

Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study

February 2003

Appendices



*Prepared by Grant Thornton LLP for the Central Okanagan Regional District
and the Province of British Columbia*

Preface

The *Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study* was commissioned by the Central Okanagan Regional District and the Province of British Columbia (Ministry of Sustainable Resource Management, Land and Water British Columbia Inc., and the former Forest Renewal British Columbia program). The Study was conducted from March 2002 to February 2003 by a consortium of consulting firms led by Grant Thornton LLP¹.

The *Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study* is comprised of two documents:

***Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study
– Main Report***

***Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study
– Appendices***

The following document presents the Appendices.

¹ *The Consulting Team included: Grant Thornton LLP, Economic Planning Group, Juan de Fuca Environmental Consultants and Timberline Forest Inventory Consultants.*

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Appendix A List of Participants and Stakeholders

Stakeholder Group A: Client & Project Steering Committee

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Central Okanagan Regional District	Leah Hartley	Growth Strategy Coordinator	1450 KLO Road	Kelowna, BC	V1W 3Z4	868-5227	762-7011	lhartley@cord.bc.ca
Central Okanagan Regional District	Ken Arcuri	Director of Planning Services	1450 KLO Road	Kelowna, BC	V1W 3Z4	868-5227	762-7011	karcuri@cord.bc.ca
Central Okanagan Regional District	Murray Kopp	Parks Planner	1450 KLO Road	Kelowna, BC	V1W 3Z4	868-5227	762-7011	
Ministry of Sustainable Resource Management	Nelson Grant	A/Manager, Strategic Planning						
Ministry of Sustainable Resource Management	Brenda Hartley							
Land and Water BC, Inc.	David Bacon	Commercial Recreation Manager						dave.bacon@gems6.gov.bc.ca

Stakeholder Group B: Government Agencies, Economic Development Agencies, Chamber of Commerce, Tourism Organizations & Associations

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Provincial								
Ministry of Energy & Mines	Rick Adams	Richard Neufeld - Minister					356-2965	
Ministry of Agriculture, Food & Fisheries	Wray McDonnell							wray.mcdonnell@gems6.gov.bc.ca
Ministry of Forests	Ted McRae	Michael De Jong - Minister					387-1040	
Ministry of Sustainable Resource Management	Nelson Grant*	A/Manager, Strategic Planning					356-8273	
Ministry of Water, Land & Air Protection	Drew Carmichael	Joyce Murray - Minister					387-1356	
Water & Land BC Corporation	David Bacon*	Commercial Recreation Manager						dave.bacon@gems6.gov.bc.ca
Water & Land BC Corporation	Peter Walters							peter.walters@gems6.gov.bc.ca
Water & Land BC Corporation	John Meeson	BC Parks Branch						john.meeson@gems6.gov.bc.ca
Tourism British Columbia	Craig Strickland	Manager, Industry Relations	802-865 Hornby St.	Vancouver, BC	V6Z 2G3	604 660-3763	604 660-3383	craig.strickland@tourism.bc.ca

*** Also on Project Steering Committee**

Regional and Local								
Economic Development Commission	Robert Fine	Executive Director	1450 KLO Road	Kelowna, BC	V1W 3Z4	868-5280	868-0512	
City of Kelowna	Signe Bagh	Planning	1435 Water Street	Kelowna, BC	V1Y 1J4	763-6011	862-3399	sbagh@city.kelowna.bc.ca
District of Lake Country	Mike Reiley	Director of Planning	17-11852 Hwy 97 N	Winfield, BC		766-5650	766-0116	planner@lakecountry.bc.ca
District of Peachland	Heidi Simkins	Planning Technician	5806 Beach Ave	Peachland, BC		767-2647	767-3433	hsimkins@gopeachland.ca
Tourism Kelowna	Nancy Cameron	Manager - Market Development	544 Harvey Avenue	Kelowna, BC	V1Y 6C9	861-1515	861-3624	nancy@kelownachamber.org
Thompson-Okanagan Tourism Association	Deana Rainey	CEO	1332 Water Street	Kelowna, BC	V1Y 9P4	860-5999	860-9993	drainey@totabc.com
Thompson-Okanagan Tourism Association	Alison McNeill	Board Representative	1332 Water Street	Kelowna, BC	V1Y 9P4	860-5999	860-9993	amcneill@dynamicevents.org
Kelowna Chamber of Commerce	Bonnie Bates-Gibbs	CEO	544 Harvey Avenue	Kelowna, BC	V1Y 6C9	861-1515	861-3624	bonnie@kelownachamber.org
Peachland Chamber of Commerce	Loni McLean	Manager	5812 Beach Ave	Peachland, BC	V0H 1X7	767-2455	767-2420	peachlandchamber@shawcable.com
Westbank Chamber of Commerce	Leah Thordarson	Manager	4-2375 Pamela	Westbank, BC	V4T 2H9	768-3378	768-3465	chamber@westbankchamber.com
Lake Country Chamber of Commerce	Gerry Morton	Manager	PO Box 41097 RPOS South	Winfield, BC	V4V 1Z3	766-0508	766-1091	mort@cablelan.net

Irrigation Districts								
Black Mountain Irrigation District	Phil Roskowsky	Manager	285 Gray Road	Kelowna, B.C.	V1X 1W8	765-5169		
LakeView Irrigation District			2570 Bartley Road	Kelowna, B.C.	V1Z 2M8			
Glenmore/Elison Irrigation District	Nancy Howlett	Manager	445 Glenmore Road	Kelowna, B.C.	V1V 1V6	763-6506		
South East Kelowna Irrigation District			3235 Gully Road	Kelowna, B.C.	V1W 4E5	861-4200		
McKinley Landing Irrigation District								
Rutland Irrigation District	Bruce Wilson	Manager	#160 Hwy 33 West	Kelowna, B.C.	V1X 1X7	765-5218		

* These contacts are also listed under "Project Steering Committee"

Stakeholder Group C: First Nations

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Okanagan Nation Alliance	Pauline Terbask	Executive Director	3255C Shannon Lake Road	Westbank, BC	V4T 1V4	707-0095	707-0166	director@sylix.org
Penticton Indian Band	Joan Phillip	Land planner	200 Westhill Drive	Penticton, BC	V2A 6J7	493-0048	493-2882	jphillip@pib.ca
Westbank First Nations			301-515 Hwy 97 S.	Kelowna, BC	V1Z 3J2	769-4999	769-4377	
Okanagan Indian Band	Randy Marchand	Land supervisor	S8 C20 RR7 Westside Road	Vernon, BC	V1T 7Z3	542-4328	542-4990	

Stakeholder Group D: Tourism Operators & the Travel Trade (Tour Operators & Agencies)

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Air Canada Jazz	Jennifer Leach-Trask		6-5533 Kelowna Airport	Kelowna, BC	V1V 1S1	765-5644	765-0081	please leave msg after faxing if faxed
Air-Hart Aviation	Trevor Erhardt	President	1326 Water Street	Kelowna, BC	V1Y 9P4	762-9830	762-9840	airhart@home.com
Beaver Lake Mountain Resort	Alex Bussmann	Owner	6350 Beaver Lake Rd.	Winfield	V4V 1T7	762-2225		
Camp Dunlop	Scouts Canada		5325 Lakeshore Road	Kelowna, BC	V1W 4J3	764-7646		
Canyon Stables			1-4561 McCulloch Road	Kelowna, BC	V1W 4G1	717-0476		
Central Mountain Air Ltd.	no longer in business		PO Box 150 Stn. Main	Dawson Creek, BC	V1G 4G4	782-1661		
Chevallier-Ridge Rider	Diana Chevallier	Owners	4020 Dryden Road	Peachland, BC	V0H 1X0	767-2616	767-2672	Lchevallier@shaw.ca
Chute Lake Resort not in study area but relevant	Doreen Reed	Co-Owner	797 Alexander Ave	Penticton, BC	V2A 1E6	493-3535	496-4017	chutelake@vip.net
Cliff's Adventure Holidays Ltd.	number ?		3223 Woodsdale Road	Winfield, BC	V4V 1X7	766-1107	766-2300	
Crux Climbing Centre	Glen	Owner	2 - 1414 Hunter Court	Kelowna, BC	V1X 6E6	860-7325	n/a	none
Curtis Nyulul's Taxidermy	number ?		11361 Highway 33 E	Kelowna, BC	V1P 1K1	765-3408		
Dacor Quarter Horses	number ?		Hwy 97	Lac La Hache, BC	V0K 1T0	791-6706		
Douglas Lake Ranch	Carlo Elstak	Manager of Recreation	Douglas Lake Road	Douglas Lake, BC	V0E 1S0	250-350-3344	250-3336	CLE@douglaslake.com
Eight Mile Ranch	Kim Stinson	Owner	5983 Hwy 33E	Kelowna, BC	V1P 1H8	765-0177	765-8008	kim@eightmileranch.com
First Cast Trout Shop and Guide Service	Brad Tomnuk	President	Beaver Lake Road	Winfield, BC	V4V 1S5	878-4225		firstcast@silk.net
GeoQwest Excursions	Steve Noakes	President	1734 Keloka Drive	Kelowna, BC	V1Z 2X1	769-0031	769-0031	snoakes@okanagan.net
Girl Guide Arbuckle	Margret		14750 Carrs Landing Road	Lake Country BC	V4V 1C5	765-7810		
Grandeza Caballo Del	number ?		4121 Anderson Road	Kelowna, BC	V1X 7V8	491-7764		
Greenscene Getaways	number ?		316 - 3175 de Montreuil Court	Kelowna, BC	V1W 3W2	212-8933		
Grey World Adventure	number ?		809 Stockwell Ave	Kelowna, BC	V1Y 6W1	679-9653		
Headwaters Fishing	waiting for call back		P.O. Box 350	Peachland, BC	V0H 1X0	767-2400		
Idabel Lake Resort	Paul & Vivian Burrridge	Owners	4-12000 Hwy 33E	Kelowna, BC	V0K 2J0	765-9511	765-4509	idabel@telus.net
Jackpine Fishing Camp ???	no answer		3 - 2472 Main Street	Westbank, BC	V4T 1Z1	707-0766		
Johnny B's Outdoor	waiting for call back		3387 Gates Road	Kelowna, BC	V4T 1B3	718-0899		
Kelowna Riding Club	Anita Lawry	President	3745 Gordon Drive	Kelowna, BC	V1W 4M8	762-6370	# 868-3951	
Kettle Valley Mountain Bike Tour	number ?		3096 Walnut Street	Kelowna, BC	V1Y 6N9			
Klassic Bus Tours	Gerald Klassen	Owners	1105 Elwyn Road	Kelowna, BC	V1X 1P5	763-9003	763-1866	
Lake Okanagan Resort	Loreen Rualt	VP of Operations	2751 Westside Road N	Kelowna, BC	V1Z 3T1	769-3511	769-6665	info@lakeokanagan.com
Lakefront Sports Centre	Anne & Maurice Gervais	Owners	1310 Water Street	Kelowna, BC	V1Y 9P3	862-2469	n/a	fun@sparkysrentals.com
Laurian Quarter Horses	Laurie Takoff	Owner	2880 Schram Road	Kelowna, BC	V1P 1K2	765-7228	765-7228	laurianquarterhorses@telus.net
Let It Ride Charters			2231 Shannon Ridge Dr.	Kelowna, BC	V4T 1S9	878-0063		
Little White 4 x 4	waiting for call back		3437 Liard Court	Westbank, BC	V4T 1B6	768-2371		
Mandy and Me Trail Riding	Silverado Shackleton	Owner	174 Bear Creek Road	Westbank, BC	V1Z 3T6	769-5735		sshackle@silk.net
McCowans Sporting			P.O. Box 31033	Kelowna, BC	V1Z 3N9	798-2200		
McCulloch Lake Resort Ltd.	Nancy & Jim Pollard	Owners	9995 McCulloch Road	Kelowna, BC	V1P 1K3	862-7834	862-7834	
Mench Industries Ltd.			3365 Bulman Road	Kelowna, BC	V1X 7L5	717-8917		
Monashee Adventure Tours	Ed Kruger	President	1591 Highland Drive North	Kelowna, BC	V1Y 4K6	762-9253		info@monasheeadventuretours.com
Myra Stable	no answer		4429 June Springs Rd	Kelowna, BC	V1W 4C8	863-3520		
Nordic Cross Country Skiing	Ross Sutcliffe	President	P.O. Box 105 PBC	Kelowna, BC	V1Y 7N3	769-5158	762-4266	wemigh@silk.net
Off The Beaten Track			361 Beach Avenue	Kelowna, BC	V1Y 5R7	762-9460		
Okanagan Adventure Co.	Leah Thatchuk	Sales Co-ordinator	1330 Water Street	Kelowna, BC	V1Y 9P4	491-9155	491-9175	leah@northwestgolftours.com
Okanagan Canoe Holidays			2910 Glenmore Road N.	Kelowna, BC	V1V 2B6	762-8156	762-8156	
Okanagan Charters			104-1421 Sutherland Avenue	Kelowna, BC	V1Y 8G1	861-5169		
Okanagan Events	Sharon Baert	Owner	920 Theodora Road	Kelowna, BC	V1X 5D2	860-9191		tours@okanaganevents.com

Okanagan Flyfishing Outfitters			13882 Lakepine Road	Winfield, BC	V4V 1A3	250-770-6140		oceanwest@uniserve.com
Okanagan Mountain Bike Tours			PO Box 22029, Capri Postal Outlet	Kelowna, BC	V1Y 9N9	977-2453		
Okanagan Wine Country Tours	Patricia Petreau	Owner	1527 Ellis Street	Kelowna, BC	V1Y 2A7	868-9463	868-9464	winetours@silk.net
Okanagan Wine Festival			Box 854	Kelowna, BC	V1Y 7P5	861-6654	861-3942	
Postill Lake Lodge	Joan Goldfinch	Owner	411 - 2125 Burtch Road	Kelowna, BC	V1Y 8N1	212-0579	212-0579	none
Saddle Ridge Ranch			5615 Dead Pine Drive	Kelowna, BC	V1P 1A3	861-3974		
Scoop Lake Outfitters	Darwin Cary	Owner		Summerland, BC		491-1885	491-1885	scooplake@okanagan.net
Sun Oka Adventure Tours			2978B Pandosy Street	Kelowna, BC	V1Y 1W2	494-8346		
Sunwest Tours (1987)			home based			762-8687	762-8162	
Tykes Can Tour - Family Outdoor	Joe Kyle	Owner	Box 186	Naramata, BC	V0H 1N0	762-9216		tykescantour@shaw.ca
Vista Treks	Craig Henderson	Owner	10-5533 Kelowna Airport	Kelowna, BC	V1V 1S1	250-496-5220	250-496-5422	info@kettlevalleytrail.com
West Jet			2715 Hewlett Road	Kelowna, BC	V1W 4B4	491-0493		
Wind Song Farm	Ingrid Dicks	Owner	3201 Pleasant Valley Road	Vernon, BC	V1T 4L4	762-4846	762-4747	none
Winds & Rivers Escapes Ltd.	Reg Scott	Owner	4193 Gordon Road	Kelowna, BC	V1Y 1S4	545-4280		r_hscott@shaw.ca
Y. U. Ranch	Colin Thomson	President				764-8588		

Stakeholder Group E: Recreational Clubs and Organizations

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Kettle Valley Trail Organization	Brian ??	number ?						
Back Country Horseman Assoc.	Isabelle Pritchard	President	2080 Saucier Road	Kelowna, BC	V1W 4C1	764-4533	764-4536	
Fish and Game Club	Rick Percieval	Range Manager	4041 Casorso Road	Kelowna, BC		764-7558		rick&ann@telus.net
Lonely Loon Fly Fisher's	Terry Tranfield	President	14041 Talbot Road	Kelowna, BC	V4V 2C2	548-3349		yknot@silk.net
Kelowna Riding Club	Carol Schellneberger	President	3745 Gordon Drive	Kelowna, BC	V1W 4M8	491-2265		
ATV Club - Kelowna	Cole Haddad	message	3745 Gordon Drive	Kelowna, BC	V1W 4M8	861-5916		
Kelowna Dirt Bike Club	Terry Burke	Treasurer	Box 2643 Stn. R.	Kelowna, BC	V1X 6A7	765-3436	765-3436	tscomputers@telus.net
Rock and Gem Club	Ken Dewerson	President	338-2330 Butt	Westbank, BC	V4T 2L3	707-0618	n/a	dewerson@shaw.ca
Spelunking - Caves	BC Spelological Federation	number ?	25-500 Larch Place	Gold River, BC				
Alpine Club of Canada	Dave Urness	message	927 Tataryn Rd	Kelowna, BC	V1X 1N6	763-2936		
Canoe and Kayak Club	Bob Gasser	President	160 Dougal Rd North	Kelowna, BC	V1X 3K5	765-9548	765-4504	bgasser@silk.net
Kayak and Conoe Club	Doug Hartley	Treasurer	Suite 101 1441 Ellis Street	Kelowna, BC	V1Y 2A6	762-2112	762-9119	
Cross Country Ski Club								
Nordic	Ross Sutcliffe	President	PO Box 105 PBC	Kelowna, BC	V1Y 7N3	769-5158	762-4266	wemigh@silk.net
Telemark	Clive Gilbert	President	PO Box 26072	Westbank, BC	V4T 2G3	769-4406		bcgilbert@shaw.ca
Orchard Country Ski Club	Tom Witt	Ski tourist co-ordinator				868-9771		oc@ocsc.ca
Okanagan Snowmobile Club								
Hiking Club	Ross Sutcliffe	President	PO Box 105 PBC	Kelowna, BC	V1Y 7N3	769-5158	762-4266	wemigh@silk.net
Central Okanagan Hiking Club	Mike Motschko	message				491-0246		
Mountain Bike Club	message	President				765-4877		
Naturalist Club	Pat Westheuser	no answer				769-6605		
Western Canada Wilderness Committee	Bruce Sumner	number ?	PO Box 82	East Kelowna, BC	V1Y 7N3			
Tour DeVines Society	Brad Lee	Chairperson	888 W. Westminster Ave.	Penticton, B.C.	V2A 8S2	1800-6663-1900		info@tourdevine.bc.ca

Stakeholder Group F: Other Resource Users/Industries & Related Associations / Organizations

Stakeholder Organization	Contact	Position	Address	City & Province	Postal Code	Telephone	Fax	Email
Riverside Forest Products Ltd.	Mike Doiron	Forestry Planner	820 Guy St.	Kelowna, BC	V1Y 7R5	762-3411	470-4375	mjdoiron@riverside.bc.ca
Gorman Bros.	Nick Arkle	Woodlands manager	Box 26052	Westbank, BC	V4T 2G3	768-5131	768-2822	narkle@gormanbros.com
Interior Lumber Manufacturers' Association	Peter Affleck	Forestry manager	360-1855 Kirschner Road	Kelowna, BC	V1Y 4N7	860-9663	860-0009	paffleck@ilma.com
BC Agricultural Council	Steve Thomson	Executive Director	102-1482 Springfield Road	Kelowna, BC	V1Y 5V3	763-9790	762-2997	bcac@bcagcouncil.com
BCFGA (Agri-Tourism)	Glen Lucas	Executive Director/CEO	1473 Water Street	Kelowna, BC	V1Y 1J6	762-5226	861-9089	bcfga@bctree.com
BC Wine Institute	Len Bykowski	President	9312 Jubilee Road	Summerland, BC	V0H 1Z0	250-494-9772	250-494-9704	lbykowski@bcwi.bc.ca
BC Cattlemans' Association	David Borth	CEO	Agri-Centre #4 10145 Dallas Drive	Kamloops, BC	V2C 6T4	250-573-3611	250-573-5155	bccattle@kamloops.net

Appendix B List of Tour Operators, Businesses and Recreational Clubs

Name of Business or Organization	Contact Name	Address	City & Province	Postal Code
Alpine Club of Canada	Dave Urness	927 Tataryn Rd	Kelowna, BC	V1X 1N6
Back Country Horseman of BC	Isabel Pritchard	2080 Saucier Road	Kelowna, BC	V1W 4C1
Beaver Lake Mountain Resort	Alex Bussmann	6350 Beaver Lake Rd.	Winfield, BC	V4V 1T7
Black Mountain Irrigation District	Phil Roskowsky	285 Gray Road	Kelowna, B.C.	V1X 1W8
Horses)	Laurie Takoff	2880 Schram Road	Kelowna, BC	V1P 1K2
Camp Dunlop	Volunteer	5325 Lakeshore Road	Kelowna, BC	V1W 4J3
Canoe and Kayak Club	Bob Gasser	160 Dougal Rd North	Kelowna, BC	V1X 3K5
Canyon Stables		1-4561 McCulloch Road	Kelowna, BC	V1W 4G1
Central Okanagan Hiking Club	Mike Motschko			
Chevallier-Ridge Rider	Diana Chevallier	4020 Dryden Road	Peachland, BC	V0H 1X0
Chute Lake Resort	Doreen Reed	797 Alexander Ave	Penticton, BC	V2A 1E6
Cliff's Adventure Holidays Ltd.		3223 Woodsdale Road	Winfield, BC	V4V 1X7
Crux Climbing Centre	Glen	2 - 1414 Hunter Court	Kelowna, BC	V1X 6E6
Curtis Nylui's Taxidermy		11361 Highway 33 E	Kelowna, BC	V1P 1K1
Dacor Quarter Horses		Hwy 97	Lac La Hache, BC	V0K 1T0
Douglas Lake Ranch	Carlo Elstak	Douglas Lake Road	Douglas Lake, BC	V0E 1S0
Eight Mile Ranch	Kim Stinson	5983 Hwy 33E	Kelowna, BC	V1P 1H8
Service	Brad Tomnuk	Beaver Lake Road	Winfield, BC	V4V 1S5
Fish and Game Club	Manager	4087 Casorso Road	Kelowna, BC	V1W 4N6
GeoQwest Excursions	Steve Noakes	1734 Keloka Drive	Kelowna, BC	V1Z 2X1
Girl Guide Arbuckle	Margret	14750 Carrs Landing Road	BC	V4V 1C5
Glenmore/Ellison Irrigation District	Nancy Howlett	445 Glenmore Road	Kelowna, B.C.	V1V 1V6
Grandeza Caballo Del		4121 Anderson Road	Kelowna, BC	V1X 7V8
Greenscene Getaways		316 - 3175 de Montreuil Court	Kelowna, BC	V1W 3W2
Grey World Adventure		809 Stockwell Ave	Kelowna, BC	V1Y 6W1
Headwaters Fishing		P.O. Box 350	Peachland, BC	V0H 1X0
Hiking Club	Ross Suttcliffe	PO Box 105 PBC	Kelowna, BC	V1Y 7N3
Idabel Lake Resort	Paul & Vivian Burrige	4-12000 Hwy 33E	Kelowna, BC	V0K 2J0
Band)	Randy Marchand	S8 C20 RR7 Westside Road	Vernon, BC	V1T 7Z3
Jackpine Fishing Camp		3 - 2472 Main Street	Westbank, BC	V4T 1Z1
Johnny B's Outdoor		3387 Gates Road	Kelowna, BC	V4T 1B3
Kayak and Conoe Club	Doug Hartley	Suite 101 1441 Ellis Street	Kelowna, BC	V1Y 2A6
Kelowna ATV Club	Cole Haddad			
Kelowna Dirt Bike Club	Terry Burke	Box 2643 Stn. R.	Kelowna, BC	V1X 6A7
Kelowna Riding Club	Carol Schellneberger	3745 Gordon Drive	Kelowna, BC	V1W 4M8
Kelowna Riding Club	Anita Lawry	3745 Gordon Drive	Kelowna, BC	V1W 4M8
Kettle Valley Mountain Bike Tour		3096 Walnut Street	Kelowna, BC	V1Y 6N9
Klassic Bus Tours	Gerald Klassen	1105 Elwyn Road	Kelowna, BC	V1X 1P5
Lake Okanagan Resort	Loreen Rualt	2751 Westside Road N	Kelowna, BC	V1Z 3T1
Lakefront Sports Centre	Anne & Maurice Gervais	1310 Water Street	Kelowna, BC	V1Y 9P3
LakeView Irrigation District		2570 Bartley Road	Kelowna, B.C.	V1Z 2M8

Name of Business or Organization	Contact Name	Address	City & Province	Postal Code
Little White 4 x 4	waiting for call back	3437 Liard Court	Westbank, BC	V4T 1B6
Lonely Loon Fly Fishers Club	Terry Tranfeld	14041 Talbot Road	Kelowna, BC	V4V 2C2
Mandy and Me Trail Riding	Silverado Shackelton	174 Bear Creek Road	Westbank, BC	V1Z 3T6
McCulloch Lake Resort Ltd.	Nancy & Jim Pollard	9995 McCulloch Road	Kelowna, BC	V1P 1K3
Monashee Adventure Tours	Ed Kruger	1591 Highland Drive North	Kelowna, BC	V1Y 4K6
Kelowna Mountain Bike Club				
Naturalist Club	Pat Westheuser			
Nordic Cross Country Skiing	Ross Suttcliffe	P.O. Box 105 PBC	Kelowna, BC	V1Y 7N3
Nordic Ski Club	Ross Sutcliffe	PO Box 105 PBC	Kelowna, BC	V1Y 7N3
Off the Beaten Track	Joel Rodda	361 Beach Avenue	Kelowna, BC	V1Y 5R7
Okanagan Adventure Co.	Leah Thatchuk	1330 Water Street	Kelowna, BC	V1Y 9P4
Okanagan Canoe Holidays		2910 Glenmore Road N.	Kelowna, BC	V1V 2B6
Okanagan Charters		104-1421 Sutherland Avenue	Kelowna, BC	V1Y 8G1
Okanagan Events	Sharon Baert	920 Theodora Road	Kelowna, BC	V1X 5D2
Okanagan Flyfishing Outfitters				
Okanagan Mountain Bike Tours		13882 Lakepine Road	Winfield, BC	V4V 1A3
Okanagan Wine Country Tours	Patricia Petreau	PO Box 22029, Capri Postal Outlet	Kelowna, BC	V1Y 9N9
Okanagan Wine Festival Society	Blair Baldwin	1527 Ellis Street	Kelowna, BC	V1Y 2A7
Orchard Country Ski Club	Tom Witt			
Postill Lake Lodge	Dave Cory Goldfinch	Box 854	Kelowna, BC	V1Y 7P5
Rock and Gem Club	Ken Dewerson	338-2330 Butt Road	Westbank, BC	V4T 2L3
Rock and Gem Club	Ken Dewerson	338-2330 Butt Road	Westbank, BC	V4T 2L3
Rutland Irrigation District	Bruce Wilson	#160 Hwy 33 West	Kelowna, B.C.	V1X 1X7
District		3235 Gullely Road	Kelowna, B.C.	V1W 4E5
Spelunking - Caves	Federation	25-500 Larch Place	Gold River, BC	
Sun Oka Adventure Tours	cannot find alternate number		Summerland, BC	
Sunwest Tours (1987)	participating	2978B Pandosy Street	Kelowna, BC	V1Y 1W2
Telemark Cross Country Ski Club	Clive Gilbert	PO Box 26072	Westbank, BC	V4T 2G3
Tour DeVines Society	Brad Lee	888 W. Westminster Ave.	Penticton, B.C.	V2A 8S2
Tykes Can Tour	Joe Kyle	775 Camelia	Kelowna, BC	V1X 3M9
Vista Treks	Craig Henderson	Box 186	Naramata, BC	V0H 1N0
Committee	Bruce Sumner	PO Box 82	BC	V1Y 7N3
Winds & Rivers Escapes Ltd.	Reg Scott	3201 Pleasant Valley Road	Vernon, BC	V1T 4L4
Windsong Farm	Ingrid Dicks	2715 Hewlett Road	Kelowna, BC	V1W 4B4
Y. U. Ranch	Colin Thomson	4193 Gordon Road	Kelowna, BC	V1Y 1S4

Appendix C Survey Forms

- 1. Issues and Opportunities Survey**
- 2. FormOperator and Club Survey Form**



Central Okanagan Crown Land Tourism & Commercial Recreation Opportunity Study (March – November 2002)

Issues & Opportunities Survey

To assist us in understanding the key tourism and commercial recreation issues and opportunities that you feel are important, we are asking you to please complete the attached survey.

Introduction:

The Central Okanagan Regional District is conducting a *Crown Land Tourism and Commercial Recreation Opportunity Study*. This study will examine tourism and recreation trends and market opportunities; identify regional land and resource assets and constraints; examine outdoor recreation and tourist infrastructure; and identify key opportunities for Crown land and resource development.

The Study Area for this project is the Crown land portion of the Central Okanagan Regional District. The project is being conducted by a Consulting Team led by Grant Thornton LLP, from March to November 2002. For more information on this project and project updates, please see the contact details and web site noted below.

At this time, the Consulting Team is seeking your opinion on key issues and opportunities affecting existing and potential tourism and commercial recreation development in the Central Okanagan. They are also interested in understanding the interaction of tourism and commercial recreation with other resource users and industries. To this end, we are asking that you please complete the attached survey.

Please return your completed survey by:

- 1. Completing the survey on the Internet: www.cordtourismstudy.ca; OR***
- 2. Emailing it to tsanderson@grantthornton.ca; OR***
- 3. Faxing it to: Todd Sanderson, Grant Thornton LLP (Kelowna) at (250) 762-8896.***

For More Information

- 1. Click on: [Insert project web site address]; and/or**
- 2. Contact Jennifer Nichol, Grant Thornton LLP
Telephone: (604) 515-4345 Email: jnichol@grantthornton.ca**

**Central Okanagan Crown Land Tourism & Commercial Recreation
Opportunity Study (March – November 2002)
*Issues & Opportunities Survey***

About Your Organization:

Please check or circle which category(ies) you or your organization / business falls under.

- | | |
|---|--|
| 1. <i>Accommodation (urban/city/town/roadside)</i> | 11. <i>Transportation Service/Operator</i> |
| 2. <i>Accommodation (resort/outdoor/adventure)</i> | 12. <i>Academic Institution (instructor/professor)</i> |
| 3. <i>Attraction / Museum / Entertainment</i> | 13. <i>Student</i> |
| 4. <i>Tourism Business/Operator (urban)</i> | 14. <i>Gov. Ministry (Tourism)</i> |
| 5. <i>Tourism Business/Operator (outdoor)</i> | 15. <i>Crown Corp. (Tourism)</i> |
| 6. <i>Tourism Organization, DMO, Assoc.</i> | 16. <i>Gov. Ministry/Crown Corp. (Non-Tourism)
(specify)</i> |
| | _____ |
| 7. <i>Travel InfoCentre</i> | 17. <i>Other Industry (specify)</i> |
| | _____ |
| 8. <i>Restaurant/Pub</i> | 17. <i>Convention/Exhibition Centre</i> |
| 9. <i>Retail</i> | 18. <i>Meeting/Event Planner/Support Services</i> |
| 10. <i>Travel Trade (tour operator/travel agency)</i> | 19. <i>Other (specify):</i> |
| | _____ |

Please fill in the following information (optional):

Your Name:

Name of Organization / Business:

Tel: _____ **Fax:** _____

Email: _____

Please return your completed survey by:

- 1. Completing the survey on the Internet: www.cordtourismstudy.ca; OR***
- 2. Emailing it to tsanderson@grantthornton.ca; OR***
- 3. Faxing it to: Todd Sanderson, Grant Thornton LLP (Kelowna) at (250) 762-8896.***

Survey Attached

All responses will remain confidential.

Thank You!

A. Existing Tourism & Commercial Recreation Strengths and Weaknesses

1. Tourism and Commercial Recreation Strengths

What are the Central Okanagan's strengths in terms of existing tourism and commercial recreation:

Products or Activities?

Facilities?

Natural Features and/or Settings?

Cultural Features?

Infrastructure (trails, roads, airports, etc.)?

Government and/or Tourism Organizations?

Other?

2. Tourism and Commercial Recreation Weaknesses or Constraints

What are the Central Okanagan's weaknesses or constraints in terms of existing tourism and commercial recreation:

Products or Activities?

Facilities?

Natural Features and/or Settings?

Cultural Features?

Infrastructure (trails, roads, airports, etc.)?

Government and/or Tourism Organizations?

Other?

B. Potential Tourism & Commercial Recreation Opportunities	
<p>1. <u>Development Opportunities</u></p> <p>Are there tourism and / or recreational activities --currently not offered in the region -- that the Central Okanagan could develop to meet market demand? Please describe.</p>	
<p>2. <u>Expansion Opportunities</u></p> <p>What are the Central Okanagan's opportunities in terms expanding existing tourism activities or products?</p>	
<p>3. <u>Packaging Opportunities</u></p> <p>Do you think there are opportunities to package products (e.g., one or more tourism products/activities sold as a package) or activities in the Central Okanagan to meet market demand?</p> <p>If yes, please describe these opportunities.</p>	
C. Tourism & Commercial Recreation – Interactions	
<p>1. <u>Areas of Interaction</u></p> <p>a) Non-tourism/Recreation Industries If you represent an interest other than tourism or recreation, please describe how your interests overlap (positively or negatively) with those of the tourism and recreation users. If this interaction involves a geographic area, please specify.</p> <p>b) Tourism/Recreation Users If you represent or are a tourism / recreation user, please describe how your interests overlap (positively or negatively) with those of the other tourism and recreation users. If this interaction involves a geographic area, please specify</p>	
<p>2. <u>Areas of Potential Collaboration</u></p> <p>Do you think there are opportunities to collaborate more with tourism and recreational interests? If yes, please describe these opportunities.</p>	
D. Other Comments	
<p>1. Do you have any other comments or ideas regarding the future of tourism and commercial recreation in the Central Okanagan?</p>	



Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study (March – November 2002)

Operator Survey – May 2002

The Central Okanagan Regional District is conducting a *Crown Land Tourism and Commercial Recreation Opportunity Study*. This study will examine tourism and recreation trends and market opportunities; identify regional land and resource assets and constraints; examine outdoor recreation and tourist infrastructure; and identify key opportunities for Crown land and resource development.

The Study Area for this project is the Crown land portion of the Central Okanagan Regional District. The project is being conducted by a Consulting Team led by Grant Thornton LLP, from March to November 2002. For more information on this project and for project updates, please see the contact details and web site noted below.

At this time, the Consulting Team is seeking your help to update the current Provincial Tourism Resource Inventory for the Central Okanagan Region and to understand key issues and opportunities you see with regard to future tourism and recreational development in the region. To this end, the Consulting Team will be asking you questions about your tourism operation's activities, size, operating area, and key constraints. This survey will be conducted in-person, by telephone or by fax, depending on the most convenient method for both you and the Consulting Team.

For more information on the project, please:

- 1. Click on: [insert project web site address]; and/or**
- 2. Contact Jennifer Nichol, Senior Manager, Grant Thornton LLP Telephone: (604) 515-4345 Email: jnichol@grantthornton.ca**

Central Okanagan Crown Land Tourism and Commercial Recreation Opportunity Study

OPERATOR SURVEY

May 2002

The Central Okanagan Regional District is conducting a *Crown Land Tourism and Commercial Recreation Opportunity Study*. A step in the process is inventorying the operators and businesses that are located on, or use, Crown land in the region. This questionnaire is intended to record information about your business, and document your opinions on several development topics.

Organization Name _____

Contact _____

Mailing Address _____

Physical Address (if different) _____

City & Province _____ **Postal Code** _____

Phone _____ **Fax** _____

e-mail _____ **Web Site** _____

1. What category(ies) best describes your operation? (*Check the appropriate category, describe the operation, and indicate the capacity.*)

Category	✓	Description/Type	Capacity
Accommodation facility	—	_____ _____ _____	Units _____ Campsites _____
Outdoor Recreation facility	—	_____ _____ _____	Total at-one-time participants _____
Tour Operator	—	_____ _____ _____	Total at-one-time participants _____
Other	—	_____ _____ _____	_____ _____

2. Is your operation:

a) Private Sector (for profit) Business: Y N

b) Not-for-Profit: Y N

3. What are the **primary activities** (e.g., the main purpose for visiting your business) provided by your operation in the Central Okanagan Region (e.g., skiing, fishing, cycling, wildlife viewing, etc.)?

4. What other or **secondary activities** (e.g., other activities visitors may choose to do while visiting your business) are provided by your operation (e.g., wildlife viewing, camping, hiking, etc.)?

5. What are the **key geographical features** and **natural resources** that you use in your operations (e.g., specific trails, lakes, viewscapes, etc. – please name these if possible, such as Okanagan Rim Trail, Silver Lake, Commando Bay, etc.)?

6. What are the **key cultural features** that you use in your operations (e.g., pioneer lifestyles, First Nations' heritage, etc. – please name these if possible)?

7. Please describe how visitors **access** your main facilities and staging areas (e.g., paved road, forest service road, float plane, etc.).

Facilities Access: _____

Staging Areas Access (e.g., area where you gather to commence activities):

8. What **months do you operate?** (Either year-round or list the months.)

9. Approximately what proportion of your visitors are local (**Central Okanagan**) or non-local (**outside the Central Okanagan**)?

Local (%): _____ **Non-Local: (%)** _____

10. What are the key **issues affecting tourism development** in the Central Okanagan Region?

11. Are there any **issues that are affecting your operation** or your ability to operate?

12. What do you see as **strengths of tourism and commercial recreation** in the Central Okanagan?

13. Do you see **opportunities for developing or packaging** tourism and commercial recreation products in the Central Okanagan that you or others are not pursuing?

14. Do you have **expansion plans** for your business? If yes, please describe.

15. What conditions (e.g., ability to obtain Crown land lease, ability to obtain financing, etc.) would **support** the expansion of your operation?

16. What conditions (e.g., ability to obtain Crown land lease, ability to obtain financing, etc.) are **constraining** the expansion of your operation?

17. Please indicate the approximate proportion of your business that you operate within the Central Okanagan. _____ %

18. On the attached map, please identify your main facilities and operating area(s) within the Central Okanagan.

Thank you for your cooperation.

Appendix D Study Methodology

The study methodology included the following stages:

1. **Data Collection**
2. **Preliminary Consultation**
3. **Data Analysis**
4. **Draft Report**
5. **Communications Phases I and II**
6. **Final Report and Mapping Deliverables**

A detailed description of the methodology is presented below.

1. Data Collection

The data collection involved five main components:

- Literature Review
- Updating of the Existing (1994) Tourism Resource Inventory
- Identification and Mapping of Existing and Pending Commercial Recreation Crown Land Tenures
- Identification and Mapping of the Existing (Non-Tourism and Commercial Recreation) Crown Land Tenures and Resource Uses
- Identification of Tourism and Recreation Markets, Trends and Product Quality Expectations

This stage of the study – in particular the *Updating of the Tourism Resource Inventory Update* – involved fieldwork conducted by Consulting Team members. The five components of this stage are described below.

Literature Review

Early in the process, the Consulting Team conducted a comprehensive literature review. This involved obtaining, reviewing and documenting a range of documents including relevant plans, maps, strategies and policy documents. Throughout the study, the Consulting Team continued to review new literature as it became available, such as the *Provincial Rails to Trails Strategy* (Pinnacle Consulting, June 2002). The resulting bibliography is available in Appendix M.

Updating of the Existing (1994) Tourism Resource Inventory

A Tourism Resource Inventory (TRI) for the Okanagan-Thompson was completed in 1994. A key deliverable for this study was the updating of the portion of the 1994 TRI that falls within the CORD Study Area. An initial step in this process was reviewing the previous TRI to determine standards used and level of detail. Important factors about the 1994 TRI are noted below.

- The 1994 TRI features and facilities data is at a 1:250,000 scale, while the tourism use areas data is generally at a 1:20,000 scale.
- The 1994 TRI presents tourism features, facilities and use areas.
- The 1994 features data includes selected trails, mountains, canyons, creeks, rivers and lakes; however, only trails, roads, selected mountains and selected lakes were mapped for the CORD Study Area.
- The 1994 facilities coverage does not locate, as points, any facilities in the CORD Study Area. The facilities mapped as points appear to be primarily in urban areas, which are not within the 2002 Study Area boundaries.
- The 1994 TRI uses standards that differ from those required for the 2002 study (Digital Data Standards for a Community-Scale Tourism Opportunity Strategy, March 2000).

A summary of the scope of the 1994 TRI (for the portion that covers the 2002 Study Area) in relation to the 2002 TRI is provided in the following table.

TRI Category	1994 TRI	2002 TRI
Tourism Use Areas	<ul style="list-style-type: none"> • 1:250,000 scale • 10 unique features • 7 attribute items 	<ul style="list-style-type: none"> • Mainly 1:20,000 scale • 31 unique features • 28 attribute items (including related table)
Tourism Facilities	<ul style="list-style-type: none"> • 0 features 	<ul style="list-style-type: none"> • Mainly 1:20,000 scale • 16 unique features • 51 attribute items (including related table)
Tourism Features	<ul style="list-style-type: none"> • 1:250,000 scale • 13 unique features (lines only) • 12 attribute items 	<ul style="list-style-type: none"> • 1:50,000 scale • 233 unique features (84 points, 119 polygons, 30 lines) • 10 attribute items

2002 Existing Use and Facilities Inventory and Mapping

The Consulting Team felt that it would be more useful for this project’s analysis to conduct a more detailed “use areas” and “facilities” inventory for the 2002 study, since the 1994 TRI was at a smaller scale and did not include facilities in the Study Area. Therefore, rather than simply updating the 1994 TRI, a new inventory was conducted for these two coverages. The process for conducting this inventory is described below.

- The 1994 TRI maps and data were reviewed for level of detail, scale, data gaps, mapping standards, and other factors.
- A data collection survey for operators, facilities and recreational clubs was prepared.
- The draft survey was reviewed by the client and then modified according to client feedback (see Appendix C).
- A list of operators, tour operators and recreational clubs was compiled (see Appendix B).

- Interviews were conducted, in-person, when possible. Operators and clubs completed the survey and indicated on Study Area maps the location of their facilities, use areas and access routes. Several operators were difficult to schedule interviews with since this component of the project was scheduled for early summer.
- Once the surveys and mapping were completed, the resulting data and maps were compared to the 1994 map. Any discrepancies were noted and checked, to ensure the 2002 data was not missing relevant data from the 1994 TRI.
- The new use areas and facilities data were digitized using ArcInfo, following the *Digital Data Standards for a Community-Scale Tourism Opportunity Strategy*, March 2000 specifications. Where features from the existing 1994 TRI were still accurate, those features were appended to the digitized coverage.

2002 Tourism Features Inventory and Mapping Update

The Consulting Team used an updated version of the Ministry of Forests Recreation Features Inventory as a main data source for the Tourism Features Inventory for the 2002 TRI. They supplemented this source with digital air photos, guidebooks, brochures, LRMP documents, topographic maps, satellite images and operator and club interview results conducted for this study.

The tourism features, in point, line, and polygon form, were derived from the above data sources and were delivered as per the Digital Data Standards for a Community-Scale Tourism Opportunity Study, March 2002 specifications. The resulting hard copy maps presented the features under the following categories:

- Water Features;
- Land Features;
- Wildlife Features; and,
- Cultural Features.

Deliverables of the Tourism Resource Inventory update include:

- database of tourism operators, facilities and recreational clubs that are use the Study Area;
- tuar_cord.e00 – ArcInfo export coverage of tourism use, as a region coverage;
- tfc_cord.e00 – ArcInfo export coverage of tourism facilities, as a point coverage;
- tfp_cord.e00 – ArcInfo export coverage of tourism point features;
- tftl_cord.e00 – ArcInfo export coverage of tourism line features;
- tfta_cord.e00 – ArcInfo export coverage of tourism polygon features; and
- hardcopy maps and hp2 plot files:
 - Tourism Existing Use and Facilities
 - Tourism Features

Identification and Mapping of Existing and Pending Commercial Recreation Crown Land Tenures

This step entailed identifying and mapping existing and pending Commercial Recreation Tenures. This information was obtained from Land and Water BC. Since the status of Crown Land Commercial Recreation tenures frequently changes, the Consulting Team checked the status of Pending Commercial Recreation Tenures (applications) early in the process, mid-process and prior to finalizing the maps.

The pending tenures were screen digitized from maps contained in the applications' files. The hardcopy maps were of varying scales and it was often hard to determine the exact location of the tenures. Therefore, the pending tenures must be viewed with caution.

Deliverables of the Commercial Recreation Tenures are as follows:

- comrec_appl.e00 – ArcInfo export coverage of pending Commercial Recreation Tenures, and
- Crown Land Commercial Recreation Tenures hardcopy map and hp2 plot file (comrec.hp2).

Identification and Mapping of the Existing (non-tourism and recreation) Crown Land and Resource Tenures

Understanding the current use of land and resources in the Study Area was an important exercise to support the Consulting Team's subsequent analysis of compatibility of these uses with existing and potential tourism and recreation use examined and proposed during this study. It was also important to understand priorities that emerged through the recently completed LRMP process that may lead to future land and resource use decisions. To support this analysis (which took place later in the process), the Consulting Team identified and mapped existing (non-tourism and recreation) Crown land and resource tenures and priorities. Information sources used for this step included:

- LRMP maps and documents;
- MoF maps and documents;
- forest company maps and documents;
- Ministry of Sustainable Resource Management digital data.
- Land and Water BC, Inc.

Geographic locations of these tenures and resource uses were mapped onto the Overlapping Resource Tenures and Land Use map.

Deliverables of the Existing Crown Land and Resource Tenures are:

- Overlapping Resource Tenures and Land Use hardcopy map and hp2 plot file (overlap_tenure.hp2).

Identification of Tourism and Recreation Markets, Trends and Product Quality Expectations

While the above data collection, review and mapping focused on the supply-side, this step involved the collection and documentation of demand-side tourism and recreation market trends and

product-quality expectations. The resulting data and information was crucial to this study, enabling the Consulting Team to assess the supply-side attributes and potential enhancement and development in relation to market demand trends.

This data and information collection entailed:

- reviewing secondary sources (hard copy and Web-based);
- interviewing tourism operators and recreational clubs that use the Study Area;
- interviewing representatives from local and regional Destination Marketing Organizations (DMOs); and
- interviewing North American-based, high-end tour operators that offer nature-based and adventure tours.

Data and information sources included (note that this is not an exhaustive list):

- World Tourism Organization (WTO)
- World Travel and Tourism Council (WTTC)
- The Ecotourism Society (TES)
- The Canadian Tourism Commission (CTC)
- Tourism British Columbia (TBC)
- The Thompson-Okanagan Tourism Association (TOTA)
- Tourism Kelowna
- The British Columbia Tourism Growth Framework (Parts I, II and III)
- Various Web Sites
- Various Reports

2. Preliminary Consultation

Consultation with relevant stakeholders was an important phase of the study. The objectives of the consultation phase were to obtain the following information from a range of stakeholders:

- Viewpoints on the primary challenges and opportunities related to tourism and recreation in the Study Area;
- Specific challenges operators face in developing, maintaining and operating tourism facilities and services;
- Specific challenges recreational clubs face in their use of the Study Area;
- Viewpoints regarding compatible and incompatible use of the Study Area by tourism operators, recreationists, consumptive land and resource users; and,
- Information related to the performance (financial, occupancy rates, market trends, etc.) of tourism operators in the Study Area.

The process used for the preliminary consultation involved:

- Compiling a contact list of key stakeholders (see Appendix A), categorized into the following groups:
 - Government / Tourism Agencies and Organizations
 - First Nations
 - Tourism Operators
 - Recreation Clubs
 - Resource Industries
- Identifying the objectives and methods (in-person, fax, telephone) for consulting with each group;
- Designing an *Issues and Opportunities Survey* (see Appendix C);
- Preparing a *Project Backgrounder*;
- Designing and establishing a *Project Web Site*, including the *Project Backgrounder* and on-line survey; and,
- Conducting the consultation.

The information resulting from this consultation process provided critical information to the Consulting Team, which was subsequently used during the analysis and recommendation phases of the study.

3. Data Analysis

The data analysis involved a series of iterative steps, categorized under:

- Strengths, Weaknesses, Opportunities and Threats (SWOT) Assessment
- Priority Product Determination
- Product-Market Analysis
- Compatibility, Conflict and Issues Analysis

Note that the scope of this project did not include conducting computer-generated product capability models. The analysis involved at each of these stages is described below.

SWOT Assessment

The Consulting Team conducted a SWOT assessment during a broader analysis workshop held on June 28, 2002. Background information for the SWOT assessment included all the information and data gathered during the *Preliminary Data Collection* phase of the project in addition to fieldwork conducted by Consulting Team members. This included careful review of the TRI Existing Use and Facilities (2002), key themes and issues resulting from industry and other stakeholder interviews, a review of the project mapping products displaying overlapping tenures and LRMP zones.

The SWOT assessment applied to the Study Area (which includes all the Crown land in the Central Okanagan Regional District), in addition to the broader tourism destination of the Central Okanagan. The Consulting Team included the broader area in this assessment because tourism

development and activity in the Study Area does and will take place within the larger area. As such, there will likely be varying degrees of interaction between product offerings in the Study Area and in the region as a whole that will influence the type and scale of tourism development in the Study Area.

For the purposes of the SWOT assessment, the following definitions applied:

Strengths: Factors that are positive in terms of existing and potential tourism performance in the destination.

Weaknesses: Factors that negatively affect how the tourism destination does and can perform. Weaknesses are usually internal in nature and can often be addressed through specific interventions.

Opportunities: Factors that present opportunities for enhanced tourism growth for the destination.

Threats: Factors, usually (but not always) external in nature, which present threats to tourism growth and performance in the destination. Typically, threats cannot be easily addressed due to the fact that they are external in origin.

Under each of the above headings, factors assessed were characterized into the following sub-headings:

- Awareness, Markets and Marketing
- Destination Features and Management
- Destination Location and Access
- Products and Facilities
- Infrastructure
- Services
- Institutional and Organizational
- Socio-economic

Priority Product Determination

Prior to identifying priority products, the Consulting Team documented traditional and emerging tourism products and recreational activities for the Central Okanagan broadly, and the Study Area specifically. From this broader list, the team determined product priorities for the Study Area using a Product Evaluation Matrix. This process, evaluates tourism products/activities/services against a series of criteria. It is intended to identify those products/activities that are- based on high quality resources, have market potential, and generate desirable socio-economic benefits. This process is designed to be rigorous and defensible, while being consistent among the range of products. Information to support this analysis was derived during the *Data Collection* phase of the project.

The criteria used in this evaluation are listed below.

Resource Criteria

Quantity: The extent, size or amount of the resource to support the product.

Quality: The quality of the resource from an activity or tourism perspective.

Accessibility: The ease with which the product can be accessed relative to distance, safety, terrain and parking.

Seasonality: The number of months or seasons during which the product can be utilized or offered.

Environmental Integrity: The potential impact on the environment created by the activity. This is also a measure of the environmental sustainability of the activity.

Market Criteria

Existing Market: The importance of the product relative to the region's existing tourism market.

Trends: Consideration of regional/provincial/national/international trends in activity participation.

Market Potential: The potential of the product to attract visitors or increase length of stay based on consideration of resource quality, existing market profile and market trends.

Geographic Origin: The number of visitor markets to which the product appeals. For the purposes of this analysis, the four market categories include: BC; Regional (border states and provinces); North American long haul; and International.

Socio-Economic Criteria

Job Creation: The likely job creation potential associated with expanding the market for each product.

Job Duration: The duration (in weeks/months of the year) of jobs created to support each product. (Should be similar to resource seasonality.)

Tourism Revenue: The amount of revenue generated (or the amount of money spent) by tourists, to participate in the activity. This includes spending on related services generated by the product spending.

Employment Income: The contribution of the product to the generation of employment income based on direct and spin-off job creation.

Product-Market Analysis

Following the determination of priority products for the Study Area, the Consulting Team conducted a comprehensive assessment of each priority product and facility. This involved assessing each product more carefully using data and information collected earlier in the process. Both existing and potential products and facilities were assessed in relation to emerging market demand. This stage also involved careful review of all the mapping products to determine the following:

- Potential locations for new product development (areas with the combination of natural resources, infrastructure and access to support development of the priority facilities and activities/products);
- Issues related to the location and operation of existing facilities and activities; and,
- Potential areas of conflict or incompatible use relating to these locations.

The product analysis framework used for this stage of the analysis documents the following for each priority product or facility type (both existing and potential):

- Product / Facility Description
- Product Characteristics and Trends – BC
- Market Characteristics and Trends
- Other Product Trends – Global, National, Provincial and/or Regional
- Current Status of this Product – CORD Study Area
- Product Development Strengths and Weaknesses – CORD Study Area
- Product Development Opportunities – CORD Study Area
- Policy and Regulatory Implications for the CORD Study Area
- Potential Markets – CORD Study Area
- Key Competition – CORD Study Area
- Possible Locations – CORD Study Area
- Potential Conflicts or Issues - CORD Study Area
- Development Considerations – CORD Study Area
- Product and Facility Linkages

Following this analysis, the Consulting Team refined and documented the product and facility enhancement and development concepts. These concepts were then portrayed spatially on a “Tourism and Recreation Opportunities” map (see Appendix K).

Compatibility, Conflict and Issues Analysis

Through the Data Collection, SWOT Assessment and Product-Market Assessment, the most pressing issues relating to enhancement and development of tourism and recreation in the Study Area were consolidated. Some issues were location-specific, while others were process and policy related and more generalized to the entire Study Area. The Consulting Team examined both sets of issues in more detail.

Following the more detailed examination of the process and policy issues, the Consulting Team developed recommendations on how different stakeholders can address them. Stakeholders include the Central Okanagan Regional District, other government agencies, the private sector, tourism organizations and Destination Marketing Organizations, and recreational clubs. The resulting recommendations were incorporated into the *Crown Land Development and Management Recommendations* section of the report.

For the location-specific issues, the Consulting Team assessed the potential tourism enhancement and development locations proposed in this study relative to existing use by tourism operators, recreationists, and other land and resource users. The following maps were used in this process:

- Recreational Features Map
- Tourism and Recreation Opportunities Map
- Existing Use Map
- Tenures Map

The resulting locations where issues of incompatibility or conflict were highest were documented. The Consulting Team then recommended how these issues can be resolved. In several instances, the process and policy issues were also location-specific.

4. Draft Recommendations And Report

Draft Recommendations and Proposed Product and Facility Enhancement and Development

The data analysis resulted in:

- Goals and objectives for sustainable tourism and recreation in the Study Area;
- Recommendations on how to address process and policy related issues;
- Recommendations on how to address location-specific issues related to incompatible or conflicting use of land and resources, specifically concerning tourism and recreational development, operations and activities; and,
- Proposed product and facility enhancement and development.

At this stage in the project, the Consulting Team refined these goals, objectives, recommendations and development concepts. These were documented in text and, if location-specific, they were also mapped (*Tourism and Recreation Opportunities Map*).

Draft Report

The results of the Data Collection, updated Tourism Resource Inventory, Consultation, Data Analysis and Recommendations formed the basis upon which the Consulting Team prepared the

Draft Report and accompanying presentation maps. The structure of the report is described at the end of this section under *Structure of this Report*.

After preparing the first Draft, the Consulting Team presented the results to the Client Steering Committee. The Client provided feedback following the presentation and a subsequent detailed review of the Draft #1 Report. This feedback was incorporated into the report, resulting in Draft #2 Report.

5. Communications Phase I And II

Phase I: Design of the Communications Strategy

Following production of the draft report, the Consulting Team prepared a Communications Strategy. The purpose of the Communications Strategy was to create broader awareness about this study (e.g., beyond that which was created during the earlier Consultation Stage), solicit feedback on the draft recommendations and encourage buy-in from key stakeholders, particularly those who may be involved in different aspects of the Study's implementation. The Consulting Team designed a strategy with the following elements:

Project Website – the Consulting Team used the Project Website (developed earlier during the Consultation Stage of this project) as a vehicle to communicate the results of the study and to advertise the Open Houses. To this end, an Executive Summary of the Draft Report was posted on the Website, in addition to a form for stakeholders to provide on-line feedback.

Open Houses – the Consulting Team prepared for two open houses – one restricted to tourism and recreation stakeholders and the other a more general, open house for a broader audience. Preparation steps included:

- Confirming dates and locations for the two open houses;
- Preparing an invitation list and invitations for the tourism and recreation stakeholders open house and issuing the invitations;
- Advertising the more general open house on the Project Website; and,
- Preparing the open house materials: Purpose and agenda; Executive Summary handouts; presentation maps, and feedback forms.

Phase II: Implementation of the Communications Strategy

Phase II of the Communications Strategy entailed conducting the two open houses. [Further description will be provided once the open houses are complete.]

6. Final Report And Mapping Deliverables

Based on the feedback from the open houses, the Project Website and the Client Steering Committee, the Consulting Team finalized the Report and the mapping deliverables.

Appendix E Existing Operators, Clubs and Facilities Data Base

Central Okanagan Crown Land Tourism & Recreation Study									
Existing Operators, Clubs and Facilities Data Base									
Identifier	Name of Business or Organization	Contact Name	Address	City & Province	Postal Code	Phone	Fax	E-Mail	Acc Type Code
CORD-CLI-1	Beaver Lake Mountain Resort	Alex Bussmann	6350 Beaver Lake Rd.	Winfield, BC	V4V 1T7	250-762-2225	None	None	AO04
CORD-CLI-2	Postill Lake Lodge	Dave Cory Goldfinch	Box 854	Kelowna, BC	V1Y 7P5	250-212-0579	250-212-0579	None	AO04
CORD-CLI-3	Windsong Farm	Ingrid Dicks	2715 Hewlett Road	Kelowna, BC	V1W 4B4	250-762-4846	250-762-4747	None	AO09
CORD-CLI-4	Camp Dunlop	Jim Cronin	5325 Lakeshore Road	Kelowna, BC	V1W 4J3	250-764-7646	None	jcronin@direct.ca	AO07
CORD-CLI-5	Chute Lake Resort	Doreen Reed	797 Alexander Ave	Penticton, BC	V2A 1E6	250-493-3535	250-496-4017	chutelake@vip.net	AO04
CORD-CLI-6	Eight Mile Ranch	Kim Stinson	5983 Hwy 33E	Kelowna, BC	V1P 1H8	250-765-0177	250-765-8008	kim@eightmileranch.com	AO08
CORD-CLI-7	Silver Lake Forest Education Society	Jim Harnden	Box 20023 T.C.M.	Kelowna, BC	V1Y 9H2	250-717-0033	250-717-3231	silver@silk.net	A04
CORD-CLI-8	Lake Okanagan Resort	Loreen Rualt	2751 Westside Road N	Kelowna, BC	V1Z 3T1	250-769-3511	250-769-6665	info@lakeokanagan.com	AO01
CORD-CLI-9	McCulloch Lake Resort Ltd.	Nancy & Jim Pollard	9995 McCulloch Road	Kelowna, BC	V1P 1K3	250-862-7834	250-862-7834	None	AO04
CORD-CLI-10	Crux Climbing Centre	Glen	2 - 1414 Hunter Court	Kelowna, BC	V1X 6E6	250-860-7325	None	None	
CORD-CLI-11	GeoQwest Excursions	Steve Noakes	1734 Keloka Drive	Kelowna, BC	V1Z 2X1	250-769-0031	250-769-0031	snoakes@okanagan.net	
CORD-CLI-12	Monashee Adventure Tours	Ed Kruger	1591 Highland Drive North	Kelowna, BC	V1Y 4K6	250-762-9253	None	info@monasheeadventuretours.com	
CORD-CLI-13	Off the Beaten Track	Joel Rodda	361 Beach Avenue	Kelowna, BC	V1Y 5R7	250-762-9460	None	None	
CORD-CLI-14	Tykes Can Tour	Joe Kyle	775 Camelia	Kelowna, BC	V1X 3M9	250-762-9216	None	tykescantour@shaw.ca	
CORD-CLI-15	First Cast Trout Shop and Guide Service	Brad Tomnuk	6350 Beaver Lake Rd.	Kelowna, BC	V4V 1T7	250-878-4225	None	firstcast@silk.net	
CORD-CLI-16	Okanagan Adventure Co.	Leah Thatchuk	1330 Water Street	Kelowna, BC	V1Y 9P4	250-491-9155	250-491-9175	leah@northwestgolftours.com	
CORD-CLI-17	Okanagan Wine Country Tours	Patricia Petreau	PO Box 22029, Capri Postal Outlet	Kelowna, BC	V1Y 9N9	250-868-9463	250-868-9464	winetours@silk.net	R11
CORD-CLI-18	Nordic Ski Club	Ross Sutcliffe	PO Box 105 PBC	Kelowna, BC	V1Y 7N3	250-769-5158	250-762-4266	wemigh@silk.net	
CORD-CLI-19	Back Country Horseman of BC	Isabel Pritchard	2080 Saucier Road	Kelowna, BC	V1W 4C1	250-764-4533	250-764-4536	None	
CORD-CLI-20	Kelowna Dirt Bike Club	Terry Burke	Box 2643 Stn. R.	Kelowna, BC	V1X 6A7	250-765-3436	250-765-3436	tscomputers@telus.net	
CORD-CLI-21	Rock and Gem Club	Ken Dewerson	338-2330 Butt	Westbank, BC	V4T 2L3	250-707-0618	None	dewerson@shaw.ca	
CORD-CLI-22	Fish and Game Club	Rick Percival - Range Manager	4041 Casorso Road	Kelowna, BC		250-764-7558	None	rick&ann@telus.net	
CORD-CLI-23	Telemark Cross Country Ski Club	Clive Gilbert	PO Box 26072	Westbank, BC	V4T 2G3	250-769-4406	None	bcgilbert@shaw.ca	
CORD-CLI-24	Lonely Loon Fly Fishers Club	Terry Tranfeld				250-548-3349	None	None	
CORD-CLI-25	Kelowna ATV Club	Cole Haddad				250-861-5916	None	None	
CORD-CLI-26	Hiking Club	Ross Sutcliffe	PO Box 105 PBC	Kelowna, BC	V1Y 7N3	250-769-5158	250-762-4266	wemigh@silk.net	
CORD-CLI-27	Business - Stable (Laurian Quarter Horses)	Laurie Takoff	2880 Schram Road	Kelowna, BC	V1P 1K2	250-765-7228	250-765-7228	laurianquarterhorses@telus.net	
CORD-CLI-28	Okanagan Hiking Club	Ross Sutcliffe	PO Box 105 PBC	Kelowna, BC	V1Y 7N3	250-769-5158	250-762-4266	wemigh@silk.net	
CORD-CLI-29	Crystal Mountain								
CORD-CLI-30	Kelowna Mountain Bike Club	Don Billard	Box 25050 Mission Park	Kelowna, B.C.	V1W 3Y7	763-6562		mail@kmbc.ca	
CORD-CLI-31	Dee Lake Resort		10250 Dee Lake Road	Winfield, BC	V4V 1T5	212-2129	860-4938	dee_lake_wilderness_resort@hotmail.com	AO04
CORD-CLI-32	Jackpine Lake Resort								
CORD-CLI-33	Oyama Lake Resort	Wayne Ruf	7425 Oyama Lake Resort	Winfield, BC	V4V 2C9	862-1013			AO04
CORD-CLI-34	Mandy & Me Trail Riding		174 Bear Creek Road	Kelowna, BC	V1V 1N2	769-5735			
CORD-CLI-35	Outbound Cycle & Sport		2417 Main Street	Westbank, BC	V4T 2H8	768-0799			
CORD-CLI-36	Idabel Lake Resort	Paul & Vivian Burrige	4-12000 Hwy 33E	Kelowna, BC	V0K 2J0	250-765-9511	250-765-4509	idabel@telus.net	AO04

Tour Type Code	Primary Activities Offered/Sold	Secondary Activities Offered/Sold	Capacity	Business/ Organization Type	Land Status	# of Years Operating
	K00/K01/K04/F00	F01/F02/I01/I02/I03/I04/N00	16 Cabins, 40 Campsites, Total 250 at-one time	PROFIT	LEASE	82
	K00/K01/K04/F00	F01/F02/I01/I02/I03/I04/N00	15 Units, 10 Campsites	PROFIT	LEASE	55
	I00	N00	5 Units	PROFIT	PRIVATE	5
	I00	F01/F02/I01/I02/I03/I04/N00	100 tent sites with 1 large lodge, 2 cabins at Hydraulic Lake	NPO	PRIVATE	20
	K04	I01/I02/I04/N00	12 trailer sites, 10 tent sites, 7 cottages	PROFIT	LEASE	30
	I03/K01/K04	N00/Q00	2 cabins, campsites	PROFIT	PRIVATE	10
	N01/B02/I01/I04/K04	E00/K00/F00	84 campers divided into 5 cabins	NPO	MIXED	31
	I00	F01/F02/I01/I02/I03/I04/N00	100 Rooms	PROFIT	PRIVATE	20
	K00	F01/F02/I01/I02/I04/N00	6 cabins, 1 4-plex chalet, dining room - seats 45	PROFIT	LEASE	20
R16	R03	N00	30 climbers	PROFIT	MIXED	5
R11	M03	N00/F00/G04/K03/Q00	up to 7 people	PROFIT	MIXED	1
R15	I02	D08/K03/N00/K04	65 people	PROFIT	MIXED	9
R11	M03/I02	D08/N00		PROFIT	MIXED	3
R15	I02	D08/K03/N00	10 people	PROFIT	MIXED	5
R04	F00/F20	N00/K03	Up to 50	PROFIT	LEASED	5
R15/R11	I02	D08/K03/N00/K04	No specific capacity - they manage/organize tours with other operators	PROFIT	MIXED	8
	M00	D08/K03/N00	additional vehicles rented for groups of 20+	PROFIT	MIXED	
R18	D01	I01	750 members	NPO	LEASED	37
R17	I03	N01	100 members	NPO	MIXED	11
	M02	M01	500 members	NPO	LEASED/MIXED	30
R06	G06	N01	40 members	NPO	LEASED/MIXED	30
	H00	K03/I04/Q09	500 members	NPO	LEASED/MIXED	100
R18	D09	D01	650 members	NPO	LEASED	30
R04	F20	F02	38 members	NPO	MIXED	38
	M01	N00	250 members	NPO	MIXED	2
R11	I01	N01/K03/Q08/Q09	200 members	NPO	MIXED	20
R17	I03	N01/K03/Q08/Q09	8 people	PROFIT	MIXED	25
R11	I01/I04	N00	320 members	NPO	MIXED	40
	I02	N01		NPO	MIXED	10
	K00/K01/K04/F00	B03/I01	20 cabins and 10 campsites	PROFIT	LEASE	70
	K00/K01/K04/F00	F01/F02/I01/I02/I03/I04/N00	9 cabins and 8 campsites	PROFIT	LEASE	30
R17	I03	N01/K03/Q08/Q09	15 people	PROFIT	MIXED	10
R15	I02	D08/K03/N00/K04	10	PROFIT	MIXED	9
	K00	F01/F02/I01/I02/I04/N00	8 cottages, 6 suites in lodge		LEASE	30

Appendix F Economic Impact Methodology

To initiate the process for determining the tourism spending impact of existing Crown land in the Study Area, the ten accommodation facilities that currently exist on Crown land within the Study Area were reviewed. Six of these facilities include both resort/lodge room rentals and camping/trailer sites, while the other four are province-owned campgrounds located in provincial parks. In total, the ten facilities include 75 room units (resort/lodge rooms), while the camping/trailer sites total 505 sites (363 of these sites are province-owned campsites). Some properties are open year-round, while others are only available for a select season (usually May through October, but also the key cross-country skiing months of December through March).

Occupancy rates for resorts/lodges were estimated using 2001 Pannell Kerr Forster estimates for rural BC communities (the last full calendar year). As campground locations and amenities tend to vary greatly, occupancy rates for non-provincial park campgrounds were estimated using average occupancy rates from the four provincial park campgrounds. Parks BC provided data on actual Provincial Park overnight camping usage. Parks BC also reports that virtually all overnight campground usage occurs between the months of April and October. Therefore, the number of operating days for private campgrounds (although some were reported to be open year-round) was limited to these months.

Determining the average room rates for the six resorts/lodges began with reviewing each facility's information in the *2001 British Columbia Accommodation Guide* (the last full calendar year). Property rack room rates range from a low of \$30 per night to a high of \$150 as the quality of rooms varies substantially not only between each facility, but within each facility (most resorts have a range of accommodation from lodge rooms to separate cabins). After reviewing each resort/lodge's web site and contacting each site by phone to confirm their lodging types, an average room rate was determined for each (ranging from a low of \$40 for one property, to \$85 per night for another). Combining average room rates weighted for the number of rooms available for the entire region, the average room rate for the region was estimated to be approximately \$73. Using a similar process for campgrounds, site rental charges range from \$13 to \$18.50, or an average of approximately \$17.00.

The estimated revenue generated by resorts/lodges and campgrounds on Crown land within the CORD region for the year 2001 is estimated at \$1.6 million. A summary of the analysis is displayed below.

Table 1 – Revenue Generated by Accommodation in the Study Area (2001)

	# of Rooms/Sites	Est. Average Annual Occupancy	# of Rooms/Sites Sold	Est. Average Room/Site Rate	Est. Revenue Generated
Resorts/Lodges	75	55.6%	9,882	\$72.89	\$720,363
Campgrounds	505	51.1%	51,368	\$17.08	\$877,569
Total	580		61,250		\$1,597,932

Source: *British Columbia Accommodation Guide 2001/2002*, phone calls to owner/operators, operator/BC Parks websites, and Pannell Kerr Forster Consultants Ltd.

Note that one cannot simply multiply the numbers across each row of the table above to determine the estimated revenue generated. The main reason for this is that occupancy rates were estimated only for the months each facility was open (over a calendar year, these occupancy rates would likely be much lower), which varied greatly between each property. Due to the limited number of properties and to protect their confidentiality, individual property data describing the number of rooms/sites and operating days could not be listed.

Although the above methodology is defensible in terms of estimating the value of tourism accommodation, its major limitation is that it does not account for visitors who, for example, arrive in the region by personal vehicle and choose to camp at a non-designated campground. From an economic impact perspective, however, this omission is unlikely to be significant as this travel group is believed to have very limited economic impact on the region. It should also be noted that the methodology used focuses on visitor spending impacts only and does not address tax, land lease revenue, or other impacts.

Using the above accommodation spending data as a base, the proportional spending breakdowns identified in the *1995-96 British Columbia Visitor Study for the South Thompson-Okanagan* region were applied against the accommodation spending figure to estimate total tourism spending. The 1996 study estimates by spending category are provided in the following table. As the figures indicate, accommodation accounts for a sizeable proportion of visitor expenditures (17%). It should be noted that although homes of friends and relatives is not included as an accommodation category in the table, the accommodation percentage in column two accounts for this accommodation category and, therefore, has no impact on the spending calculations presented in the third column (that is, travelers staying with friends and relatives are included in the survey sample, and their spending is including in the following calculations).

Table 2 – Estimated Visitor Spending in the Study Area (2001)

	Proportion of Visitor Spending	Total Spending Estimate
	(%)	(\$)
Food and Beverage	35%	\$3,290,000
Accommodations	17%	\$1,598,000
Transportation	16%	\$1,504,000
Souvenirs and Gifts	5%	\$470,000
Package Tours Purchased in BC*	X	X
Outdoor Activities	8%	\$752,000
Attractions and Cultural Events	6%	\$564,000
Other Expenses	13%	\$1,222,000
Total		\$9,400,000

Source: 1995-1996 British Columbia Visitor Study – The South Thompson-Okanagan Visitor Report

Note: Proportion of Visitor Spending percentages are representative of BC resident expenditures for the region (this value most accurately represents expenditures in the region).

* Package tour expenses were considered pre-trip expenditures and were not included in the visitors' expenditures while traveling in BC.

Using the above spending distribution table, the tourism spending impact as a result of existing Crown land within the CORD region is estimated at \$9,400,000.

Based on a provincial average of one job for every \$85,000 in tourism spending (based on provincial tourism spending and job estimates)², the number of jobs (full time equivalent) attributed to tourism within the Study Area is 110.

² Tourism revenues for the province of BC were \$9.5 billion in 2001, with total employment equating to approximately 112,000 full time equivalent jobs (FTE) (source: Tourism BC, The Value of Tourism, Feb 2002). This results in the equivalent of one job for every \$85,000 in visitor spending. Applied to the analysis in this section of the report, the \$9.4 million in tourist expenditures for the Study Area divided by \$85,000 equates to 110 jobs (FTE).

Appendix G Tourism and Outdoor Recreation Trends

Global Tourism Trends

Tourism is one of the fastest growing industries in the global marketplace. Understanding the global trends affecting the supply and demand for tourism products and activities provides important context for the successful development of tourism in the Study Area. The following pages provide a summary of important emerging global trends in five major categories: consumer trends, commercial trends, technological trends, competitive trends and destination trends.

Emerging Consumer Trends

Demand for More Enriching Travel Experiences

There is growing demand for more “complex” tourism products, reflecting a trend away from the simple “sun, sea and sand” vacation of the past to more experiential vacations. David Allen, the Minister of Tourism for Bermuda, stated that, “More and more North Americans and Europeans, particularly those of the Boomer generation, are looking for more enriching and even esoteric vacation experiences and those destinations that provide these, whether through increased educational experiences, such as ecotourism and cultural tourism activities, or through facilities and activities associated with personal wellness, such as spa programs, for example, will stand the best chance of capturing this lucrative market with high discretionary income.”

Understanding the changing habits and preferences of different market segments, in particular those of the maturing baby boomers, will be important for tourism destinations /jurisdictions wishing to remain competitive in the global travel market.

Demand for Ecotourism, “Learning” Tourism, Cultural Tourism, Agri-Tourism and Health-Related Tourism

In line with emerging interest in more enriching travel experiences, is demand for ecotourism, “learning” tourism, cultural tourism, agri-tourism and health-related tourism opportunities. While demand for each of these product areas is increasing, there is also growth in specialized and integrated products offering “immersion” experiences. Emerging immersion product opportunities may include a combination of elements, such as: cultural and heritage trips to historic sites, museums and/or art galleries integrated with soft adventure activities such as hiking and/or bicycle tours; aboriginal and cultural tourism experiences combined with opportunities to mix with local people and try indigenous cuisine, as well as interpretive wildlife viewing and nature photography; family renewal travel experiences that combine educational study tours and agri-tourism vacations; short-break vacations involving cultural, sporting and nature-based edu-tainment packages where transportation, accommodation and flexible dining experiences are packaged with interpretation services.

Demand for Products that Maintain Environmental Values

Travellers are increasingly seeking products that maintain a destination's environmental values and are becoming more experienced and well-read. They are increasingly aware of the environmental practices used by both the tourism and natural resource industries in potential travel destinations. This knowledge is predisposing them to select destinations that provide healthy environments in which to pursue their tourism activities.

Demand for Multiple-Activity Destinations

Travellers are increasingly seeking multiple-activity destinations. In many cases, opportunities for accessing a wide range of stimulating and challenging activities are second only to natural setting in influencing travel decisions.

Trends in Family Tourism

It is estimated by the Canadian Tourism Research Institute's Summer 2002 Travel Intentions Survey that in 2002, 65% of Canadian families with children will travel. With nearly 7.93 million families with children under the age of 19 in Canada, the tourism industry can expect as many as 5.15 million household vacations this year. According to Panel Kerr Forster, the events of September 11th have made North Americans realize the importance of family, and as a result travel in the foreseeable future, will be a family affair.

Most of these families will travel by car and will be attracted to destinations that are easily accessible and who provide good service at a moderate price. Product flexibility is also important. The most successful family tourism operations will provide a complete family vacation experience, either incorporating all the amenities (accommodation, meals and recreational activities) into one, or partnering with local operators who can provide the necessary extras. Partnerships are especially important in rural or backcountry areas where tourism facilities are more diverse and scattered.

Increasing Consumer Expectations / Discriminating Tastes

Travellers are exposed to ever-increasing amounts of information about tourism product offerings around the world through mass media, enhanced telecommunications and, in particular, the Internet. Armed with better and more accessible information, consumers are becoming more selective about the travel choices they make. Competition for this more discriminating market is increasing, with some jurisdictions / destinations dedicating substantial resources to understanding and meeting the preferences and needs of these travellers.

Product Branding

Product branding is a strategic tactic being pursued by a growing number of industries worldwide, including tourism. There is competition to ensure companies obtain the greatest visibility for their particular brand. Within the tourism industry, branding provides a means for consumers to differentiate between products in an environment that is producing an ever greater number and diversity of products and greater volumes of information about those products. However, while many larger tourism companies/ businesses have invested in branding, most smaller tourism businesses – which comprise a large portion of the industry – are missing valuable market positioning opportunities by not engaging in brand development.

Shorter Holidays

The trend toward travelers taking shorter, more frequent vacations will continue. This trend reflects the interest of urban professionals in taking short vacation breaks from high-stress jobs. Such travelers are part of a growing and large market segment characterized as “time poor” and “money rich”. Booking lead-time for these travelers is also decreasing, particularly because of the emergence of Internet bookings.

Safety and Security

As never before, travelers are seeking relative safety and security in their destination choices. This includes protection from crime, transportation safety, terrorism, political disturbance, as well as protection from potential health problems. Perceptions of relative safety or danger are becoming an increasingly important part of people’s travel destination decision-making process.

Importance of “Word of Mouth” Marketing

“Word of mouth” has always been an important marketing vehicle. With the advent of the Internet and other instant communication channels for product testimonials, the importance of “word of mouth” is becoming increasingly important for tourism businesses and destinations.

The Advent of Global Market Segments

With the growing trend toward globalisation of economies, the importance of defining tourism markets by shared interests is increasing. The New Zealand tourism strategy highlights this perspective: “...‘globalisation’, and the development of world-wide ‘communities of interest’, demand that we think differently about how markets are defined and approached. By 2010, where we market to (i.e., which countries) will be less relevant than who we market to (which consumer segments)”³.

³ *Tourism 2010, A Strategy for New Zealand Tourism, Industry Discussion Document, 1999.*

Credit Card Use

Credit card use is increasing, not only as a method of payment, but also as a means for personal identification (ID cards). Credit card companies are becoming significant players in the direct marketing of tourism products and destinations. In addition, they are becoming increasingly important and influential sponsors of global travel and tourism events and major partners in frequent traveler alliances.

Emerging Commercial Trends

Airline Alliances

Airline alliances and associated frequent flyer programs are increasingly influencing travel destination decisions. Paralleling this growth is the increasing importance of frequent flyer programs in global direct marketing activities and databases.

Airline Restructuring

Major airlines are undergoing significant internal changes. At the same time, emerging airlines are operating a growing number of lower traffic routes to small regional airports that cannot be served by the larger airlines.

Growth in Traditional and Non-Traditional Partnerships

Inter and intra-industry alliances -- such as those reflected by marketing convergences between financial companies and hotels, supermarket chains and airlines, or oil companies and national tourism organizations -- are increasing. Travel and tourism which can involve many other industries and sectors are beginning to capitalize on the synergies of such partnerships.

Industry – Government Partnerships

Public-private sector partnerships within tourism jurisdictions are on the rise. These alliances are creating opportunities for more effective and efficient means of product distribution, cost-control, tourism product development, market identification and marketing activities.

Buying Direct

There is a growing trend toward direct purchase/booking of airline tickets, travel packages, and accommodation over the Internet. As consumers become more comfortable with e-commerce, even greater direct purchases of tourism products and services will occur. This trend will require shifts in the way the travel trade conducts its marketing and sales strategies.

Emerging Technological Trends

Growing Internet Use

Internet use continues to grow and its importance to the travel industry is becoming increasingly significant in terms of intelligence gathering, information dissemination and, gradually, sales. Although the number of Internet users worldwide has doubled in the last two years, most consumers are still reluctant to buy products on-line. Only about 3% of all travel bookings are currently made on-line. In the US, Internet usage is higher among leisure travelers today than in 2001, however, 30% of these travelers still use a travel agent to book their trips. Those who do purchase on-line are typically not impulse shoppers, but rather they research various options before making their final travel purchase. In fact 90% of leisure and business travelers indicate that the web site feature they value most is being able to check the lowest rates for airfare, hotels and car rentals.⁴

However, the number of travelers making on-line purchases is expected to increase as on-line shopping becomes more mainstream over the next decade. A shakeout in the marketplace is expected as those destinations and travel businesses which have developed on-line distribution and sales channels compete for market share.

Emergence of “Smart Cards”

Technologies such as smart cards will give consumers more choice in how they pay for goods and services. Once smart cards are integrated into the Internet network, travelers will be able to purchase and transfer funds around the world. The principal advantage of such technology for travelers is additional choice and convenience. Without proper services and organization of information on-line, product suppliers will not be able to interact with tomorrow’s travelers.

Implementation of the Nexus Program⁵

Since the terrorist attacks of September 11th, four Canada/US border agencies including Canada Customs and Revenue Agency (CCRA), Citizenship and Immigration Canada (CIC), United States Customs Service (USCS), and United States Immigration and Naturalization Service (USINS), have been working towards increased security measures and improved traffic flow for the borders. The Nexus program, initiated in Southern Ontario, is to be implemented at three border crossings in BC: the Pacific Highway/Blaine, the Douglas Peace Arch and the Boundary Bay/Point Roberts crossings. The program will facilitate the flow of low-risk travelers while focusing resources on higher risk traffic. For the tourism industry, this program should ease the frustration travelers feel when forced to wait in lineups at the border, and encourage increased visitation.

⁴ Yesawich, Pepperdine and Brown, *National Travel Monitor*, April 2002.

⁵ Canada Customs and Revenue Agency website www.ccr-aadrc.gc.ca/customs/individuals/nexus/

Participants in the program are pre-approved for the use of dedicated Nexus lines at the border crossings through a system of biometrics including fingerprinting and possibly iris scanning. Over 189,000 applications have been received and are in the middle of being processed. The system should be fully operational by the end of July.

Emerging Competitive Trends

Increasing Competition

Paralleling continued growth in global visitor volume and revenue is increased expansion in the number and diversity of tourism product offerings throughout the world. This includes not only the enhancement of existing destinations, but also the development of new tourism centres in developing countries. Consequently, competition for the global tourism dollar is expected to become more intense.

Competition for Capital

Given this increasing interest in developing new tourism products and destinations, competition for investment capital is also growing.

Competition for Discretionary Funding

Tourism businesses and destinations compete amongst themselves for the consumer's discretionary dollar. However, as an industry, they also compete with the full-range of consumer products on the market – the new car, home furnishings, computers, cell phones, etc.

Importance of Research

Given the different types and increasing intensity of tourism competition, national tourism organizations, airlines, hotels and other industry players are recognizing the need for research to better identify, tap into and understand markets and customers. Successful destinations are engaging in ever-increasing levels of intelligence gathering as part of their product and marketing strategy development activities.

Determining the Value of Tourism (Emergence of Satellite Accounts)

A growing number of countries / jurisdictions / destinations are determining the value of tourism to their economies using more consistent and rigorous methodologies. For example, the Canadian Tourism Commission (CTC) and the World Travel and Tourism Council (WTTC) have developed Tourism Satellite Accounts (TSAs) to measure tourism's contribution to the economy. The WTTC TSA is being applied to a growing number of countries around the world, allowing these destinations to rigorously state the value of tourism to their government and private sector partners. This is helping them build cases for increased government investment in the tourism industry based on credible data about existing and potential economic and employment benefits.

Intelligent Taxation

Government taxation of the tourism industry and visitors affects the competitiveness of the industry. An increasing number of countries are critically examining taxation policies to ensure the tourism industry, and ultimately the area's economy, is not being adversely impacted by poorly conceived taxation policies. There is a growing need to assess the real costs and benefits of increasing government revenues through tourism industry taxation in relation to how it impacts the destinations' overall competitiveness.

BC's Community Charter

This draft document, created by the BC Government under the guidance of the Community Charter Council and in consultation with hundreds of members of local governments, has been created in an attempt to redefine the relationship between the province and its municipalities, and to provide increased autonomy and accountability at the municipal level of government. The Community Charter legislation, tabled May 28, 2002, will provide local governments with greater and more modern regulatory powers, the possibility of new revenue sources, and a more respectful, joint-interest driven relationship with the provincial government. The Charter identifies several potential municipal revenue sources including:

- Fuel tax,
- Resort tax,
- Local entertainment tax,
- Parking stall tax,
- Hotel room revenue tax,
- Road tolls, and
- Fees as a tax.

These potential sources are suggested to alleviate the reliance on property taxes for municipal revenue, however, the implementation of any or all of these taxes may have a significant negative impact on the tourism industry.

Training and Education

Paralleling growth in the global tourism industry is an increasing need for a well-trained work force. This is an issue in countries / areas where tourism development is quite new as well as in developed countries where there is growing competition amongst many industries and sectors for an increasingly scarce labour supply. With a growing number of people being drawn to employment in the high-tech sector, better training and education is required to ensure that others in the labour force are well-equipped and motivated to work in the tourism industry.

Emerging Destination Trends

Congestion and Overcrowding – Tourism Impacts

With growth in visitor volumes, many destinations are experiencing congestion and overcrowding, particularly during their high-season periods. This can negatively impact destinations and visitors in several ways, including: strain on community infrastructure (roads, sewer systems, etc.); stress on the natural environment; pressures on an area's cultural integrity; shifts in local residents' attitude toward visitors; and effects on visitor experiences. A growing number of destinations are seeking effective ways of managing such visitor flow issues in a sustainable fashion.

Sustainability

Destinations are becoming increasingly aware of the need to encourage tourism growth that is socially, environmentally, culturally and economically sustainable. A growing number of destinations are developing growth management systems to ensure that tourism occurs in more sustainable forms.

Destination Character

Industry and product developers, in addition to strategic planners, are focusing more attention on building or enhancing the character of their destinations and products. Authenticity and "sense of place" are becoming critical competitive advantages for destinations. Without character, image is only a bubble that can be burst with inauthentic experiences at the destination.

Destination Preferences

Research by DK Shifflet & Associates, in March 2002, shows that 40% of US travellers feel that it is very important for them to be in charge of their own transportation, and that 15% of Americans plan to travel to Canada in the near future. This mindset will benefit Canadian markets close-to-home for US travellers.

Canada, and BC in particular, are in good position to take advantage of the results presented in the Yesawich, Pepperdine and Brown 2002 National Travel Monitor revealing the types of destinations that consumers would prefer to visit. These types include:

- "never been to before" – 81%
- beach experiences – 67%
- Visiting arts/architectural and historic sites – 51%
- Destinations that are remote and untouched – 46%
- Theme parks – 45%

BC's vast amount of unpopulated territory, as well as its abundance of natural beauty should be developed and marketed in answer to the demands of travelers.

North American Outdoor Recreation Trends

A review of secondary source information suggests that both outdoor recreation and adventure recreation participation rates and opportunity types are increasing. Outdoor recreation typically includes activities such as walking, swimming, picnicking and fishing while adventure recreation typically includes activities with a greater spectrum of risk and effort such as backpacking, whitewater boating, camping and photo safaris. Participation in outdoor recreation/adventure activities is heavily influenced by socio-economic trends, opportunity trends, technological trends and societal trends. Some of the key trends are summarized below.

- The North American population is growing, aging, getting wealthier, and seeking family bonding activities. As a result, people are continually looking for new places/space to participate in outdoor activities, activities suitable for older people, higher end activities, and activities of interest to family groups.
- In terms of opportunity trends, the types of outdoor recreation/adventure opportunities that become popular in particular areas are directly dependent on the suitability of landscapes and facilities to undertake that activity as well as appropriate access to these landscapes.
- Technology trends serve as enablers for many outdoor recreation/adventure activities by improving associated access, comfort, safety, communication and information that, in turn, enhances participation rates. For example, someone may learn of a potential heli-hiking opportunity via the Internet (communication), be able to access this opportunity via plane/helicopter (transportation), carry a light-weight tent in a backpack with an internal frame (comfort) and carry a cell phone in the event of a problem (communication).
- Of particular relevance to the Study Area is the increasing role of forests in hosting a growing variety of recreation activities. According to a paper entitled *Developing Decision Support for Forest Recreation Management*, "The demand for virtually all forms of forest recreation has grown exponentially during the second half of the 20th century and is expected to continue to growth. Demand is particularly high in summer, but other seasons are gaining rapidly in popularity, especially as technology opens new opportunities."⁶
- It is important to note that it is not only the remote forest areas that are experiencing increased use (and pressure) but also the parks, forests and recreation areas close to communities. This trend has resulted in higher use of public lands and a noticeable increase in participation in recreation activities that can be done in an urban setting.

⁶ Hoffman, Robin E., Twery, Mark J., More, Thomas A. (USDA Forest Service). *Developing Decision Support for Forest Recreation Management*. 2001

In 1999, the American Recreation Coalition (ARC) confirmed that participation in outdoor activities is on the rise when they published the results of the ORCA Recreation Roundtable⁷. These results indicated that the number of people who participate in outdoor recreation at least once a month had increased by 10 points to 67% over the previous year while 24% of the public participate in outdoor recreation “several times a week”, which is four points higher than the previous year and nine points higher than 1994 – the year of the first Recreation Roundtable study.

The ARC identifies the following key outdoor recreation trends:

- Young adults with annual household incomes of US\$50,000 or more are more inclined than the total public to frequently engage in outdoor activity (77% versus 67%);
- Frequency of outdoor activity appears to increase as household income increases;
- The most socially and politically active people are also the most recreationally active;
- Participation in outdoor recreation by middle income families has increased notably;
- People’s favourite outdoor recreation activities have remained the same for several years and include walking, swimming, driving for pleasure, picnicking and fishing;
- Other activities that are increasing in popularity include boating/rowing activities (motor boating, canoeing/kayaking, water-skiing), mountain biking, snowboarding, RV camping and motorcycling; and,
- The key reasons to participate in outdoor recreation are fun, fitness and family following by relaxation and health and exercise.

Although these trends specifically refer to the American market, it is safe to infer that the same general trends also apply to the Canadian market.

British Columbia Tourism Trends and Priorities

Despite the events of September 11th and the impacts of a recessed national and international economy, the tourism industry in BC continues to perform well, albeit with slower growth than forecast before these events. According to Tourism BC, in 2001 the province hosted approximately 22.4 million overnight visitors who generated \$9.2 billion in tourism revenue.

Table 6 and 7 summarizes visitor volume and revenue for BC for four broad geographic markets. Current projections for 2002 show a decline in both visitor volume and revenue. The tourism industry is closely tied to overall economic performance in a region. Due to the fact that full economic recovery is expected by the latter part of 2002 or early 2003, the tourism industry can also expect to resume its historical growth patterns at that time. Until then, consumers are showing caution with their discretionary spending and are demonstrating a preference to stay close to home.

⁷ American Recreation Coalition. *Outdoor Recreation in America 1999: The Family and the Environment*. 1999. P. 4.

Table 1 – Overnight Visitor Volume (000)

Origin	1996	1997	1998	1999	2000	% of Total	% Change 96-2000	2001 (est.)	2002 (forecast)
N. America	19,502	19,709	20,258	20,600	20,801	92%	6.7%	20,748	20,603
Asia Pacific	897	907	774	843	897	4%	0.0%	852	834
Europe	633	616	623	671	666	3%	5.2%	619	608
Other Int'l	110	124	142	144	153	1%	39.0%	143	136
Total	21,142	21,356	21,796	22,258	22,517	100%	6.5%	22,362	22,181

Source: Tourism British Columbia

Note: Approximately 50% of the North American market is comprised of BC residents.

Table 2 – Visitor Revenue (\$ millions)

	1996	1997	1998	1999	2000	% of Total	% Change 96-2000	2001 (est.)	2002 (forecast)
N. America	6,713	6,895	7,254	7,529	7,720	82%	15.0%	7,601	7,436
Asia Pacific	916	942	821	911	984	10%	7.4%	919	894
Europe	630	611	625	683	693	7.3%	10.0%	638	622
Other Int'l	54	62	72	74	79	0.8%	46.3%	74	70
Total	\$8,314	\$8,510	\$8,771	\$9,197	\$9,477	100%	14.0%	\$9,232	\$9,022

Source: Tourism British Columbia

Meeting visitor expectations is of vital importance to encouraging first-time and return visitation to the province. According to research completed in 2001 for the Province of British Columbia⁸, the tourism industry is currently being affected by increasing expectations relating to:

- High-quality tourism products and services;
- Good value-for-money;
- Enriching travel experiences;
- Destinations that are safe, clean and green;
- Convenient transportation to and within destinations; and,
- The ability to use the Internet to find information on destinations and products of interest.

More detailed information on visitor expectations for the province is provided in the *BC Visitors Study – The South Thompson Okanagan Visitor Report*, published in 1998. This study reports the responses provided by visitors to BC who were asked to rate the importance of several factors in their decision to travel, and to indicate their level of satisfaction with those factors. Although this information relates to the province as a whole, it is certainly significant to regional tourism as well.

⁸ “British Columbia Tourism Growth Framework: Part I: Tourism Industry Snapshot”, Province of British Columbia, 2001.

These are important considerations for the Central Okanagan’s tourism industry and related destination marketing organizations to consider in their development and marketing initiatives. The survey results related to visitor expectations are summarized in Tables 8 and 9.

Table 3 – Non-Resident Overnight Visitors Expectations

Expectations	Non-resident Total		Regional Canada		Long Haul N.A.	
	% Very Important	% Very Satisfied	% Very Important	% Very Satisfied	% Very Important	% Very Satisfied
All leisure and business visitors						
- Travelling to a place where I feel safe and secure	53	61	55	52	65	70
- Getting value for the cost of the trip	46	48	50	41	46	52
- Visiting a place that takes good care of its environment	46	67	44	69	51	66
Leisure visitors						
- Resting or Relaxing	58	69	66	66		
- Going to a place that is good for the family	61	88	54	87	79	88
- Experiencing and seeing a mountain area	52	83	45	81	67	87

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998

Table 4 – BC Residents Overnight Visitors Expectations

Expectations	Total		GVRD		South	
	% Very Important	% Very Satisfied	% Very Important	% Very Satisfied	% Very Important	% Very Satisfied
All leisure and business visitors						
- Visiting a place that takes good care of its environment	50	60	49	57	53	66
- Getting value for the cost of the trip	47	64	46	63	46	66
- Learning new things, increasing my knowledge	28	53	26	50	29	54
Leisure visitors						
- Resting or Relaxing	64	81	63	82	66	81
- Going to a place that is good for the family	48	76	47	77	49	80
- Being physically active	45	65	44	62	47	70

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998

Travelers are presented with numerous activities when traveling in BC. Given the Crown land status of the Study Area, outdoor activities are of more relevance than urban activities. As indicated in Table 10, non-residents and residents alike enjoy outdoor activities when traveling in BC. Of special note to this study and the opportunities that exist in the Study Area, is the fact that a significant number of travelers participate in wildlife viewing (50% non-resident, 30% resident), hiking/backpacking (35% non-resident, 22% resident), exploring backcountry wilderness (28% non-resident) and bicycling (22% non-resident, 12% resident). Winter sports are also relatively popular with 16% of non-resident visitors partaking in some sort of winter activity.

Table 5 – Activities by Overnight Visitors

Outdoor Activities in the Province	Non-Resident Total %	Origin			
		Regional Can %	Long Haul N.A. %	Overseas All %	Southern BC Resident %
(Net) Land-based Activities	78	78	81	96	51
- Visiting National/Provincial Park	63	63	67	95	18
- Wildlife viewing/bird watching	50	51	33	78	30
- Camping	31	40	18	25	-
- Hiking/backpacking	35	36	20	51	22
- Exploring backcountry wilderness	28	32	17	34	-
- Bicycling	22	30	7	16	12
(Net) Winter Activities	16	20	3	20	5
- Downhill Skiing/snowboarding	15	20	2	10	5
(Net) Marine-based Activities	20	26	4	21	-

Outdoor Activities in the Province	Non-Resident Total %	Origin			
		Regional Can %	Long Haul N.A. %	Overseas All %	Southern BC Resident %
- Whale watching	16	21	4	20	-
- Ocean boating (sail/power)	6	7	2	4	-
(Net) Freshwater boating (non-res.)	24	27	9	34	-
- Lake boating (sail/power)	20	26	4	19	-
(Net) Fishing	14	15	1	10	14
- Saltwater fishing	7	10	1	1	-
- Freshwater fishing	9	9	1	10	-
(Net) Boating (BC resident)	-	-	-	-	12
Photography	62	62	73	62	35
Swimming	43	49	31	31	-
Golfing	29	38	18	8	7
Sightseeing	-	-	-	-	40

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998

Relevant Strategic Priorities of Tourism BC

Tourism BC was established as a Crown Corporation in 1997 with the mandate of promoting the growth and development of the tourism industry in BC through strategic marketing programs and development initiatives. The *Tourism BC Three-Year Service Plan Highlights 2002/03 – 2004/05* provides some insight into the strategic priorities of Tourism BC over the next few years.

North America is, by far, the most important tourism market for BC generating more than 80% of visitor revenue. Research and experience have lead Tourism BC to focus on the promotion of key products for this market including short stay or get away vacations, and niche experiences such as ski, golf, fishing, guest ranches, spa and outdoor/adventure products.

Getaway business is a key strategic priority for the North American market, especially due to travellers' reluctance to be away from home for extended periods of time since the events of September 11th, 2001. The *BC Escapes* program is ideal for marketing special promotions to the getaway market and it is anticipated that it will continue to be effective as a result of strategic partnering with regional tourism associations, sector associations, and destination marketing organizations.

Revenues and visitor volume from the Asia/Pacific region have decreased over the past couple of years and are forecast to continue to decline through 2002, mostly due to the economic downturn in that area. Tourism BC identifies the continued promotion of touring as the main strategic initiative for the Pacific/Asia region. Touring encompasses activities such as sightseeing, wildlife viewing, soft adventure, fishing, golf, spas and cultural experiences. Active seniors with above average disposable incomes are the demographic target for this type of travel.

Within Europe, Tourism BC will continue to invest in the UK and German markets. The touring product is also popular with these travellers and will continue to be a primary focus of marketing activities. Tourism BC has developed marketing partnerships with the Canadian Tourism Commission, as well as other partners and will continue to participate with them to increase awareness of the products available and to build business in BC.

The following two tables summarize Tourism BC's product marketing focus by broad market regions and the availability of these products in the Central Okanagan. Clearly, the Central Okanagan does offer products upon which Tourism BC is focusing marketing efforts.

Table 6 – Tourism BC Product Priorities by Market Region

Tourism BC Product Emphasis (2002 – 2005)	Market Region		
	North America	Asia-Pacific	Europe
Built Attractions	√		
Adventure	√	√	√
Cultural Experience	√	√	√
Fishing	√	√	√
Get-Aways	√		
Golf	√	√	√
Guest Ranches	√		
Touring	√	√	√
Spas	√	√	√
Sightseeing	√	√	√
Ski (BC)	√	√	
Ski (Promotion of Thompson Okanagan & BC Rockies)			√
Outdoor Activities	√		
Niche Products	√		
Wildlife Viewing		√	√
Niche Tours (spring blossoms & hot springs)		√	

Source: Adapted by Grant Thornton LLP from *Tourism British Columbia Three-Year Service Plan Highlights 2002/03- 2004/05*

As demonstrated in the following table, all of these products are predominant in the broader Central Okanagan region and several of them are offered within the Study Area specifically

Table 7 – Tourism BC Product Priorities & Their Availability in the Central Okanagan

Tourism BC Product Emphasis (2002 – 2005)	Predominant in Central Okanagan	Predominant in Study Area
Built Attractions	√	
Adventure	√	√
Cultural Experience	√	
Fishing	√	√
Get-Aways	√	√
Golf	√	
Guest Ranches	√	
Touring	√	√
Spas	√	
Sightseeing	√	√
Ski (BC)	√	√
Ski (Promotion of Thompson Okanagan & BC Rockies)	√	√
Outdoor Activities	√	√
Niche Products	√	√
Wildlife Viewing	√	√
Niche Tours (spring blossoms & hot springs)	√	

Regional Tourism Trends and Priorities

This section provides an overview of tourism performance trends in the Central Okanagan. Tourism performance indicators that relate only to the CORD Study Area are not consistently available. Consequently, this section uses indicators showing tourism growth patterns and visitor characteristics for geographic locations or facilities located in or around the Study Area. For example, indicators may be for:

- CORD;
- The broader Okanagan area;
- Communities within CORD (e.g., Kelowna); or,
- Specific facilities such as the Kelowna International Airport.

The *BC Visitors Study – The South Thompson Okanagan Visitor Report*, published in 1998⁹ offers some insight into the characteristics of visitors to that area. Although this region encompasses a much larger area than that of the Central Okanagan Regional District, the Consulting Team feels justified in examining some of the results of the Visitors Study and applying this data to the Study Area. In fact, the data in Table 8 supports this assessment as it reflects a high percentage of visitors to the Kelowna/Central Okanagan sub-region of the South Thompson Okanagan.

⁹ Although this report was published in 1998, the data analysed was collected in the 1995-96 survey period.

Table 8 – Origin of Visitors to the South Thompson-Okanagan

Destinations visited in the Region	SOUTH THOMPSON-OKANAGAN VISITORS		
	Non-Resident Total %	Regional Canada %	BC Resident Total
South Thompson-Okanagan (Net)	100	100	100
Kelowna/Central Okanagan	55	57	5
Vernon/North Okanagan	35	40	24
Penticton Area	29	26	24
South Okanagan	22	20	9
Similkameen	13	11	8
General S. Thompson-Okanagan	3	1	-

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998.

An important factor to note with regard to visitation to this region is seasonality. As the data in the table demonstrates, most people choose to visit the South Thompson-Okanagan region during the summer season. However, the winter season also shows strong numbers, due to the number of winter sport enthusiasts who visit the area's alpine resorts and other winter facilities.

Table 9 – Season of Travel by Visitor Origin

Season of Travel	OVERNIGHT VISITORS							
	Regional		Long Haul		Overseas		BC Resident	
	Can %	US %	Can %	US %	Eur. %	Asia/Pac %	GVRD %	South %
Spring (April and May)	9	10	12	5	5	8	13	14
Summer (June to September)	64	49	64	82	85	56	46	43
Fall (October and November)	8	19	9	4	5	16	15	17
Winter (December to March)	18	21	15	8	5	20	28	25

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998.

When reviewing the reasons for travel to the South Thompson-Okanagan region, 91% of residents and non-residents stated that they were traveling for leisure rather than business purposes. Table 10 below provides a breakdown of this data plus lists the top five reasons that leisure travelers visit this particular region. It is particularly relevant to this study to note that outdoors and wilderness activities were among the top reasons for travel to the South Thompson – Okanagan.

Table 10 – Primary Trip Purpose by Overnight Visitors

Primary Trip Purpose	OVERNIGHT VISITORS							
	Regional		Long Haul		Overseas		BC Resident	
	Can %	US %	Can %	NA %	Eur. %	All %	GVRD %	South %

Leisure Visitors	90	92	82	88	99	95	91	91
Visiting friends and relatives	50	16	51	37	34	31	47	43
Outdoors/wilderness activities	15	41	12	14	13	11	24	18
General sightseeing								
Sports Events	18	22	33	38	43	42	4	5
City/town sightseeing	10	5	2	1	-	1	9	6
	2	13	1	8	8	10	1	1
Business Visitors	10	8	18	12	1	5	9	9

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998

Visitors were also asked to indicate the activities in which they participated during their visit. It is important to note that this data was collected in two different ways for residents and non-residents. Residents were asked to select their activities from a list on a mail-back survey, while non-residents were asked to keep a diary of their activities. The BC resident numbers were so small for all but one category that they were not considered relevant.

Table 11 – Visitor Activities

Activities in the Region	SOUTH THOMPSON-OKANAGAN VISITORS		
	Non-Resident Total %	Regional Canada %	BC Resident Total %
Sightseeing in the city/town	26	19	-
Visiting friends and relatives	16	17	89
Golfing	12	14	-
Zoos/natural displays/gardens	11	10	-
Shopping	11	11	-
Swimming	11	9	-
Wineries/farm tours	11	12	-
Went to beach	11	12	-
Amusement or theme park	10	13	-
Casual walking	10	11	-

Source: BC Visitors Study – The South Thompson Okanagan Visitor Report, 1998

With regard to tourism growth, the indicators show overall that tourism activity in the region is neither growing nor decreasing in any significant way, but generally appears to be holding its own with some limited losses and gains each year. Some key indicators and growth trends are noted below.

- **Custom entries**¹⁰ -- remained fairly **flat** from 1999 – 2002
- **Hotel occupancy** rates in Kelowna – **decreased** from 64% in 1999 to 58% in 2001¹¹; however, most of this decline was due to **increased room supply** in the city. Several new

hotels came on line, or expansions were completed in this time frame, adding significantly to the room capacity for Kelowna. The Grand Okanagan Lakefront Resort and Conference Centre opened a new tower to bring its number of rooms to 320; the Manteo Resort opened its hotel operation in 2000 with 78 hotel suites; and, finally, Best Western built a ten-floor tower in the same year. Although the development of a 358 room Sheraton hotel has fallen through, the Canada Lands Company still has the intention of selling the 3.8-acre property in question near Skyreach Place for the purpose of a hotel development.

- **Hotel room revenue** in Kelowna – **increased** from \$152,096,000 in 1999 to \$170,572,000 in 2001. Revenue would have been affected by the increased room supply discussed in the bullet above.
- **Visitor Information Centre** parties in Kelowna – **decreased** from 363,491 in 1999 to 339,920 in 2001, according to Tourism BC.
- **BC Parks overnight visits** (Okanagan Parks District) – **increased** from 414,218 in 1997 to 459,942 in 2000.
- **BC Parks day visits** (Okanagan Parks District) – **increased** from 3,081,390 in 1997 to 3,180,475 in 2000.
- **BC Parks boat visits** (Okanagan Parks District) – **decreased** from 16,266 in 1997 to 13,325 in 2000.
- **Kelowna International Airport passengers** – **increased** from 741,547 in 1997 to 850,311 in 2001. This increase was primarily due to expanded service from existing airline providers. For example, Horizon Air now offers direct flights to Seattle and Air Canada has added a direct flight to Toronto. Kelowna International Airport is the 11th busiest airport in Canada with regard to passenger volumes and is forecast to reach the 1,000,000 passengers per year level by 2011.
- **Big White skier visits** – **increased** from 510,000 in 1997 to 554,000 in 2000.¹²
- **Silverstar skier visits** – **decreased** from 251,000 in 1997 to 223,000 in 2000.¹³

Traditional and Emerging Products in the Okanagan

The following traditional and emerging products and recreational activities are applicable to the broader Okanagan region. They may not all be applicable to the CORD Crown land Study Area.

¹⁰ Customs entries refers to the number of people entering the Okanagan internationally via the Kelowna International Airport.

¹¹ Tourism BC Research Services, *Tourism Indicators*, June 2002.

¹² *Business in Vancouver Book of Lists*, 1998, 1999, 2000.

¹³ *Business in Vancouver*

However, it is important to consider such products for the broader region to support future product integration and packaging opportunities (e.g., packaging Crown land products with more urban products to take advantage of specific market demand opportunities).

Overall, the Okanagan is experiencing a shift from traditional, family oriented tourism product demand to a higher-yield, more sophisticated product demand represented by some of the “Emerging Products and Recreational Activities” noted below. However, according to representatives of Destination Marketing Organizations in the region, there is a focus on maintaining the traditional markets while working strategically to develop the higher yield, more sophisticated products to meet emerging market demand.

Table 12 – *Emerging & Traditional Products in the Okanagan*

Traditional Products & Recreational Activities	Emerging Products & Recreational Activities
<ul style="list-style-type: none"> • Alpine skiing • Cross country skiing • Snowmobiling • Freshwater fishing • Camping • Lake activities • Hiking • Golfing 	<ul style="list-style-type: none"> • Agri-tourism, particularly wine tourism • Cycle touring • Health & spa tourism • Conventions & meetings • Cultural tourism and First Nations tourism • Cuisine tourism • Museums • Nature Appreciation

Source: Grant Thornton Research

Relevant Regional Strategic Priorities and Initiatives

There are several strategic priorities of organizations or government agencies that are relevant to tourism development, packaging and marketing in the Central Okanagan region. It is important to understand these priorities in relation to potential development, packaging and marketing opportunities for the Study Area. These strategic priorities are described below.

1. Thompson-Okanagan Tourism Association (TOTA)

The mission statement of this organization is “... to increase members’ revenue and sustainability through cooperative marketing, ongoing education, and government liaison to ensure life is good.” As a Regional Destination Marketing Organization (RDMO), the main goal of TOTA is to increase tourism revenue to the area by increasing visitor numbers, increasing length of stay, and increasing per diem spending by visitors. To accomplish this goal, TOTA has formed strategic partnerships with companies such as WestJet, CHBC-TV, and the Thompson Interior Savings Credit Union.

One of the key initiatives that TOTA has undertaken recently is the partnership with the Okanagan Cultural Corridor Project to form the Cultural Tourism Program. This program is in its first year and has inventoried 54 cultural products, events and services in the region. These businesses are listed in TOTA's cultural tourism web page, and are featured in cultural tourism itineraries for travelers. Future initiatives for the Cultural Tourism Program will consist of ongoing inventories in the areas of heritage accommodation and dining experiences and the development of a cultural tourism consortium.

2. Tourism Kelowna

In its *2000-2002 Business and Market Development Plan*, Tourism Kelowna identifies the following five key objectives for tourism growth in the city:

1. Develop tourism products in the areas of sport, culture, agriculture, environmental/adventure.
2. Expand Kelowna's reach into new geographic markets for conventions, group tours and leisure travelers.
3. Build brand awareness for Tourism Kelowna.
4. Develop leading-edge multi-media communication tools.
5. Establish secure long term funding for tourism promotion in Kelowna.

The overall goal of the organization is to "lead the growth and development of the local tourism industry resulting in increased spending and investment."

3. BC Wine Institute – Wineries Tourism

The BC Wine Institute (BCWI) was created by an act of legislation in 1990. Its creation fulfilled one component of the government and wine industry's strategy to develop an internationally competitive wine industry for the province. The BCWI has the mandate to establish the standards for 100% BC wine, to certify compliance with the standards; and to provide support programs, such as market development and research, for the development of the industry. One of the first initiatives undertaken by the BCWI was the adoption of the Vintners' Quality Alliance (VQA) program. This program provides standards, certification and market development support to the industry. Membership fees and levies fund most of the programs of the BCWI who is often called upon to represent the industry's views and issues at the national and international level. The BCWI is interested in the further development of wine tourism in the province, generally, and in the Okanagan, specifically.

4. Key Airlines

As a key discount provider to several communities in BC including Kelowna, WestJet provides a key transportation link to and from the rest of the province and Canada. With the uncertainties around continued Air Canada service to the smaller communities in the province, it is positive

that WestJet continues to expand its fleet, its routes and the frequency of flights to provide even more extensive service to both business and leisure travelers. Air Canada has recently restructured and continues to provide service to Kelowna through its subsidiary airlines Tango (discount airline) and Jazz (the regional carrier).

5. Okanagan Cultural Tourism Corridor Project

The Okanagan Cultural Corridor (also discussed under “TOTA” above) is a cultural tourism development project, supported by Tourism British Columbia. The Okanagan Cultural Corridor will provide visitors with the opportunity to purchase the multi-faceted experience of the arts, heritage, and agri-tourism attractions of the Okanagan Valley. The principal objective of the Okanagan Cultural Corridor Project is to diversify the Valley's tourism product, grow its long-haul markets, and increase visitor volume and revenues. At the same time, by increasing earned revenues for the Valley's cultural organizations, the Project is intended to enhance the economic well-being of the Valley's cultural community. Finally, the economic impacts generated by cultural tourism are intended to provide rationale for increased public and private sector investments in the Valley's cultural resources.

6. Rails to Trails Initiative

The Ministry of Sustainable Resource Management (MSRM) and Tourism BC are jointly spearheading the Rails to Trails Initiative in British Columbia. These two entities are exploring the economic development opportunities that may exist in the creation of this potentially world-class tourism product. It is hoped that the development of this product will not only encourage the growth of a new market for soft adventure tourism, but also help to enhance and preserve the cultural heritage of the province.

The Okanagan already features portions of one of most attractive converted railway corridors -- the Kettle Valley Railway (KVR) -- and, as a result, will undoubtedly play an integral role in the provincial Rails to Trails Initiative. In the June 2002, *Provincial Rails to Trails Feasibility Study Phase One Report*, commissioned by Tourism BC and the Ministry of Sustainable Resource Management, and prepared by Pinnacle Consulting, the section of the KVR within the Study Area was ranked third in terms of its adaptability from a railway corridor to a world class recreational trail. The criteria used to determine this ranking were as follows:

- Ownership
- Contiguous Right-of-Way
- Short term Destination Tourism Appeal
- Potential for Linking Communities
- Presence of Physical Gaps
- Potential for Economic Development
- Presence of Active Management
- Conflicts

Through its exploration of this and other existing Rails to Trails products, Tourism BC and MSRM hope to determine the feasibility of eventually marketing a provincial Rails to Trails product under one ownership, or governance, that would take responsibility for continued development and maintenance of these trails.

7. Cuisine Tourism Initiative

The Canadian Tourism Commission (CTC) has recently developed a *Cuisine Tourism Product Development Strategy*. Background research conducted for this strategy shows that demand for cuisine tourism is on the rise as tourists look for more educational, cultural and exciting experiences when traveling. The CTC has identified four overall objectives in this product development strategy:

- Determine how cuisine can play a stronger role in strengthening Canada's position as a tourist destination;
- Explore product development opportunities for cuisine;
- Document the people and organizations actively building and promoting cuisine; and,
- Promote cuisine-related marketing initiatives in all CTC markets.

The Central Okanagan is well situated to take advantage of this new national initiative. This could have future relevance to product integration between the Study Area and the front and mid-country products in the broader region. The CTC has identified many cuisine tourism products that exist or are emerging in the Central Okanagan, including:

- Agri-tourism;
- Cooking schools;
- Dinner and theatre packages;
- Dining in fine restaurants/inns;
- Farm vacations;
- Food festivals;
- Fruit picking;
- Tasting/buying packaged local products/farmer's markets;
- Tour a food/wine/beer route;
- Visit a cheese factory; and,
- Winery tour and tasting.

The strategy outlined by the CTC presents opportunities for regions such as the Central Okanagan, which could further develop their cuisine tourism product in conjunction with its emerging wine tourism sector. These products can, in turn, be packaged with existing and potential products in the Study Area.

Conclusions and Implications for this Study

The information presented in this section focuses on global, provincial and regional tourism trends and strategic priorities, in addition to North American outdoor recreation trends. Key conclusions drawn from this section that are particularly important to the identification of tourism product priorities and development concepts for the Study Area are summarized below, under the broader headings of "Priority Tourism Trends" and "Priority Outdoor Recreation Trends".

Appendix H Strengths, Weaknesses, Opportunities and Threats Analysis (SWOT)

A SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment is an important part of any strategy, marketing or business plan development process. In the case of this Study, the role of the SWOT assessment is to help identify potential tourism and outdoor recreation development opportunities by identifying the region's strengths and weaknesses and by looking at opportunities and threats that may affect the region.

This section summarizes the results of the SWOT assessment conducted by the Consulting Team for the Central Okanagan area¹⁴. Background information for the SWOT assessment included:

- Tourism operator and recreational club survey results;
- Broader stakeholder (e.g., government agencies, tourism organizations, economic development organizations, First Nations) survey results;
- A review of existing literature, plans and maps;
- Market research;
- A review of the biophysical features of the Study Area; and,
- The Tourism Resource Inventory (2002) Existing Use and Facilities databases and map.

The SWOT assessment was applied to the Study Area (which includes all the Crown land in the Central Okanagan Regional District), in addition to the broader tourism destination of the Central Okanagan. The Consulting Team included the broader area in this assessment because tourism development and activity in the Study Area does and will take place within the larger area. As such, there will likely be varying degrees of interaction between product offerings in the Study Area and in the region as a whole that will influence the type and scale of tourism development in the Study Area.

For the purposes of this assessment, the following definitions apply:

Strengths: Factors that are positive in terms of existing and potential tourism performance in the destination.

Weaknesses: Factors that negatively affect how the tourism destination does and can perform. Weaknesses are usually internal in nature and can often be addressed through specific interventions.

Opportunities: Factors that present opportunities for enhanced tourism growth for the destination.

Threats: Factors, usually (but not always) external in nature, which present threats to tourism growth and performance in the destination. Typically, threats cannot be easily addressed due to the fact that they are external in origin.

Under each of the above headings, factors in this assessment are grouped under the following sub-headings:

¹⁴ The "Central Okanagan" includes the Central Okanagan Regional District.

- Awareness, Markets and Marketing
- Destination Features and Management
- Destination Location and Access
- Products and Facilities
- Infrastructure
- Services
- Institutional and Organizational
- Socio-economic

Note that some of the factors can be applied to two of the above categories and are, therefore, recorded under two categories (e.g., Under “STRENGTHS”, “clean and green” is recorded under both “Awareness, Markets and Marketing” and “Destinations Features and Management”.

Subsequent to this geographically-based assessment, the Consulting Team conducted an assessment for each tourism facility or product type determined to be a priority for tourism development in the Study Area. This product assessment is documented later in the *Crown Land Tourism and Recreation Development Opportunities* section of the report.

Study Area SWOT Summary

Strengths

Awareness, Markets and Marketing

- Get-away market appeal
- “Okanagan” name recognition – long-standing awareness amongst certain markets about the Okanagan as a family-oriented destination
- “Peaches and beaches” – long-standing recognition of the Okanagan as a summer destination
- Recognition as an alpine ski destination
- Growing recognition as a golf destination
- Growing recognition as a wineries destination
- Gradual emergence of market diversity
- Gradual emergence of higher yield products and markets (relates to emergence of market diversity)
- Perception as a relatively “safe” destination
- Perception as a relatively “clean and green” destination

Destination Features and Management

- Relatively “clean and green” destination
- Good recreational lakes, particularly in valley bottom
- Unique dry interior grasslands
- Four-seasons destination, with relatively mild climate
- Cultural and heritage values

- Agricultural heritage (orchards and vineyards)
- High number of red and blue listed species (rare and endangered)
- High percentage of protected areas
- Significant Big Horn Sheep populations
- Recent completion and expected implementation of the Land and Resource Management Plan

Destination Location and Access

- Central location within BC
- Proximity to Kelowna, Greater Vancouver, Alberta, Washington, Idaho
- Good highway access to and from destination (particularly important since 9/11 because of the appeal of “rubber tire” travel)
- Ease of access to the backcountry via numerous roads
- Good secondary road access within Study Area
- Relatively safe destination

Products and Facilities

- Kettle Valley Railway (KVR) -- Note: the “Phase One Report on the Provincial Rails to Trails Study” (June 30, 2002) ranks the Beaverdell to Chute Lake (Carmi subdivision) corridor as #3 in the province (out of 15 corridors)
- Wine industry and related tourism products and festivals
- Variety of activities
- Strong golf and ski product
- Increasing diversity in accommodation types
- Increasing diversity in food and beverage offerings
- Evolving “Cultural District” (Kelowna) and supporting programs (“Okanagan Cultural Corridor”)

Infrastructure

- International airport
- Well-planned infrastructure
- Good educational facilities

Services

- Convenient, cost-effective flights
- Good representation of banks (Kelowna) resulting in relatively good access to capital
- Relatively good access to labour (labour supply)

Institutional and Organizational

- Programs and activities of Tourism Kelowna
- Programs and activities of Thompson-Okanagan Tourism Association
- Programs and activities of Tourism BC and their relationship to the above destination marketing organizations (DMOs)
- Improved coordination between many organizations, agencies and interests due to the recent completion and expected implementation of the Land and Resource Management Plan

- Strategic and coordinated economic development initiatives emerging from the *Green Economic Development Strategy* (in progress)

Socio-Economic

- Relatively prosperous area
- Relatively strong economic growth
- Relatively strong population growth

Weaknesses

Awareness, Markets and Marketing

- More coordinated packaging is required
- Current difficulty in attracting “higher yield” markets in significant numbers
- Awareness about backcountry facilities and activities is low amongst many in the front country service sector (e.g., hotel concierges and other front line service staff) (also noted under “Services” below)

Destination Features and Management

- Absence of internationally-significant natural features
- The Kelowna “strip” with fast-food restaurants, malls, etc. does not fit with certain tourism markets
- Freshwater fishing hampered by insufficient size of fish
- Existing and potential incompatibility between tourism use and water management objectives
- Cut backs in resources for managing MoF recreation sites and BC Parks

Destination Location and Access

- Poor coordination for backcountry access
- Uncertainty regarding MoF policy relating to Forest Service road decommissioning
- Uncertainty regarding MoF plans to devolve or abandon recreation sites and trails
- Road access and information regarding decommissioning and maintenance of roads is becoming an issue

Products and Facilities

- Lack of secure, longer-term land tenure to support investment in new and existing product
- Current uncertainty related to Crown land disposition policies
- Limited number of lodges
- Some lodges require upgrading to both increase and diversify markets
- Lack of sophistication in some product operations
- Lack of adequate capital investment for modern amenities

Infrastructure

- Traffic bottlenecks on Kelowna bridge
- Back-country facilities and lodges lack many modern services such as telephone, running water, restaurant facilities

Services

- Awareness about backcountry facilities and activities is low amongst many in the front country service sector (e.g., hotel concierges and other front line service staff) (also noted under “Awareness, Markets and Marketing” above)

Institutional and Organizational

- Complicated government (local, regional, provincial) jurisdictional web – can impede both new tourism development and enhancement of existing product

Opportunities

Awareness, Markets and Marketing

- Market development opportunities include:
 - Increasing length of stay
 - Attracting new markets
 - Increasing yield per visitor
 - Building on pre- and post-meeting visitation
 - Maintaining and possibly enhancing (by diversifying suitable product offering) the family market
- Opportunities to better package existing product
- Opportunities to improve coordination of marketing

Destination Features and Management

- Opportunities to improve management of various land and resource uses to increase compatibility and coordination of such uses (e.g., Irrigation District objectives and tourism and recreation objectives)
- Recent completion and expected implementation of the Land and Resource Management Plan may present opportunities to better manage the Study Area for traditionally competing values

Destination Location and Access

- Opportunities to improve the traffic flow in and out of Kelowna through bridge enhancements
- Opportunities to improve safe access to various highly utilized sites such as the Myra Canyon

Products and Facilities

- Opportunities to build product, packages and markets related to:
 - The KVR
 - Wineries tourism
 - Crystal Mountain
 - Family tourism
- Related opportunities to diversify and enhance region’s facilities:
 - Enhancement of existing lodges
 - Niche-lodge development

- Crystal Mountain development
- Family camping and fishing on upper lakes
- Related opportunities to diversify and enhance region's product:
 - High-end cycling
 - Spa and health tourism
 - Wineries and cuisine tourism
 - Festivals
 - Elder hostel
 - Bus touring
 - Cultural tourism – First Nations
 - Cultural tourism – non-First Nations
 - Winter Product (cross-country skiing, snowmobiling)
 - Camping

Infrastructure

- Opportunity to provide for infrastructure improvements resulting from increased usage, better management and further development (e.g. proposed infrastructure improvements resulting from Crystal Mountain development)

Services

- Opportunity to increase capacity of existing operators through targeted training courses aimed at:
 - Improving business planning skills
 - Delivering product and services to better meet existing and emerging market demand through targeted training courses
 - Product packaging
 - E-commerce
 - Marketing

Institutional and Organizational

- Opportunities to improve the ability of existing and potential tourism business to expand and/or enhance and/or develop their product and offerings by better reducing and/or coordinating the “red tape” of various regulatory agencies
- Preparation of the “Green Sustainable Economic Development Strategy” for the Okanagan and Similkameen Valleys (in progress) will likely present opportunities to increase coordination amongst various organizations and agencies that affect tourism development
- Recent completion and expected implementation of the Land and Resource Management Plan will likely present opportunities to increase coordination amongst various organizations and agencies that affect tourism development
- Rails to Trails Initiative presents product enhancement, development, coordination and marketing opportunities
- BC Wine Institute Initiatives may present opportunities to better coordinate the development and marketing of wineries tourism

Socio-Economic

- Opportunities to increase revenues and social benefits to the region through strategic recreational and tourism development
- Preparation of the “Green Sustainable Economic Development Strategy” for the Okanagan and Similkameen Valleys (in progress) may present opportunities for sustainable tourism development

Threats

Awareness, Markets and Marketing

- Competition from other destinations within BC and in nearby US
- Certain competing destinations have better access to larger markets (e.g., destinations and related products in California have ready access to the huge California market)

Destination Features and Management

- Land Tenure:
 - Uncertainty regarding Crown land disposition policy and related length of tenure
 - Uncertainty regarding pricing for tenure
 - Uncertainty relating to First Nations land claims
- Existing and potential conflict over land and resources:
 - LRMP priorities
 - Irrigation District priorities
 - First Nations
 - Conflicts between different types of tourism and recreation (e.g., motorized versus non-motorized, etc.)
 - Conflicts between consumptive and non-consumptive use of land and resources
 - Conflicts relating to maintaining the quality of viewscapes
- General environmental degradation
- Carrying capacity issues:
 - Potential overuse of the KVR
 - Potential overuse of sensitive areas
 - Potential threat to water supply
- Wild fires and pests (during the summer season)

Destination Location and Access

- Decommissioning or lack of maintenance of forest service roads

Products and Facilities

- Competition from destinations that offer greater diversity and quality in back-country lodges
- Increased fees and taxes without providing certainty in tenure/access thereby making marginal operations not viable

Services

- Increased fees is resulting in some operators leaving business and general decrease in service (forest campsites and BC Parks)
- Decrease in government services and facilities at Ministry of Forest recreational sites, camp sites and BC Parks will likely affect the quality of service provided to visitors

Institutional and Organizational

- Lack of coordination in policy development
- Potential implications of new BC Community Charter (e.g., potential resort tax and other taxes that could increase the cost of doing business and increase costs to consumers)

Socio-Economic

- Global, national and provincial economic conditions
- Impacts of September 11, 2001, terrorist attacks

Conclusions

This section presented the results of a comprehensive SWOT assessment for the Study Area and surrounding region. This summary provided key information that supported the priority issues analysis, product priorities analysis and the recommendations presented in subsequent sections of the report.

Appendix I Description of Conceptual Options for Locating 1-2 Niche Lodges

The Consulting Team has identified four conceptual options (general areas) for locating the one to two niche lodges proposed in the Recommendations section. The locations are conceptual and strategic in their selection, intended to indicate general areas rather than specific sites. Their inclusion here is not intended to illustrate all the opportunities for locating these lodges, nor does it infer that all the locations described warrant development.

The Consulting Team used the following criteria when selecting the conceptual locations:

- Proximity to existing or potential tourism product or activity areas and amenities;
- Proximity to interesting and/or attractive natural and/or cultural features;
- Attractive setting; and,
- Good access.

Prior to development, proponents would need to conduct their own due diligence and site assessments. In particular, they would need to carefully evaluate site feasibility and environmental factors, which have not been considered at this stage.

Proposed options for locating these lodges and the associated benefits of each location are described below and are depicted in the *Potential Tourism Development Locations* map presented in Appendix B. Potential markets and product-facility linkages are presented in Appendix C.

Niche Lodge -- Conceptual Location A

Planning Zone 2 – Myra-Mission

Near the Kettle Valley Railway

This area offers the benefits of being close to Kelowna and the Kettle Valley Railway Trail and of having good road access. This location is undeveloped and provides the opportunity for upper-end developments catering to a soft adventure market, which could tie in with further development and promotion of the Kettle Valley Railway cycling experience. A key attribute of this location is proximity to First Nations land, which could encourage development focusing on native history and culture. It could also become a First Nations business opportunity providing training and employment opportunities.

Niche Lodge -- Conceptual Location B

Planning Zone 2 – Myra-Mission

Near the Kettle Valley Railway

This area is specifically focused on the Kettle Valley Railway Trail. Its location is at the Bellevue Creek trestle, which is a spectacular curve steel trestle. The Bellevue Creek site is road accessible and can be easily reached from Kelowna. It is within about one hour's cycle ride of Myra Canyon allowing an easy and level day trip. It is also on the Crawford Trail, which provides hiking opportunities. Note that any potential sites in this area should exclude locations within the Myra-Bellevue Provincial Park boundaries and that potential

sites on the perimeter of the Park should involve consultation with BC Parks regarding compatibility with the Park's management objectives.

Niche Lodge -- Conceptual Location C

Planning Zone 5 – Lambly-Trepanier

Near Crystal Mountain

The Crystal Mountain Resort development, as proposed, could become the largest tourism development in the CORD. The base area of the Crystal Mountain redevelopment is proposed to include a mix of tourism commercial operations. A niche lodge or lodges could form a significant component of this development. This lodge could have a spa component and could form part of the bed-base of the resort's development. A key benefit of this location is proximity to both winter and summer activity areas.

Niche Lodge -- Conceptual Location D

Planning Zone 6 – Terrace Mountain

Near Shorts Creek

This area is south of the mouth of Shorts Creek and south of Fintry Park. It is lakefront Crown land, and road-accessible from Kelowna and Vernon. Its proximity to the old Brigade Trail and Shorts Creek provide good opportunities for fishing, hiking and wildlife viewing (California Bighorn Sheep).

Appendix J Potential Markets and Product / Activity Linkages for Resorts and Lodges

Potential Markets for Resorts and Lodges

<i>Potential Market</i>	<i>Resort/Lodge Categories</i>		
	<i>Existing Lodges</i>	<i>Niche Lodge</i>	<i>Crystal Mtn. Res.</i>
CORD Residents	★	◆	★
Other Okanagan	★	◆	◆
Lower Mainland	◆	★	★
Alberta	◆	◆	◆
Regional US		◆	◆
Other			
Key*	★ Prime Market	◆ Secondary Market	

* "Prime Market" = The key or main market segment
 "Secondary Market" = An important, but secondary, market segment

Potential Activity and Product Linkages for Lodges and Resorts

<i>Activity/Product Linkages</i>	<i>Resort/Lodge Categories</i>		
	<i>Existing Lodges</i>	<i>Niche Lodge</i>	<i>Crystal Mtn. Res.</i>
Within the CORD Study Area			
Freshwater fishing	★		
Wildlife viewing & nature appreciation	★	◆	★
Hiking	★	◆	★
Cycle touring & mountain biking	◆	★	◆
Ski touring	◆		★
Snowmobiling	★		◆
Snowshoeing/Dog Sledding	◆		◆
Within the Okanagan			
Agri-tourism – wineries & related festivals		★	★
Cuisine tourism		★	★
Pre /post conferences/spousal tours		◆	★
Health / spa tourism		★	◆
Cultural tourism		★	◆
Golf		◆	★
Key*	★ Major Activity Linkage	◆ Minor Activity Linkage	

* "Major Activity Linkages" = Activities or products that significantly complement the priority product and, together, respond well to market demand
 "Minor Activity Linkages" = Activities or products that complement the priority product and, together, respond to market demand

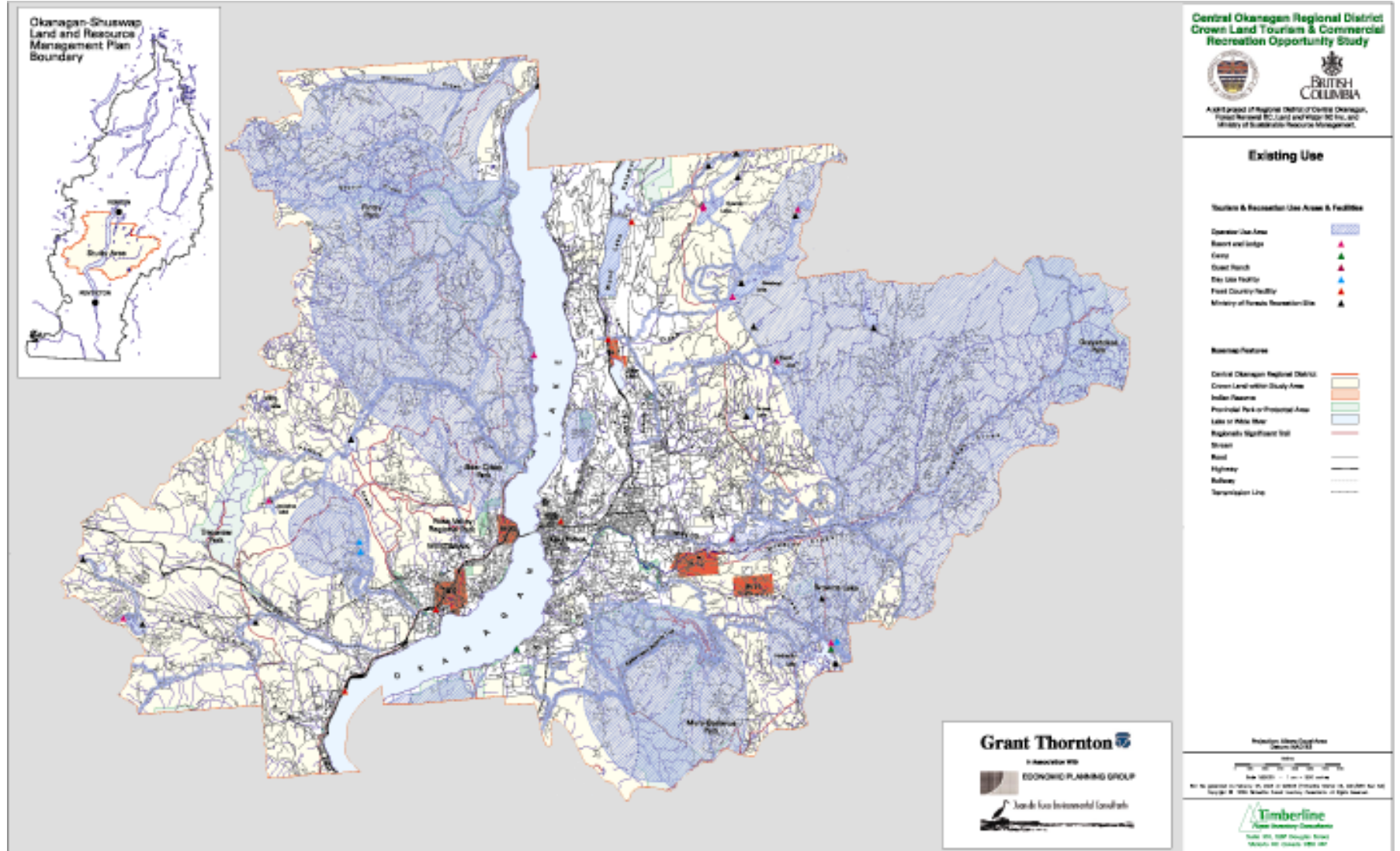
Appendix K Maps

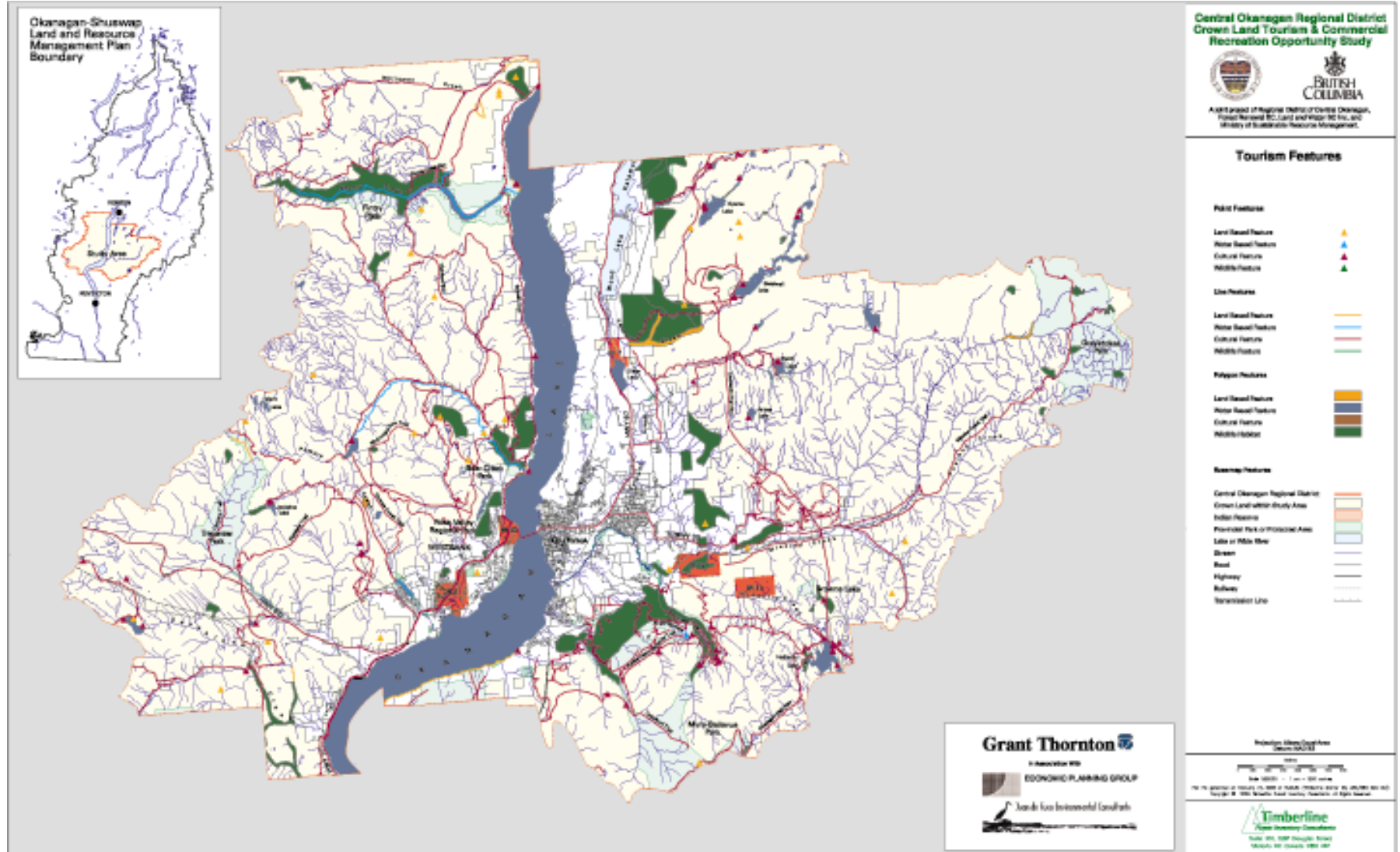
Existing Use

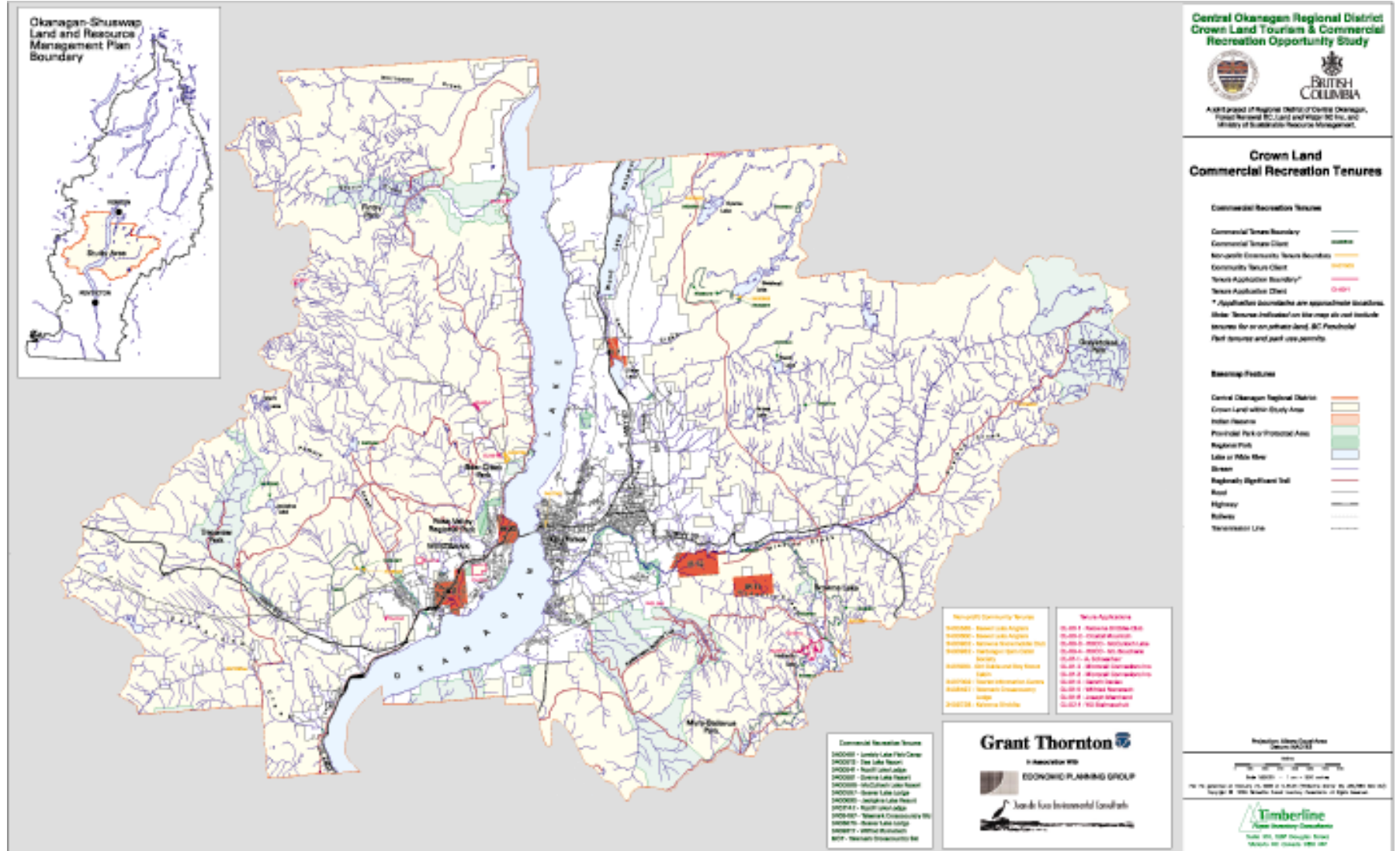
Tourism Features

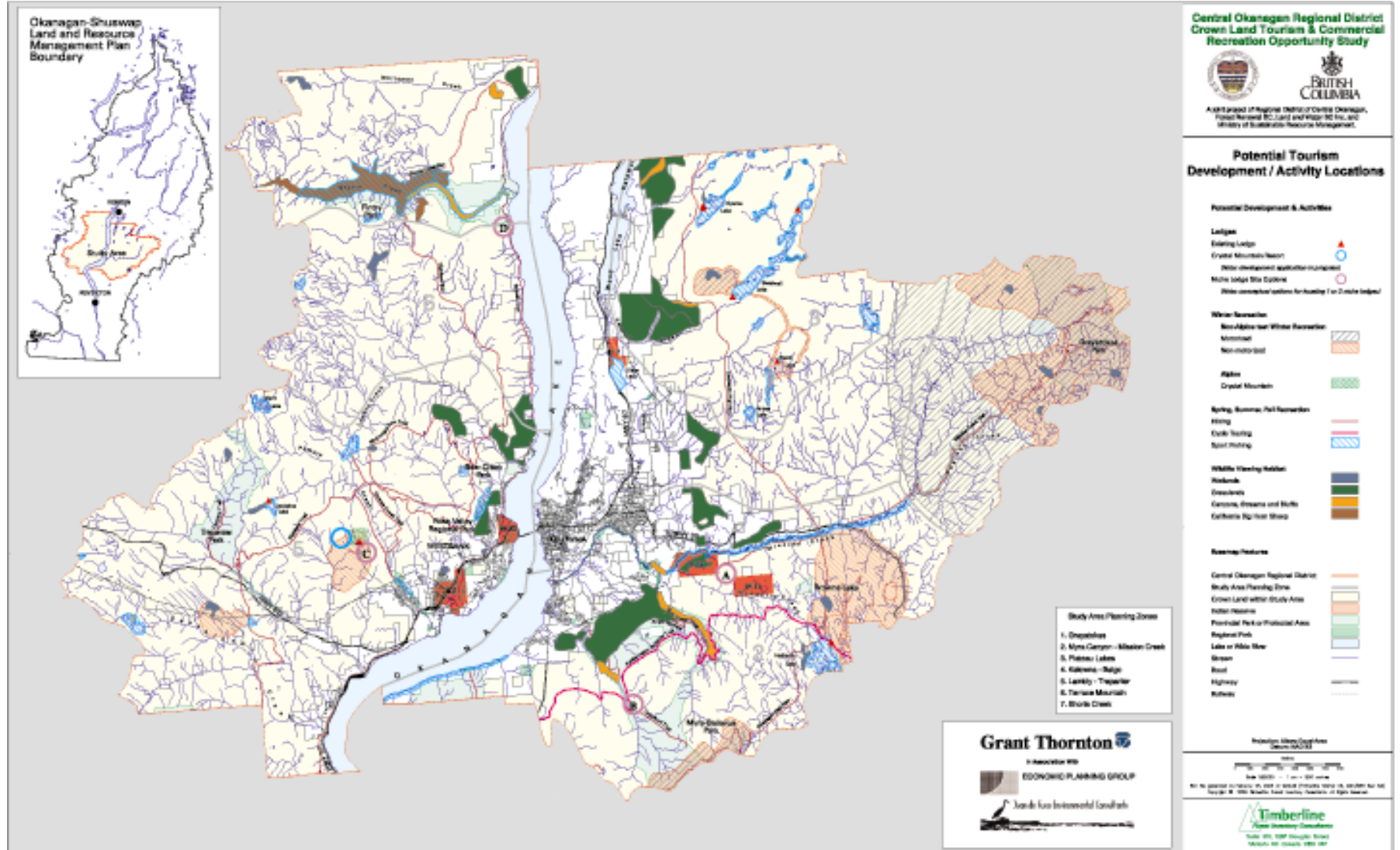
Crown Land Commercial Recreation Tenures

Potential Tourism Development/Activity Locations









The metadata coverage and plot information associated with the above maps is provided on the following pages.

CORD Inventory Metadata

cord_tos_project_meta.txt / cord_tos_project.meta

PROJ_NAME Central Okanagan Regional District TOS
 GEOG_LOC Central Okanagan Regional District
 ORG_NAME Ministry of Sustainable Resource Management
 ORG_NAME Grant Thornton LLP
 MAPPER Jennifer Nichol (Project Manager)
 SIL
 YEAR_SURV 2002
 DATE_REC 02-28-2003
 RECOR_NAME Leah Smith (Timberline)

cord_tourop_aux1_meta.doc

Purpose: Metadata to describe Tourism Operator Auxiliary Table 1
 (cord_tourop_aux1.inf)

Description: cord_tourop_aux1.inf contains information regarding tourism operators that was collected but does not fit into the standard database (cord_tourop.inf)

Use: Data from this table can be linked to tfc_cord.pat and ttua_cord.patusearea using the TOURCODE item

cord_tourop_aux1.inf Attributes:

ITEM #	ITEM NAME	DESCRIPTION
1	TOURCODE	Unique identifier assigned by Grant Thornton LLP
2	NAME	Name of the business or organization
3	CAPACITY	Capacity
4	BUSINESS_TYPE	Business or organization type
5	LANDSTATUS	Land status
6	YRS_OPER	Number of years of operation
7	KEY_FEATURES	Key geographic features
8	ACCESS	Access to facilities and operating areas
9	PCT_REGION	Percentage of regional (Okanagan) visitors
10	PCT_CORD	Approximate percentage of business that is within CORD

tfc_cord_meta.txt / tfc_cord.meta

PROJECT	Central Okanagan Regional District Crown Land Tourism and Recreation Opportunity Study
GEOGRAPHIC AREA	Central Okanagan Regional District Crown Lands
AGENCY	Ministry of Sustainable Resource Management
AGENCY CONTACT	Nelson Grant 250.558.1793
DATA COLLECTION	Grant Thornton 604.521.3761 - Jennifer Nichol, Todd Sanderson
DIGITAL MAPPING	Timberline 250.480.1101 - Leah Smith
COVERAGE TITLE	tfc_cord
DESCRIPTION	Tourism facilities
ACCURACY	Matched to TRIM, generally 1:20,000
STANDARDS	Digital Data Standards for a Community Based Tourism Opportunity Study Version 1.0 (March 2000)
PROJECTION	Albers Equal Area Conic, NAD 83
PRODUCTION	February 2003
DATABASE	See report Central Okanagan Crown Land Tourism and Commercial Recreation Study

tfta_cord_meta.txt / tfta_cord.meta

PROJECT	Central Okanagan Regional District Crown Land Tourism and Recreation Opportunity Study
GEOGRAPHIC AREA	Central Okanagan Regional District Crown Lands
AGENCY	Ministry of Sustainable Resource Management
AGENCY CONTACT	Nelson Grant 250.558.1793
DATA COLLECTION	Grant Thornton 604.521.3761 - Jennifer Nichol, Todd Sanderson
DIGITAL MAPPING	Timberline 250.480.1101 - Leah Smith
COVERAGE TITLE	tfta_cord
DESCRIPTION	Tourism polygon feature
ACCURACY	Various source data, generally 1:50,000
STANDARDS	Digital Data Standards for a Community Based Tourism Opportunity Study Version 1.0 (March 2000)
PROJECTION	Albers Equal Area Conic, NAD 83
PRODUCTION	February 2003
DATABASE	See report Central Okanagan Crown Land Tourism and Commercial Recreation Study

tftl_cord_meta.txt / tftl_cord.meta

PROJECT	Central Okanagan Regional District Crown Land Tourism and Recreation Opportunity Study
GEOGRAPHIC AREA	Central Okanagan Regional District Crown Lands
AGENCY	Ministry of Sustainable Resource Management
AGENCY CONTACT	Nelson Grant 250.558.1793

DATA COLLECTION Grant Thornton 604.521.3761 - Jennifer Nichol, Todd Sanderson
DIGITAL MAPPING Timberline 250.480.1101 - Leah Smith
COVERAGE TITLE tftl_cord
DESCRIPTION Tourism line features
ACCURACY Various source data, generally 1:50,000
STANDARDS Digital Data Standards for a Community Based Tourism Opportunity
Study Version 1.0 (March 2000)
PROJECTION Albers Equal Area Conic, NAD 83
PRODUCTION February 2003
DATABASE See report Central Okanagan Crown Land Tourism and Commercial
Recreation Study

tftl_cord_meta.txt / tftl_cord.meta

PROJECT Central Okanagan Regional District Crown Land Tourism and
Recreation Opportunity Study
GEOGRAPHIC AREA Central Okanagan Regional District Crown Lands
AGENCY Ministry of Sustainable Resource Management
AGENCY CONTACT Nelson Grant 250.558.1793
DATA COLLECTION Grant Thornton 604.521.3761 - Jennifer Nichol, Todd Sanderson
DIGITAL MAPPING Timberline 250.480.1101 - Leah Smith
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DESCRIPTION Tourism point feature
ACCURACY Various source data, generally 1:50,000
STANDARDS Digital Data Standards for a Community Based Tourism Opportunity
Study Version 1.0 (March 2000)
PROJECTION Albers Equal Area Conic, NAD 83
PRODUCTION February 2003
DATABASE See report Central Okanagan Crown Land Tourism and Commercial
Recreation Study

tuar_cord_meta.txt / tuar_cord.meta

PROJECT Central Okanagan Regional District Crown Land Tourism and
Recreation Opportunity Study
GEOGRAPHIC AREA Central Okanagan Regional District Crown Lands
AGENCY Ministry of Sustainable Resource Management
AGENCY CONTACT Nelson Grant 250.558.1793
DATA COLLECTION Grant Thornton 604.521.3761 - Jennifer Nichol, Todd Sanderson
DIGITAL MAPPING Timberline 250.480.1101 - Leah Smith
COVERAGE TITLE tuar_cord
DESCRIPTION Tourism use areas
ACCURACY Matched to TRIM, generally 1:20,000
STANDARDS Digital Data Standards for a Community Based Tourism Opportunity
Study Version 1.0 (March 2000)

Coverage: reg_parks
Description: Regional parks
Source: Central Okanagan Regional District
Date: Data received August 2, 2002
Note:

Coverage: t_parks
Description: Provincial parks
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: park.shp converted to coverage

Coverage: t_pas
Description: Provincial parks and protected areas
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: pas_aug3.shp converted to coverage

Coverage: rec_trails
Description: Regionally significant recreation trails
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note:

Coverage: t_non_crwn
Description: Private Land, Crown Land, Indian Reserves
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: non_crwn.shp converted to coverage

Coverage: ir_new
Description: Indian Reserves 11 and 12
Source: Central Okanagan Regional District
Date: Data received June 26, 2002
Note: ir11bound.e00 and ir12bound.e00 were appended and corrected datum

Coverage: roads
Description: Highways
Source: Provided by MSRM
Date: Data received August 21, 2002
Note: road1.shp converted to coverage

Development Opportunities Map

FILE: dev_oppor_map_meta.txt
PURPOSE: To provide information regarding dev_oppor.hp2 (Potential Tourism Development / Activity Locations)
DESCRIPTION: Potential Development Locations in the Central Okanagan Regional District
AUTHOR: Timberline Forest Inventory Consultants Ltd.
in association with Grant Thornton LLP
Suite 310, 1207 Douglas Street, Victoria, BC V8W 2E7
Phone: (250) 480-1101
File Reference: 4022012
DATE: February, 2003

DATA SOURCES:

Coverage: dev_sites
Description: Potential development/activity sites
Source: Points digitized by Timberline
Date: September, 2002
Note:

Coverage: dev_routes
Description: Potential development/activity routes (lines)
Source: Lines digitized by Timberline
Date: September, 2002
Note:

Coverage: tuar_cord
Description: Tourism use areas
Source: New polygons digitized by Timberline based on interviews by Grant Thornton;
Appended specific polygons from 1994 TRI (use_re~1.e00)
Date: Current as of February, 2003
Note:

Coverage: tfc_cord
Description: Tourism facilities
Source: Points digitized by Timberline based on interviews by Grant Thornton
Date: Current as of February, 2003
Note:

Coverage: rfi_cord
Description: Recreation Features Inventory
Source: Digitized by Timberline
Date: August, 2002
Note:

Coverage: zones
Description: Planning Zones

Source: Digitized by Timberline
Date: August, 2002
Note:

Coverage: TRIM (lakes, rivers, roads, annotation)
Description: Basedata
Source: Provided by MSRSM
Date: Data received March 19, 2002
Note:

Coverage: reg_parks
Description: Regional parks
Source: Provided by CORD
Date: Data received August 2, 2002
Note:

Coverage: t_parks
Description: Provincial parks
Source: Provided by MSRSM
Date: Data received March 19, 2002
Note: park.shp converted to coverage

Coverage: t_pas
Description: Provincial parks and protected areas
Source: Provided by MSRSM
Date: Data received March 19, 2002
Note: pas_aug3.shp converted to coverage

Coverage: rec_trails
Description: Regionally significant recreation trails
Source: Provided by MSRSM
Date: Data received March 19, 2002
Note:

Coverage: t_non_crwn
Description: Private Land, Crown Land, Indian Reserves
Source: Provided by MSRSM
Date: Data received March 19, 2002
Note: non_crwn.shp converted to coverage

Coverage: ir_new
Description: Indian Reserves 11 and 12
Source: CORD
Date: Data received June 26, 2002
Note: ir11bound.e00 and ir12bound.e00 were appended and corrected datum

Coverage: roads
Description: Highways
Source: Provided by MSRSM
Date: Data received August 21, 2002
Note: road1.shp converted to coverage

TRI Features Map

FILE: tri_features_map_meta.txt
PURPOSE: To provide information regarding tri_features.hp2 (Tourism Features)
DESCRIPTION: Tourism features in the Central Okanagan Regional District
AUTHOR: Timberline Forest Inventory Consultants Ltd.
in association with Grant Thornton LLP
Suite 310, 1207 Douglas Street, Victoria, BC V8W 2E7
Phone: (250) 480-1101
File Reference: 4022012
DATE: February, 2003

DATA SOURCES:

Coverage: tfta_cord
Description: Tourism feature polygons
Source: Polygons digitized by Timberline; TRIM features extracted from TRIM
Date: Current as of February, 2003
Note:

Coverage: tftp_cord
Description: Tourism feature points
Source: Points digitized by Timberline; MOF recreation sites copied from trecpts_ok.e00
Date: Current as of February, 2003
Note:

Coverage: tftl_cord
Description: Tourism feature lines
Source: Lines digitized by Timberline; TRIM features extracted from TRIM; Trails copied from rec_trls.shp (supplied by MSRM), Highways copied from roads1.shp (supplied by MSRM)
Date: Current as of February, 2003
Note:

Coverage: TRIM (lakes, rivers, roads, annotation)
Description: Basedata
Source: Provided by MSRM
Date: Data received March 19, 2002
Note:

Coverage: reg_parks
Description: Regional parks
Source: Provided by CORD
Date: Data received August 2, 2002
Note:

Coverage: t_parks
Description: Provincial parks
Source: Provided by MSR
Date: Data received March 19, 2002
Note: park.shp converted to coverage

Coverage: t_pas
Description: Provincial parks and protected areas
Source: Provided by MSR
Date: Data received March 19, 2002
Note: pas_aug3.shp converted to coverage

Coverage: rec_trails
Description: Regionally significant recreation trails
Source: Provided by MSR
Date: Data received March 19, 2002
Note:

Coverage: t_non_crwn
Description: Private Land, Crown Land, Indian Reserves
Source: Provided by MSR
Date: Data received March 19, 2002
Note: non_crwn.shp converted to coverage

Coverage: ir_new
Description: Indian Reserves 11 and 12
Source: CORD
Date: Data received June 26, 2002
Note: ir11bound.e00 and ir12bound.e00 were appended and corrected datum

Coverage: roads
Description: Highways
Source: Provided by MSR
Date: Data received August 21, 2002
Note: road1.shp converted to coverage

TRI Use Map

FILE: tri2002_map_meta.txt
PURPOSE: To provide information regarding tri2002.hp2 (Tourism Use)
DESCRIPTION: Tourism use areas and facilities in the Central Okanagan
Regional District
AUTHOR: Timberline Forest Inventory Consultants Ltd.
in association with Grant Thornton LLP
Suite 310, 1207 Douglas Street, Victoria, BC V8W 2E7
Phone: (250) 480-1101
File Reference: 4022012
DATE: February, 2003

DATA SOURCES:

Coverage: tuar_cord
Description: Tourism use areas
Source: New polygons digitized by Timberline based on interviews by Grant Thornton;
Appended specific polygons from 1994 TRI (use_re~1.e00)
Date: Current as of February, 2003
Note:

Coverage: tfc_cord
Description: Tourism facilities
Source: Points digitized by Timberline based on interviews by Grant Thornton
Date: Current as of February, 2003
Note:

Coverage: mofrec_cord
Description: MoF Recreation Sites
Source: Ministry of Sustainable Resource Management FTP site
Date: Data downloaded from FTP August, 2002
Note: Imported from trecpts_ok.e00

Coverage: fac94_cord
Description: Front country facilities
Source: Provided by Ministry of Sustainable Resources Management
Date: Data received March 19, 2002
Note: Import from facility.e00

Coverage: TRIM (lakes, rivers, roads, annotation)
Description: Basedata
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note:

Coverage: reg_parks

Description: Regional parks
Source: Central Okanagan Regional District
Date: Data received August 2, 2002
Note:

Coverage: t_parks
Description: Provincial parks
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: park.shp converted to coverage

Coverage: t_pas
Description: Provincial parks and protected areas
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: pas_aug3.shp converted to coverage

Coverage: rec_trails
Description: Regionally significant recreation trails
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note:

Coverage: t_non_crwn
Description: Private Land, Crown Land, Indian Reserves
Source: Provided by Ministry of Sustainable Resource Management
Date: Data received March 19, 2002
Note: non_crwn.shp converted to coverage

Coverage: ir_new
Description: Indian Reserves 11 and 12
Source: Central Okanagan Regional District
Date: Data received June 26, 2002
Note: ir11bound.e00 and ir12bound.e00 were appended and corrected datum

Coverage: roads
Description: Highways
Source: Provided by MSR
Date: Data received August 21, 2002
Note: road1.shp converted to coverage

Appendix L Recreation Features Enhancement Methodology

1. Introduction

The terms of reference for the CORD Crown Land Tourism & Recreation Opportunity Study specified that Ministry of Forests' Recreation Features Inventory (RFI) and Recreation Opportunities Spectrum (ROS) inventory standards be followed. The client provided existing RFI and ROS inventory data in digital format. Review of the existing inventory data indicated that it was relatively old and unreliable and that a significant amount of work would be entailed to redo the inventories. Consequently, the RFI was updated following the principles of the latest MoF standard but in an abbreviated format. A full update of the RFI and ROS was well beyond the scope of the current study.

The following sections describe the deficiencies in the existing data and how an effective approach to updating the information was carried out. The main purpose for carrying out the RFI inventory update was to provide up-to-date and appropriate information for purposes of the tourism and recreation opportunities analysis. These sections also describe and define the main attributes identified in the recreation inventory update and suggest how the information can be used.

2. Purpose and Objectives

The recreation features inventory identifies units (polygons) of land and/or surface water and within each unit describes features (beaches, waterfalls, streams, etc.), existing and potential activities (swimming, hiking, fishing, etc.) and provides a ranking of each unit in terms of its relative significance (very high, high, moderate or low). The current MoF Recreation Feature Inventory standards only allow for the presentation of mapped data as polygons.

In order to fully appreciate tourism opportunities and potential, it is important to identify the location and relative importance of outdoor recreation features and opportunities. The Ministry of Forests normally oversees the production and standards by which recreation feature inventories are carried out on Crown land. This is true for Crown lands both within TFLs (Tree Farm Licenses) and TSA (Timber Supply Area) lands, the two main categories of forest management within the regional district.

For the CORD Tourism study it was anticipated that existing Recreation Features Inventories (RFI) would provide a basis for identifying, locating and describing recreation features and opportunities of relevance to the present tourism study. This inventory information was supplied by CORD to Grant Thornton in digital format and was reviewed by Don Benn.

Sources for the MoF RFI information within the regional district include inventories from the Riverside TFL and Penticton Forest District. Small sections of the inventory also include TSA lands in the Vernon Forest District. Discussion with the recreation officers for the Penticton and Vernon Forest Districts (Roger Venables and Dave McIntosh respectively) indicated that the RFIs are dated, based on an older standard and are of relatively poor quality.

The existing MoF RFI data for the CORD Study Area are *presented* in the latest MoF standard (Version 3.0, 1998). This means that the existing, older inventories were converted to the newer standard by the process of digital roll-over. It appears that the roll-over was carried over from the MoF 1991 standard. This process invariably introduces errors and probably explains the anomalous presence of certain feature and activity codes. The main deficiencies in the existing RFI include:

- features such as marine mammals (A05, A06) and fiords (M16) were found within the Okanagan-based inventories and generally indicated unreliable RFI information
- the original inventory incorporated Visual Sensitivity which contributes to the feature significance ratings, thus biasing the data inappropriately; Visual Sensitivity should only be dealt with by a separate Visual Landscape Inventory
- the existing RFI is often comprised of large polygons with little detail and includes large areas with no RFI attribute information
- the RFI data in DBF spread sheet format is quite disorganized and difficult to use without very time consuming, manual review of each data element or the production of a labeling program to output the maps in a readable format. (A typical list of attributes for a polygon from the MoF RFI is portrayed in Section 13 at the end of this document.)

For these reasons, it was decided to carry out an updated recreation features inventory following existing MoF RFI standards but in abbreviated format. This was largely made feasible because of relatively good, non-stereo (mosaic) air photo coverage for a large proportion of the regional district supplied by CORD.

3. Recreation Feature Inventory Methodology

The Ministry of Forests' RIC standards for recreation features inventory formed the basis for the present inventory update (MoF Version 3.0, 98/10/09). The standards were used in abbreviated form. Only a maximum of six feature and six activity codes were used (in place of the normal eight) and the Recreation Feature Significance ratings were not accompanied by Significance Factors or Recreation Feature Sensitivity ratings. This abbreviated approach allowed for a simpler and more efficient inventory approach. A full inventory update was well beyond the scope of the present project. The draft recreation inventory maps at 1:50,000 scale were digitized in ArcInfo. The following table compares the main inventory attributes:

Main Inventory Attributes	MoF RFI Version 3 Standard	Grant Thornton RFI Update	Existing MoF RFI
Recreation FEATURES	up to eight	up to six	up to three
Recreation ACTIVITIES	up to eight	up to six	up to three
RFP SIGNIFICANCE	yes	yes	yes
SIGNIFICANCE FACTORS (*)	yes	no	no
RFP SENSITIVITY	yes	no	derived from old Management Class

(*) see also Section 8, 1st paragraph

4. Sources of Information

A major source of information was the use of approximately 55 digital air photo images and, for specific areas, normal large scale air photographs. The existing recreation inventories were reviewed as well as a number of other sources. This included a limited amount of field work, reference to tourism, recreation and MoF brochures, user group and industry consultations, LRMP planning documents, topographic maps, Okanagan TSA Lake Classification Summaries, protected areas information, trails and recreation guides and good quality satellite images.

5. Polygon (Map Unit) Attributes

Approximately 300 polygon (map units) were identified. The polygons were drawn onto paper 1:50,000 maps using air photo interpretation and reference to the various information sources. Generally, the polygons are defined by areas with common landform, vegetation and surface water characteristics and associated recreation features or opportunities. For each polygon, five main attributes were recorded:

1. Polygon Number – an unique three-digit number code for each polygon
2. Features – up to a maximum of six feature codes
3. Activities – up to a maximum of six activity codes
4. Significance Class – four classes of relative recreation feature significance
5. Notes – optional notes describing the features or opportunities within a polygon

The polygons and attributes were digitized (.DBF format) and the information formed part of the basis for the tourism and recreation opportunities analysis.

6. Recreation Feature Codes

The MoF standards define about 170 feature codes. Many of these codes do not pertain to the Okanagan region, such as those for marine areas and specific shoreline, hydrologic and glacial features. Opportunities to use any or all of the possible 170 feature codes were made but only 59 found application in the CORD Study Area as listed in the following table.

FEATURE CODES					
A01	fish	G06	esker	R01	exposed bedrock
A02	aquatic habitat	H02	historic structure	R02	internal rock structure
A03	aquatic birds	H04	historic trail/route	R03	mineral deposit
B01	shorelands	L03	talus/scree	T00	general trail or route
B03	crenulated shoreline	M01	frequent small waterbodies	T01	developed land trail
B18	sand beach	M02	small lake (<40ha)	T02	developed snow trail
B26	small island	M03	medium-sized lake (41-200ha)	T03	land route
C02	cultural structure	M04	large lake (201-1000ha)	T04	snow route
C03	cultural use site	M05	very large lake (>1000ha)	W03	large land mammal
D02	rapids and chutes	M13	small stream	W05	wildlife diversity
D06	mineral spring	Q01	canyon, gorge	Y01	developed campsite
D09	waterfall, site-specific	Q02	cliff	Y02	undeveloped campsite
D08	water colour	Q03	fan	Y03	resort
E01	alpine/high subalpine	Q04	gully	Y04	ski facility
E02	regenerating stand	Q05	hill	Y05	silvicultural feature
E03	coniferous forest	Q06	hoodoo		
E04	deciduous forest	Q07	hummocky terrain		
E05	mixed forest	Q08	mountain		
E06	parkland forest	Q09	peak		
E08	wetland vegetation	Q12	ridge		
E09	grassland	Q16	topographic contrast		
E10	meadow				
E11	agricultural				

7. Recreation Activities

The MoF standards define about 100 activity codes. For reasons similar to those for the recreation features, 34 activity codes were applied in the CORD Study Area. Normally, existing and potential activities are differentiated. For purposes of this inventory it was assumed that all activities are existing because of the extensive road access throughout the Study Area. Some activities such as hunting may take place everywhere in the region and were not identified as part of the inventory.

ACTIVITY CODES			
B01	beach activities	K01	cabin/hut use
B02	boating (non-motorized)	K02	cottaging
B03	canoeing	K03	picnicking
B07	sailing	K04	camping
B11	swimming/bathing	M00	motorized lane activity, general
D00	general snow sports	M02	trail bike riding
D01	cross-country skiing	M03	4x4 driving
D03	downhill skiing	M05	snowmobiling
D05	ski touring	M08	boating (motorized)
D06	sledding/tobogganing	M10	water skiing
E02	canyoning	N01	nature study
F01	sport fishing	N02	photography, drawing, painting
F02	ice fishing	Q01	fish run viewing
I01	hiking	Q04	bird watching
I02	mountain biking	Q05	view cultural/historic feature
I03	horseback riding	Q08	scenic viewing
		Q09	wildlife viewing
		R03	rock climbing

8. Feature Significance

The MoF Version 3.0 standards identify four classes of Recreation Feature Significance: VH (very high importance); H (high importance); M (moderate importance); and L (low importance). The MoF Version 3.0 RFI standards provide for the identification of factors that may contribute to Recreation Feature Significance (i.e., uniqueness, current use, access, etc.) but, other than stating that “Significance is a subjective rating used to indicate the relative importance of the polygon to recreation”, the standards do not provide specific criteria for rating Recreation Feature Significance.

For the purposes of the current inventory carried out by Grant Thornton, the following guidelines may help users appreciate how the Feature Significance was applied in the Study Area,

Very High – recreation features and opportunities of very high significance in the region; these features will readily attract recreation use given appropriate access; these are features that represent the best recreation opportunities in the Study Area; ideally, recreation should be the main or only activity in the area

High – recreation features and opportunities of high significance in the region; the features may be relatively common in the region but will attract use given appropriate access

Moderate – recreation features and opportunities that are relatively ubiquitous or very common in the region; by themselves these features may only attract modest use but may be more important as complementary areas to High or Very High areas

Low – recreation features and opportunities of modest significance that are very common and widely distributed in the region; (most areas of Low recreation feature significance where not identified by a polygon).

9. Application of the Updated Recreation Features Inventory Update

The recreation inventory update for this project can be used to identify the location of specific recreation features and/or activities as well as portray the general distribution of areas based on their relative significance. For instance, a query for the location of the Q06 feature would identify the location of any polygons containing a hoodoo or hoodoo-like formation. Similarly, a query for an activity such as F01 would indicate where fishing takes place. In addition, multiple queries linking features, activities and significance can be made.

10. Trails

Comprehensive, accurate trail information was difficult to find for the Study Area. The MoF RFI does refer to trail features but the trail features are found within large, generalized polygons that give no indication of the location or route such trails might have. There appear to be no definitive trail guides published as there are for other regions of the province. The main sources for trail information for the current tourism project included the MoF recreation sites brochure, a Backroad Mapbook (Mussio Venture Series, Vol. III, Kamloops/Okanagan, 2nd edition, 1998), Outdoor Recreation Council Outdoor Recreation Map for Central Okanagan Region (1982) and a few sketch maps and brochures from individual resort operators. This information is portrayed by the recreation inventory update. The LRMP information indicates mapped regional trails but at the relatively small scale of 1:300,000. The LRMP trail locations are not very consistent with the other sources. The LRMP regional trail locations are shown on the recreation base map as separate line data. For these reasons, *the mapped locations of trails for the CORD Study Area should be viewed with caution.*

11. Recreation Opportunities Spectrum (ROS) Inventory

ROS inventories identify the relative remoteness of areas based upon factors such as access, land alterations, human occupation of the land and expected frequency of encounters with people or human activities. The Consulting Team reviewed the ROS inventory and determined that, similar to the RFI, it appeared to be relatively old (between 1991 and 1994). ROS inventory data is very time sensitive and goes out of date rapidly. The existing ROS inventory does not reflect the numerous changes in access, protected area status, industrial activity and recreation use since it was completed. As a consequence, it was not used with the current tourism project and completion of a new ROS inventory was beyond the scope of the present project.

12. Reference

Recreation Features Inventory, Procedures and Standards Manual. Version 3.0. Prepared by the Ministry of Forests, Forest Practices Branch, for the Resources Inventory Committee, October 9, 1998.

13. Typical data record for a polygon from the existing MoF Recreation Features Inventory

Identify Results
 Location: X: 1,490,523. Y: 573,454.

Feature:	Attributes:	
105	Field	Value
	SENSITIV_2	---
	ACTIVITY_3	---
	FEATURE_2	E02
	SENSITIV_3	---
	ACTIVITY_4	---
	FEATURE_3	Q00
	UPDATE_DT	
	HECTARES	20013.687
	ACTIVITY_5	---
	FEATURE_4	---
	PROJECT	RECROLL
	ARFI_CORD_	0
	ACTIVITY_6	---
	FEATURE_5	---
	ACTIVITY_7	---
	FEATURE_6	---
	SENSITIVIT	L
	ACTIVITY_8	---
	FEATURE_7	---
	MAP_NO	
	ALTERATION	-
	FEATURE_8	---
	FeatureId	105
	RATIONALE	[REC_FEA_CL...
	PROVINCIAL	N
	SIGNIF_F1	
	RECORDER	
	SIGNIF_F2	
	CCSM	AL70001000
	SIGNIF_F3	
	FEATURE_SI	M
	RRU_NO	-9999
	DST_CD	DPE
	AREA	198718017.171...
	ACTIVITY_1	h00
	PERIMETER	125350.68367
	SENSITIV_1	m05
	ACTIVITY_2	
	FEATURE_1	E03
	POLY_NO	63

1 features found | arfi_cord | Polygon

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