewing
- Wildlife observation
- Salmon and Halibut fishing
- Adventure cruising
- Sailing explorations
- Photography adventures
- Camping and venturing
- Scuba tourism
- Ship wreck tours
- Kayaking
- Canoeing
- Off Trail Hiking – Appalachian trail-style system
- Adventure Running
- Gold Panning
- Fly Fishing
- Lake Fishing
- Fly-in remote lake fishing
- Heli-Tours
- Aerial Tours
- Art adventures

Shearwater no longer sees the same amount of vehicular and RV traffic as we once did. The European interest in doing a tour from their own vehicle – particularly an RV – including taking it on the ferry and 'up the coast' - still remains high, and we would like to see it expanded – especially as we have the existing infrastructure to support it.

With increased ferry service, the number of anglers and sheer number of visitors bringing their own boats up to the region should increase – especially when we market that opportunity to people ‘who had no idea’ that BC Ferries can load and offload their boat (with or without vehicle) and places like Shearwater will launch them free of charge.

And then there is the wellness aspect of our region. The pristine environment and clean and crisp air are immediately noticed by any city visitor, and the calmness and mystic remoteness allows visitors to easily ‘clear their minds’. However, there is more we are learning/sharing all the time. That is one of the wonders of a rainforest – discovery. The rare clay from a 400,000-tonne deposit in Kisameet Bay, less than an hour away from Shearwater in the heart of the Heiltsuk territory, that can be used in the fight against antibiotic-resistant bacteria just made national headlines.

The historical significance of our region follows a timeline that extends back to the creator. Within the modern era, the first European to cross North America, Alexander Mackenzie, landed in Bella Coola. You can still see his name engraved in rock. The Hudson’s Bay fur trading outpost of Fort McLoughlin was established in Bella Bella in 1832 - the second oldest European settlement on the coast of BC – a fact largely unknown which could be better celebrated. Rumours of Spanish Galleons seeking riches and safe harbour live on, and tales of various lost treasure(s) have carried on and infatuated generations. Our region has seen the establishment, rise and fall of many outposts and communities and there are still remnants of the Canadian WWII infrastructure at Shearwater.

In the past few years, Shearwater has noticed a significant decrease in visitors from ferry traffic. Utilizing our front-line sales team and the travel inquiries we receive, we are in a unique position to comment on this impact. We have determined without a doubt that there is a correlation between the current ferry service and the decrease of visitors to the Central Coast – particularly first time visitors. As ferry schedules and space are limited, potential visitor confidence in ferry service is cited as low. And visitor inconvenience - with regards to ferry travel - is cited as high.

Shearwater strives to maintain a leadership position with regards to public education surrounding the current ferry schedule and sailings, and works very closely with visitors as an intermediary concierge – to help demystify and demonstrate the current (but limited) opportunities to travel via the ferry system as a viable opportunity. However, our job would, without question, be made far easier with a commitment to improve the current operating schedule and Shearwater would become better positioned to help continue to drive new, first time visitors to the region.

We would like the Provincial government to assist in improving access to the Central Coast so that we may be able to best to share our Canadian gift with the world and deliver on our promise to provide a world class experience on the Central Coast of British Columbia while helping to maintain a vibrant local community.

**Craig Widsten, Executive Chairman and Founder,
Shearwater Marine Group**



APPENDIX F: PRODUCT DEVELOPMENT PERSPECTIVES – BELLA COOLA GRIZZLY TOURS

There are unique qualities that represent marketable Tourism Values to the Bella Coola area and give a significant reason for International travellers to want to come here and utilize the BC Ferry service to do so.

I am certainly not speaking on behalf of First Nations but I am hoping that their timeless presence and culture in the area should be fully recognized.

The Petroglyphs are quite unique to the Bella Coola Valley and are certainly the best display of First Nations rock carvings on the BC Coast that are thousands of years old and truly a world class sight to behold.

The Petroglyphs are a very important landmark and I would think somewhat sacred regarding the history and evidence of the early inhabitants of this BC Coast. They have significant cultural value and have very high Tourism potential.

First Nations Pictographs throughout the Territory (with many visible from the Ferry Decks) on prominent points of land throughout the Fjords are as well very significant evidence of First Nations history in this area and every Pictograph tells a story.

The Art of the First Nations including Carving Cedar Masks, Paintings, Totem poles, Canoes and Silver and Gold handcrafted jewelry are available here to see as well, where they are manufactured.

First Nation Smokehouse Tours are also popular.

BC Parks has officially recognized many areas on the Central Coast in the last couple decades with high Tourism values as depicted by all the new green BC Parks Protected and Conservancy areas on current maps.

Given the fact that Alexander Mackenzie was the first white European person to cross the continent arriving at Bella Coola in 1793, which was some 10 years prior to the famous and highly marketed American Lewis and Clark expedition, should be recognized as well. This Mackenzie Expedition has not been marketed on any sizable scale at all in comparison to the Lewis and Clark expedition who have huge monuments built at various sites in the United States for their overland accomplishments.

The abundant Fish and Wildlife including Grizzly Bears, 'Sea Wolves', Kermode Bears, Black Bears, Mountain Goats and Marine life including Humpback Whales, Dolphins, Killer Whales and of course Seals, Sea Lions, Elephant seals, Bald Eagles that we take for granted on the coast, are certainly an international tourism draw.

The Pristine Fjords with hanging Glaciers and little or no commercial vessel traffic are a pleasure to sail through and certainly some of the most rugged scenery on this Coast.

It may be noted as well that the Central Coast has no longer any active polluting industry such as pulpmills that would negatively affect and detract from the ecological quality of the wilderness tourism experience, therefore it lends itself perfectly to sustainable Tourism.

The majesty of the Glacial Fjords, Waterfalls and turquoise glacial water is somewhat unique to the Port of Bella Coola. The huge Old Growth Cedar and Fir trees are some of the largest Old Growth on this Coast and are also a tremendous natural Tourism draw to the area.

The Spawning Salmon rivers which host all five species of Wild Pacific Salmon are certainly the lifeline for the Grizzly Bears, Wolves and of course the People. The Dungeness Crab, Pacific Spot Prawn, Octopus, Halibut and fresh Pacific Salmon that can be readily harvested by an Angler here is priceless. Freshwater River and Lake Angling opportunities are limitless with the Dean River being one of the best Steelhead angling opportunities in the World, in some of the best Wildlife Viewing habitat.

Several sets of Natural Hotsprings are present in the Bella Coola region including a set in Oweekeno Lake on the Sheemahant system as well as South Bentinck and as well two sets of Hot Springs in the Dean channel.

These are just some of the untapped tourism values I see in this area among many others in the Bella Bella area to the West and the Chilcotin to the East.

The Port of Bella Coola may be considered a destination but the whole Circle Tour Route and the wonderful variance of what the different regions offer is, I would think, a very marketable product.

Leonard Ellis, Owner/Manager
Bella Coola Grizzly Tours



ⁱ Wave Point Consulting and Left Coast Insights on behalf of Aboriginal Tourism BC, "British Columbia Mid Coast Ferry Service Situation and Outlook Final Report," December 31, 2014. Cadence Strategies on behalf of Aboriginal Tourism BC, "Cariboo Chilcotin Coast Regional Aboriginal Tourism Strategy," March 2013. Cadence Strategies on behalf of Aboriginal Tourism BC, "Vancouver Island Regional Aboriginal Tourism Strategy," March 2014.

ⁱⁱ Note: this is merely an initial visual rendition and naming for discussion purposes. The final artwork and naming should be an inclusive process that involves local stakeholders and authentic Aboriginal art that is representative of the region. Original bear artwork: Jenny Kok, via www.pinterest.com.

ⁱⁱⁱ PKF Consulting, for Go RVing, "Family Vacation Cost Comparison," 2009. http://www.rvcare.ca/resources/gorving_study.pdf