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 LLP\(^1\).

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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### Stakeholder Group A: Client & Project Steering Committee

<table>
<thead>
<tr>
<th>Stakeholder Organization</th>
<th>Contact</th>
<th>Position</th>
<th>Address</th>
<th>City &amp; Province</th>
<th>Postal Code</th>
<th>Telephone</th>
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<tbody>
<tr>
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<td>762-7011</td>
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<tr>
<td>Ministry of Sustainable Resource Management</td>
<td>Nelson Grant</td>
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<tr>
<td>Ministry of Sustainable Resource Management</td>
<td>Brenda Hartley</td>
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<tr>
<td>Land and Water BC, Inc.</td>
<td>David Bacon</td>
<td>Commercial Recreation Manager</td>
<td></td>
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<td></td>
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### Stakeholder Group B: Government Agencies, Economic Development Agencies, Chamber of Commerce, Tourism Organizations & Associations

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<tr>
<td>Ministry of Energy &amp; Mines</td>
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<td></td>
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<td>Ted McRae</td>
<td>Michael De Jong - Minister</td>
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<td>Drew Carmichael</td>
<td>Joyce Murray - Minister</td>
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<tr>
<td>Water &amp; Land BC Corporation</td>
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*Also on Project Steering Committee*

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<td>Kelowna, BC</td>
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<td>766-0508</td>
<td>766-1091</td>
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### Irrigation Districts

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<th>Stakeholder Organization</th>
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<td>Black Mountain Irrigation District</td>
<td>Phil Roskowsky</td>
<td>Manager</td>
<td>285 Gray Road</td>
<td>Kelowna, B.C.</td>
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<td>Glenmore/Ellison Irrigation District</td>
<td>Nancy Howlett</td>
<td>Manager</td>
<td>445 Glenmore Road</td>
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<tr>
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<td>Bruce Wilson</td>
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<td>#160 Hwy 33 West</td>
<td>Kelowna, B.C.</td>
<td>V1X 1X7</td>
<td>765-5218</td>
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*These contacts are also listed under “Project Steering Committee”*
### Stakeholder Group C: First Nations

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<tr>
<td>Okanagan Nation Alliance</td>
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<td>Executive Director</td>
<td>325C Shannon Lake Road</td>
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<tr>
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### Stakeholder Group D: Tourism Operators & the Travel Trade (Tour Operators & Agencies)

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<td>Air Canada Jazz</td>
<td>Jennifer Leach-Trask</td>
<td>6-5533 Kelowna Airport</td>
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<td>765-5644</td>
<td>765-0081</td>
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<tr>
<td>Air-Hart Aviation</td>
<td>Trevor Erhardt</td>
<td>President</td>
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<td>762-9840</td>
<td><a href="mailto:airhart@home.com">airhart@home.com</a></td>
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<tr>
<td>Beaver Lake Mountain Resort</td>
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<td>Camp Dunlop</td>
<td>Scouts Canada</td>
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<tr>
<td>Chevalier-Ridge Rider</td>
<td>Diana Chevalier</td>
<td>Owners</td>
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<tr>
<td>Cliff's Adventure Holidays Ltd.</td>
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<tr>
<td>Crux Climbing Centre</td>
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<tr>
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<td>Paul &amp; Vivian Burridge</td>
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<td>V0K 2J0</td>
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<td>765-4509</td>
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<td>Jackpine Fishing Camp ???</td>
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<td>V1K 1P5</td>
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<td>Loreen Ruitalt</td>
<td>VP of Operations</td>
<td>2751 Westside Road N</td>
<td>Kelowna, BC</td>
<td>V1Z 3T1</td>
<td>769-3511</td>
<td>769-6665</td>
<td><a href="mailto:info@lakokeanagan.com">info@lakokeanagan.com</a></td>
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<tr>
<td>Lakefront Sports Centre</td>
<td>Anne &amp; Maurice Gervais</td>
<td>Owners</td>
<td>1310 Water Street</td>
<td>Kelowna, BC</td>
<td>V1Y 9P3</td>
<td>862-2469</td>
<td>n/a</td>
<td><a href="mailto:fun@sparkysrentals.com">fun@sparkysrentals.com</a></td>
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<tr>
<td>Laurian Quarter Horses</td>
<td>Laurie Takoff</td>
<td>Owner</td>
<td>2890 Schram Road</td>
<td>Kelowna, BC</td>
<td>V1P 1K2</td>
<td>765-7228</td>
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<td>President</td>
<td>1591 Highland Drive North</td>
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<td>Myra Stable</td>
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<td>Ross Suttcliffe</td>
<td>President</td>
<td>P.O. Box 105 PBC</td>
<td>Kelowna, BC</td>
<td>V1Y 7N3</td>
<td>769-5158</td>
<td>762-4266</td>
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<tr>
<td>Okanagan Adventure Co.</td>
<td>Leah Thatchuck</td>
<td>Sales Co-ordinator</td>
<td>1330 Water Street</td>
<td>Kelowna, BC</td>
<td>V1Y 9P4</td>
<td>491-9155</td>
<td>491-9175</td>
<td><a href="mailto:leah@northwestgolftours.com">leah@northwestgolftours.com</a></td>
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<tr>
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**Notes:**
- Field names and phone numbers were extracted from the document.
- Email addresses were also included where available.
- The document is a draft and may contain omissions or errors.
- The layout is consistent with a natural reading format.
Stakeholder Organization Group E: Recreational Clubs and Organizations

<table>
<thead>
<tr>
<th>Stakeholder Organization</th>
<th>Contact</th>
<th>Position</th>
<th>Address</th>
<th>City &amp; Province</th>
<th>Postal Code</th>
<th>Telephone</th>
<th>Fax</th>
<th>Email</th>
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</thead>
<tbody>
<tr>
<td>Kettle Valley Trail Organization</td>
<td>Brian ??</td>
<td>number ?</td>
<td>2080 Saucier Road</td>
<td>Kelowna, BC</td>
<td>V1W 4C1</td>
<td>764-4533</td>
<td>764-4536</td>
<td>rick&amp;<a href="mailto:ann@telus.net">ann@telus.net</a></td>
</tr>
<tr>
<td>Back Country Horseman Assoc.</td>
<td>Isabelle Pritchard</td>
<td>President</td>
<td>3041 Casorso Road</td>
<td>Kelowna, BC</td>
<td>V1V 1W6</td>
<td>764-7435</td>
<td>764-7558</td>
<td><a href="mailto:jno@telus.net">jno@telus.net</a></td>
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<tr>
<td>Fish and Game Club</td>
<td>Rick Percieval</td>
<td>Range Manager</td>
<td>2715 Hewlett Road</td>
<td>Kelowna, BC</td>
<td>V1V 1B4</td>
<td>762-4846</td>
<td>762-4747</td>
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<tr>
<td>Lonely Loin Fly Fisher's</td>
<td>Terry Trinfield</td>
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<td>2041 Tabi Road</td>
<td>Kelowna, BC</td>
<td>V1V 1G1</td>
<td>548-3349</td>
<td>548-3349</td>
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<tr>
<td>Kelowna Riding Club</td>
<td>Carol Schilneberger</td>
<td>President</td>
<td>3745 Gordon Drive</td>
<td>Kelowna, BC</td>
<td>V1W 4M8</td>
<td>491-2265</td>
<td>491-2265</td>
<td><a href="mailto:tscott@telus.net">tscott@telus.net</a></td>
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<tr>
<td>ATV Club - Kelowna</td>
<td>Cole Haddad</td>
<td>message</td>
<td>3745 Gordon Drive</td>
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<tr>
<td>Kelowna Dirt Bike Club</td>
<td>Terry Burke</td>
<td>Treasurer</td>
<td>Box 2643, 34 St. R.</td>
<td>Kelowna, BC</td>
<td>V1X 6A7</td>
<td>765-4346</td>
<td>765-4346</td>
<td><a href="mailto:tscott@telus.net">tscott@telus.net</a></td>
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<tr>
<td>Rock and Gem Club</td>
<td>Ken Dewerson</td>
<td>President</td>
<td>338-2338 Butt</td>
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<td>V1T 3K5</td>
<td>765-9548</td>
<td>765-9548</td>
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<tr>
<td>Spelunking - Caves</td>
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<td>763-2936</td>
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<tr>
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<td>Kelowna, BC</td>
<td>V1X 1N6</td>
<td>765-4504</td>
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<tr>
<td>Canoe and Kayak Club</td>
<td>Bob Gasser</td>
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<td>160 Douglas Rd North</td>
<td>Kelowna, BC</td>
<td>V1X 3K5</td>
<td>765-9548</td>
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<tr>
<td>Kayak and Canoe Club</td>
<td>Doug Hartley</td>
<td>Treasurer</td>
<td>Suite 101, 14411 Ellis Street</td>
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<td>762-2112</td>
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<tr>
<td>Cross Country Ski Club</td>
<td>Ross Suttcliffe</td>
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<td>762-4266</td>
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<tr>
<td>Nordic</td>
<td>Clive Gilbert</td>
<td>President</td>
<td>PO Box 26072</td>
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<td>V1T 2G3</td>
<td>769-4406</td>
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<tr>
<td>Telermark</td>
<td>Tom Witt</td>
<td>Ski tourist co-ordinator</td>
<td>PO Box 105 PBC</td>
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<td>Ross Suttcliffe</td>
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<td>Mike Motschuk</td>
<td>message</td>
<td>PO Box 26072</td>
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<td>Hiking Club</td>
<td>Pat Westheuser</td>
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<td>PO Box 82</td>
<td>East Kelowna, BC</td>
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<td>769-6605</td>
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<tr>
<td>Western Canada Wilderness Committee</td>
<td>Bruce Sumner</td>
<td>number ?</td>
<td>PO Box 82</td>
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<tr>
<td>Tour DeVines Society</td>
<td>Brad Lee</td>
<td>Chairperson</td>
<td>888 W. Westminster Ave.</td>
<td>Penticton, BC</td>
<td>V2A 8S2</td>
<td>1800-6663-1900</td>
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## Stakeholder Group F: Other Resource Users/Industries & Related Associations / Organizations

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<th>Position</th>
<th>Address</th>
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<th>Telephone</th>
<th>Fax</th>
<th>Email</th>
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<tr>
<td>Riverside Forest Products Ltd.</td>
<td>Mike Doiron</td>
<td>Forestry Planner</td>
<td>820 Guy St.</td>
<td>Kelowna, BC</td>
<td>V1Y 7R5</td>
<td>762-3411</td>
<td>470-4375</td>
<td><a href="mailto:mjdoiron@riverside.bc.ca">mjdoiron@riverside.bc.ca</a></td>
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<td>Gorman Bros.</td>
<td>Nick Arkle</td>
<td>Woodlands manager</td>
<td>Box 26052</td>
<td>Westbank, BC</td>
<td>V4T 2G3</td>
<td>768-5131</td>
<td>768-2822</td>
<td><a href="mailto:narke@gormanbros.com">narke@gormanbros.com</a></td>
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<tr>
<td>Interior Lumber Manufacturers’ Association</td>
<td>Peter Affleck</td>
<td>Forestry manager</td>
<td>360-1855 Kirschner Road</td>
<td>Kelowna, BC</td>
<td>V1Y 4N7</td>
<td>860-9663</td>
<td>860-0009</td>
<td><a href="mailto:paffeck@ilmia.com">paffeck@ilmia.com</a></td>
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<td>BC Agricultural Council</td>
<td>Steve Thomson</td>
<td>Executive Director</td>
<td>102-1482 Springfield Road</td>
<td>Kelowna, BC</td>
<td>V1Y 5V3</td>
<td>763-9790</td>
<td>762-2997</td>
<td><a href="mailto:bcac@bcagcouncil.com">bcac@bcagcouncil.com</a></td>
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<tr>
<td>BCFG&amp;A  (Agri-Tourism)</td>
<td>Glen Lucas</td>
<td>Executive Director/CEO</td>
<td>1473 Water Street</td>
<td>Kelowna, BC</td>
<td>V1Y 1J6</td>
<td>762-5226</td>
<td>861-9089</td>
<td><a href="mailto:bcfga@bcagcouncil.com">bcfga@bcagcouncil.com</a></td>
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<tr>
<td>BC Wine Institute</td>
<td>Len Bykowski</td>
<td>President</td>
<td>9312 Jubilee Road</td>
<td>Summerland, BC</td>
<td>V0H 120</td>
<td>250-494-9772</td>
<td>250-494-5704</td>
<td><a href="mailto:Bykwedsk@bctrial.bc.ca">Bykwedsk@bctrial.bc.ca</a></td>
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<tr>
<td>BC Cattlemans’ Association</td>
<td>David Borth</td>
<td>CEO</td>
<td>Agri-Centre #4 10145 Dallas Drive</td>
<td>Kamloops, BC</td>
<td>V2C 6T4</td>
<td>250-573-3611</td>
<td>250-573-5155</td>
<td><a href="mailto:bccattles@kamloops.net">bccattles@kamloops.net</a></td>
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Appendix B  List of Tour Operators, Businesses and Recreational Clubs
<table>
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<tr>
<td>Alpine Club of Canada</td>
<td>Dave Urness</td>
<td>927 Tataryn Rd</td>
<td>Kelowna, BC</td>
<td>V1X 1N6</td>
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<tr>
<td>Back Country Horseman of BC</td>
<td>Isabel Pritchard</td>
<td>2080 Saucier Road</td>
<td>Kelowna, BC</td>
<td>V1W 4C1</td>
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<tr>
<td>Beaver Lake Mountain Resort</td>
<td>Alex Bussmann</td>
<td>6350 Beaver Lake Rd.</td>
<td>Winfield, BC</td>
<td>V4V 1T7</td>
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<td>Black Mountain Irrigation District (Horses)</td>
<td>Phil Roskowski</td>
<td>285 Gray Road</td>
<td>Kelowna, B.C.</td>
<td>V1X 1W8</td>
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<td>Camp Dunlop</td>
<td>Laurie Takoff</td>
<td>2880 Schram Road</td>
<td>Kelowna, BC</td>
<td>V1P 1K2</td>
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<tr>
<td>Canoe and Kayak Club</td>
<td>Bob Gasser</td>
<td>160 Dougall Rd North</td>
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<td>Canyon Stables</td>
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<td>1-4561 McCulloch Road</td>
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<td>Central Okanagan Hiking Club</td>
<td>Mike Motschko</td>
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<td>Chevallier-Ridge Rider</td>
<td>Diana Chevallier</td>
<td>4020 Dryden Road</td>
<td>Peachland, BC</td>
<td>V0H 1X0</td>
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<tr>
<td>Chute Lake Resort</td>
<td>Doreen Reed</td>
<td>797 Alexander Ave</td>
<td>Penitcton, BC</td>
<td>V2A 1E6</td>
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<tr>
<td>Cliff's Adventure Holidays Ltd.</td>
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<td>3223 Woodside Road</td>
<td>Winfield, BC</td>
<td>V4V 1X7</td>
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<td>Crux Climbing Centre</td>
<td>Glen</td>
<td>2 - 1414 Hunter Court</td>
<td>Kelowna, BC</td>
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<td>Curtis Nylu's Taxidermy</td>
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<td>11361 Highway 33 E</td>
<td>Kelowna, BC</td>
<td>V1P 1K1</td>
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<td>Lac La Hache, BC</td>
<td>V0K 1T0</td>
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<td>Carlo Elstak</td>
<td>Douglas Lake Road</td>
<td>Kelowna, BC</td>
<td>V0E 1S0</td>
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<tr>
<td>Eight Mile Ranch</td>
<td>Kim Stinson</td>
<td>5983 Hwy 33E</td>
<td>Kelowna, BC</td>
<td>V1P 1H8</td>
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<tr>
<td>Service</td>
<td>Brad Tomnuk</td>
<td>Beaver Lake Road</td>
<td>Winfield, BC</td>
<td>V4V 1S5</td>
</tr>
<tr>
<td>Fish and Game Club</td>
<td>Manager</td>
<td>4087 Casorso Road</td>
<td>Kelowna, BC</td>
<td>V1W 4N6</td>
</tr>
<tr>
<td>GeoQwest Excursions</td>
<td>Steve Noakes</td>
<td>1734 Keloka Drive</td>
<td>Kelowna, BC</td>
<td>V1Z 2X1</td>
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<tr>
<td>Girl Guide Arbuckle</td>
<td>Margret</td>
<td>14750 Carrs Landing Road</td>
<td>Kelowna, BC</td>
<td>V4V 1C5</td>
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<tr>
<td>Glenmore/Ellison Irrigation District</td>
<td>Nancy Howlett</td>
<td>445 Glenmore Road</td>
<td>Kelowna, B.C.</td>
<td>V1V 1V6</td>
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<tr>
<td>Grandeeza Caballo Del</td>
<td></td>
<td>4121 Anderson Road</td>
<td>Kelowna, BC</td>
<td>V1X 7V8</td>
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<td>Greenscene Getaways</td>
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<td>809 Stockwell Ave</td>
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<tr>
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<td>Ross Sutcliffe</td>
<td>PO Box 105 PBC</td>
<td>Kelowna, BC</td>
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<tr>
<td>Idabel Lake Resort Band</td>
<td>Paul &amp; Vivian Burrige</td>
<td>4-12000 Hwy 33E</td>
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<tr>
<td>Idabel Lake Resort Band</td>
<td>Randy Marchand</td>
<td>58 C20 RR7 Westside Road</td>
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<tr>
<td>Kayak and Conoe Club</td>
<td>Doug Hartley</td>
<td>Suite 101 1441 Ellis Street</td>
<td>Kelowna, BC</td>
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<tr>
<td>Kelowna ATV Club</td>
<td>Cole Haddad</td>
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<tr>
<td>Kelowna Dirt Bike Club</td>
<td>Terry Burke</td>
<td>Box 2643 Stn. R.</td>
<td>Kelowna, BC</td>
<td>V1X 6A7</td>
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<tr>
<td>Kelowna Riding Club</td>
<td>Carol Schellineberger</td>
<td>3745 Gordon Drive</td>
<td>Kelowna, BC</td>
<td>V1W 4M8</td>
</tr>
<tr>
<td>Kelowna Riding Club</td>
<td>Anita Lawry</td>
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<td>Lakefront Sports Centre</td>
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<tr>
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<td></td>
<td>2570 Bartley Road</td>
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<td>V1Z 2M8</td>
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<tr>
<td>Name of Business or Organization</td>
<td>Contact Name</td>
<td>Address</td>
<td>City &amp; Province</td>
<td>Postal Code</td>
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<td>Nancy &amp; Jim Pollard</td>
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<td>Ed Kruger</td>
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<td>Pat Westheuser</td>
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<td></td>
<td></td>
</tr>
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<td>Kelowna, BC</td>
<td>V1Y 7N3</td>
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<td>Ross Sutcliffe</td>
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<tr>
<td>Okanagan Events</td>
<td>Sharon Baert</td>
<td>920 Theodora Road</td>
<td>Kelowna, BC</td>
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<td>Okanagan Flyfishing Outfitters</td>
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<td>Patricia Petreau</td>
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<td>Okanagan Wine Festival Society</td>
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<td>Orchard Country Ski Club</td>
<td>Tom Witt</td>
<td></td>
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<td>Postill Lake Lodge</td>
<td>Dave Cory Goldfinch</td>
<td>Box 854</td>
<td>Kelowna, BC</td>
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<tr>
<td>Rock and Gem Club</td>
<td>Ken Dewerson</td>
<td>338-2330 Butt Road</td>
<td>Westbank, BC</td>
<td>V4T 2L3</td>
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<td>Rock and Gem Club</td>
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<td>338-2330 Butt Road</td>
<td>Westbank, BC</td>
<td>V4T 2L3</td>
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<td>Rutland Irrigation District</td>
<td>Bruce Wilson</td>
<td>#160 Hwy 33 West</td>
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<td>V1X 1X7</td>
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<td>3235 Gulley Road</td>
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<td>25-500 Larch Place</td>
<td>Gold River, BC</td>
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<td>Summerland, BC</td>
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<td>Sunwest Tours (1987)</td>
<td>participating</td>
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<td>Clive Gilbert</td>
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<td>Westbank, BC</td>
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<td>Tour DeVines Society</td>
<td>Brad Lee</td>
<td>888 W. Westminster Ave.</td>
<td>Penticton, B.C.</td>
<td>V2A 8S2</td>
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<td>Tykes Can Tour</td>
<td>Joe Kyle</td>
<td>775 Camelia</td>
<td>Kelowna, BC</td>
<td>V1X 3M9</td>
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<tr>
<td>Vista Treks</td>
<td>Craig Henderson</td>
<td>Box 186</td>
<td>Naramata, BC</td>
<td>VDH 1N0</td>
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<tr>
<td>Committee</td>
<td>Bruce Sumner</td>
<td>PO Box 82</td>
<td>BC</td>
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<td>Winds &amp; Rivers Escapes Ltd.</td>
<td>Reg Scott</td>
<td>3201 Pleasant Valley Road</td>
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<td>Windsong Farm</td>
<td>Ingrid Dicks</td>
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<td>Kelowna, BC</td>
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<td>Y. U. Ranch</td>
<td>Colin Thomson</td>
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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. Accommodation (urban/city/town/roadside)
2. Accommodation (resort/outdoor/adventure)
3. Attraction / Museum / Entertainment
4. Tourism Business/Operator (urban)
5. Tourism Business/Operator (outdoor)
6. Tourism Organization, DMO, Assoc.
7. Travel InfoCentre
8. Restaurant/Pub
9. Retail
10. Travel Trade (tour operator/travel agency)
11. Transportation Service/Operator
12. Academic Institution (instructor/professor)
13. Student
14. Gov. Ministry (Tourism)
15. Crown Corp. (Tourism)
17. Other Industry (specify)
18. Convention/Exhibition Centre
19. Meeting/Event Planner/Support Services

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

1. **Development Opportunities**
   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.

2. **Expansion Opportunities**
   What are the Central Okanagan’s opportunities in terms expanding existing tourism activities or products?

3. **Packaging Opportunities**
   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?
   
   If yes, please describe these opportunities.

### C. Tourism & Commercial Recreation – Interactions

1. **Areas of Interaction**
   
   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.

   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.

2. **Areas of Potential Collaboration**
   Do you think there are opportunities to collaborate more with tourism and recreational interests? If yes, please describe these opportunities.

### D. Other Comments

1. Do you have any other comments or ideas regarding the future of tourism and commercial recreation in the Central Okanagan?
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
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.)*

<table>
<thead>
<tr>
<th>Category</th>
<th>Description/Type</th>
<th>Capacity</th>
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</thead>
<tbody>
<tr>
<td>Accommodation facility</td>
<td>__________________________</td>
<td>Units _____ Campsites _____</td>
</tr>
<tr>
<td>Outdoor Recreation facility</td>
<td>__________________________</td>
<td>Total at-one-time participants</td>
</tr>
<tr>
<td>Tour Operator</td>
<td>__________________________</td>
<td>Total at-one-time participants</td>
</tr>
<tr>
<td>Other</td>
<td>__________________________</td>
<td></td>
</tr>
</tbody>
</table>

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.

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<td>• 10 attribute items</td>
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**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;
- tfi_cord.e00 – ArcInfo export coverage of tourism line features;
- tfpa_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:
  o Government / Tourism Agencies and Organizations
  o First Nations
  o Tourism Operators
  o Recreation Clubs
  o 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 subheadings:

- 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

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Name of Business or Organization</th>
<th>Contact Name</th>
<th>Address</th>
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<td>Beaver Lake Mountain Resort</td>
<td>Alex Bussmann</td>
<td>5350 Beaver Lake Rd.</td>
<td>Kelowna, BC</td>
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<td>CORD-CLI-2</td>
<td>Postill Lake Lodge</td>
<td>Dave Cory</td>
<td>Box 854</td>
<td>Kelowna, BC</td>
<td>V1Y 7P5</td>
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<td>Ingrid Dicks</td>
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<td>Jim Cournin</td>
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<td>Chute Lake Resort</td>
<td>Donen Read</td>
<td>797 Alexander Ave</td>
<td>Pentlton, BC</td>
<td>V2A 1E9</td>
<td>250-493-3535</td>
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<td>Eight Mile Ranch</td>
<td>Kim Stinson</td>
<td>5983 Hey 33E</td>
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<td>V1P 1H8</td>
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<td>Jim Hamden</td>
<td>Box 20023</td>
<td>T.C.M. Kelowna, BC</td>
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<td>Nancy &amp; Jim Pollard</td>
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<td>Steve Noakes</td>
<td>1734 Kanda Drive</td>
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<td>Ed Kruger</td>
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<td>Joel Redda</td>
<td>161 Beach Avenue</td>
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<td>775 Camelia</td>
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<td>Brad Trommik</td>
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<td>Okanagan Adventure Co.</td>
<td>Leah Thatchuk</td>
<td>330 Water Street</td>
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<td>Back Country Horseman of BC</td>
<td>Isabel Pritchard</td>
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<td>Terry Burdie</td>
<td>Box 2643 Sth. R.</td>
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<tr>
<td>CORD-CLI-27</td>
<td>Business - Stable (Laurian Quarter Horses)</td>
<td>Laurie Takoff</td>
<td>2800 Schwarm Road</td>
<td>Kelowna, BC</td>
<td>V1P 1K2</td>
<td>250-765-7228</td>
<td>250-765-7228</td>
<td><a href="mailto:laurianquarterhorses@telus.net">laurianquarterhorses@telus.net</a></td>
<td>AO04</td>
</tr>
<tr>
<td>CORD-CLI-28</td>
<td>Okanagan Hiking Club</td>
<td>Ross Sutcliffe</td>
<td>PO Box 105 PBC</td>
<td>Kelowna, BC</td>
<td>V1Y 7N3</td>
<td>250-769-5158</td>
<td>250-762-4266</td>
<td><a href="mailto:westmigh@silk.net">westmigh@silk.net</a></td>
<td>AO04</td>
</tr>
<tr>
<td>CORD-CLI-29</td>
<td>Crystal Mountain</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-30</td>
<td>Kelowna Mountain Bike Club</td>
<td>Don Billard</td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-31</td>
<td>Dee Lake Resort</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-32</td>
<td>Okanaka Lake Resort</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-33</td>
<td>Okanaka Lake Resort</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-34</td>
<td>Mandy &amp; Mc Trail Riding</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CORD-CLI-35</td>
<td>Outback Cycle &amp; Sport</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>CORD-CLI-36</td>
<td>Isadell Lake Resort</td>
<td></td>
<td>250-762-9724</td>
<td>None</td>
<td>AO04</td>
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<td></td>
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</tr>
<tr>
<td>Tour Type Code</td>
<td>Primary Activities Offered/Sold</td>
<td>Secondary Activities Offered/Sold</td>
<td>Capacity</td>
<td>Business/Organization Type</td>
<td>Land Status</td>
<td># of Years Operating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------</td>
<td>----------------------------------</td>
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<td>-----------------------------</td>
<td>-------------</td>
<td>---------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00/K01/K04/F00</td>
<td>F01/F02/K01/K03/K031/K044/K000</td>
<td>16 Cabins, 40 Campsites, Total 250 at-one time</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>82</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00/K01/K04/F00</td>
<td>F01/F02/K01/K03/K034/K044/N00</td>
<td>55 Units, 10 Campsites</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>55</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00</td>
<td>N00</td>
<td>5 Units</td>
<td>PROFIT</td>
<td>PRIVATE</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K04</td>
<td>F01/F02/K01/K03/K034/N00</td>
<td>150 tent sites with 1 large lodge, 2 cabins at hydraulic site</td>
<td>NPO</td>
<td>PRIVATE</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K03/K03/K04</td>
<td>N00/Q00</td>
<td>2 cabins, campsites</td>
<td>PROFIT</td>
<td>PRIVATE</td>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K04/I01/K04/K04</td>
<td>E00/K00/F00</td>
<td>84 campers divided into 5 cabins</td>
<td>NPO</td>
<td>MIXED</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00</td>
<td>F01/F02/K01/K03/K034/N00</td>
<td>100 Rooms</td>
<td>PROFIT</td>
<td>PRIVATE</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00</td>
<td>F01/F02/K01/K03/K044/N00</td>
<td>8 cabins, 1-plex chalet, dining room - seats 45</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R16</td>
<td>R03</td>
<td>20 climbers</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R11</td>
<td>R03</td>
<td>N00/F01/Q04/K03/Q00</td>
<td>up to 7 people</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R15</td>
<td>R02</td>
<td>D08/K03/N00/K04</td>
<td>85 people</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R11</td>
<td>R03/02</td>
<td>D08/N00</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R15</td>
<td>R02</td>
<td>D08/K03/N00</td>
<td>10 people</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R04</td>
<td>F00/F20</td>
<td>N00/K03</td>
<td>Up to 50</td>
<td>PROFIT</td>
<td>LEASED</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R15/R11</td>
<td>R02</td>
<td>D08/K03/N00/K04</td>
<td>No specific capacity - they manage/organize tours with other operators</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R00</td>
<td>D08/K03/N00</td>
<td>additional vehicles rented for groups of 20+</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R18</td>
<td>R01</td>
<td>D01</td>
<td>750 members</td>
<td>NPO</td>
<td>LEASED</td>
<td>37</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R17</td>
<td>R03</td>
<td>N01</td>
<td>500 members</td>
<td>NPO</td>
<td>MIXED</td>
<td>11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R02</td>
<td>R01</td>
<td>N01</td>
<td>500 members</td>
<td>NPO</td>
<td>LEASED/MIXED</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R06</td>
<td>G06</td>
<td>N01</td>
<td>40 members</td>
<td>NPO</td>
<td>LEASED/MIXED</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R00</td>
<td>G06</td>
<td>K03/K04/Q09</td>
<td>500 members</td>
<td>NPO</td>
<td>LEASED/MIXED</td>
<td>100</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R18</td>
<td>R09</td>
<td>G01</td>
<td>450 members</td>
<td>NPO</td>
<td>LEASED</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R04</td>
<td>R02</td>
<td>F02</td>
<td>38 members</td>
<td>NPO</td>
<td>MIXED</td>
<td>38</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R01</td>
<td>R01</td>
<td>N00</td>
<td>250 members</td>
<td>NPO</td>
<td>MIXED</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R11</td>
<td>R01</td>
<td>N01/K03/Q08/Q09</td>
<td>200 members</td>
<td>NPO</td>
<td>MIXED</td>
<td>20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R17</td>
<td>R03</td>
<td>N01/K03/Q08/Q09</td>
<td>8 people</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R11</td>
<td>R01/04</td>
<td>N00</td>
<td>120 members</td>
<td>NPO</td>
<td>MIXED</td>
<td>40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R02</td>
<td>N01</td>
<td>N0</td>
<td>NPO</td>
<td>MIXED</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00/K01/K04/F00</td>
<td>F03/Q03/K01/02/K031/K044/N00</td>
<td>20 cabins and 10 campsites</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>70</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00/K01/K04/F00</td>
<td>F01/F02/K01/K03/K034/K044/N00</td>
<td>8 cabins and 8 campsites</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R17</td>
<td>R03</td>
<td>N01/K03/Q08/Q09</td>
<td>15 people</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>R15</td>
<td>R02</td>
<td>D08/K03/K00/K04</td>
<td>10</td>
<td>PROFIT</td>
<td>MIXED</td>
<td>9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K00</td>
<td>F01/F02/K01/K03/K044/N00</td>
<td>8 cottages, 6 suites in lodge</td>
<td>PROFIT</td>
<td>LEASE</td>
<td>30</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th></th>
<th># of Rooms/Sites</th>
<th>Est. Annual Room/Site Occupancy</th>
<th># of Rooms/Sites Sold</th>
<th>Est. Average Room/Site Rate</th>
<th>Est. Revenue Generated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resorts/Lodges</td>
<td>75</td>
<td>55.6%</td>
<td>9,882</td>
<td>$72.89</td>
<td>$720,363</td>
</tr>
<tr>
<td>Campgrounds</td>
<td>505</td>
<td>51.1%</td>
<td>51,368</td>
<td>$17.08</td>
<td>$877,569</td>
</tr>
<tr>
<td>Total</td>
<td>580</td>
<td>61.2%</td>
<td>61,250</td>
<td>$1,597,932</td>
<td></td>
</tr>
</tbody>
</table>


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)

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


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), the number of jobs (full time equivalent) attributed to tourism within the Study Area is 110.

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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 edutainment 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)”.

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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.

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

5 Canada Customs and Revenue Agency website www.ccra-adrc.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."

- 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.

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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 Roundtable\textsuperscript{7}. 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 11\textsuperscript{th} 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.

Table 1 – Overnight Visitor Volume (000)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N. America</td>
<td>19,502</td>
<td>19,709</td>
<td>20,258</td>
<td>20,600</td>
<td>20,801</td>
<td>92%</td>
<td>6.7%</td>
<td>20,748</td>
<td>20,603</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>897</td>
<td>907</td>
<td>774</td>
<td>843</td>
<td>897</td>
<td>4%</td>
<td>0.0%</td>
<td>852</td>
<td>834</td>
</tr>
<tr>
<td>Europe</td>
<td>633</td>
<td>616</td>
<td>623</td>
<td>671</td>
<td>666</td>
<td>3%</td>
<td>5.2%</td>
<td>619</td>
<td>608</td>
</tr>
<tr>
<td>Other Int'l</td>
<td>110</td>
<td>124</td>
<td>142</td>
<td>144</td>
<td>153</td>
<td>1%</td>
<td>39.0%</td>
<td>143</td>
<td>136</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>21,142</td>
<td>21,356</td>
<td>21,796</td>
<td>22,258</td>
<td>22,517</td>
<td>100%</td>
<td>6.5%</td>
<td>22,362</td>
<td>22,181</td>
</tr>
</tbody>
</table>

Source: Tourism British Columbia

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

Table 2 – Visitor Revenue ($ millions)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N. America</td>
<td>6,713</td>
<td>6,895</td>
<td>7,254</td>
<td>7,529</td>
<td>7,720</td>
<td>82%</td>
<td>15.0%</td>
<td>7,601</td>
<td>7,436</td>
</tr>
<tr>
<td>Asia Pacific</td>
<td>916</td>
<td>942</td>
<td>821</td>
<td>911</td>
<td>984</td>
<td>10%</td>
<td>7.4%</td>
<td>919</td>
<td>894</td>
</tr>
<tr>
<td>Europe</td>
<td>630</td>
<td>611</td>
<td>625</td>
<td>683</td>
<td>693</td>
<td>7.3%</td>
<td>10.0%</td>
<td>638</td>
<td>622</td>
</tr>
<tr>
<td>Other Int'l</td>
<td>54</td>
<td>62</td>
<td>72</td>
<td>74</td>
<td>79</td>
<td>0.8%</td>
<td>46.3%</td>
<td>74</td>
<td>70</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$8,314</td>
<td>$8,510</td>
<td>$8,771</td>
<td>$9,197</td>
<td>$9,477</td>
<td>100%</td>
<td>14.0%</td>
<td>$9,232</td>
<td>$9,022</td>
</tr>
</tbody>
</table>

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 Columbia\(^8\), 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.

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**

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

Table 4 – BC Residents Overnight Visitors Expectations

<table>
<thead>
<tr>
<th>Expectations</th>
<th>Total</th>
<th>GVRD</th>
<th>South</th>
</tr>
</thead>
<tbody>
<tr>
<td>All leisure and business visitors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visiting a place that takes good care of its environment</td>
<td>50</td>
<td>49</td>
<td>53</td>
</tr>
<tr>
<td>- Getting value for the cost of the trip</td>
<td>47</td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>- Learning new things, increasing my knowledge</td>
<td>28</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Leisure visitors</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Resting or Relaxing</td>
<td>64</td>
<td>63</td>
<td>66</td>
</tr>
<tr>
<td>- Going to a place that is good for the family</td>
<td>48</td>
<td>47</td>
<td>49</td>
</tr>
<tr>
<td>- Being physically active</td>
<td>45</td>
<td>44</td>
<td>47</td>
</tr>
</tbody>
</table>


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

<table>
<thead>
<tr>
<th>Outdoor Activities in the Province</th>
<th>Non-Resident Total %</th>
<th>Regional Can %</th>
<th>Origin</th>
<th>Overseas All %</th>
<th>Southern BC Resident %</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Net) Land-based Activities</td>
<td>78</td>
<td>78</td>
<td>N.A.</td>
<td>96</td>
<td>51</td>
</tr>
<tr>
<td>- Visiting National/Provincial Park</td>
<td>63</td>
<td>63</td>
<td>81</td>
<td>95</td>
<td>18</td>
</tr>
<tr>
<td>- Wildlife viewing/bird watching</td>
<td>50</td>
<td>51</td>
<td>33</td>
<td>78</td>
<td>30</td>
</tr>
<tr>
<td>- Camping</td>
<td>31</td>
<td>40</td>
<td>18</td>
<td>25</td>
<td>-</td>
</tr>
<tr>
<td>- Hiking/backpacking</td>
<td>35</td>
<td>36</td>
<td>20</td>
<td>51</td>
<td>22</td>
</tr>
<tr>
<td>- Exploring backcountry wilderness</td>
<td>28</td>
<td>32</td>
<td>17</td>
<td>34</td>
<td>-</td>
</tr>
<tr>
<td>- Bicycling</td>
<td>22</td>
<td>30</td>
<td>7</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>(Net) Winter Activities</td>
<td>16</td>
<td>20</td>
<td>3</td>
<td>20</td>
<td>5</td>
</tr>
<tr>
<td>- Downhill Skiing/snowboarding</td>
<td>15</td>
<td>20</td>
<td>2</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>(Net) Marine-based Activities</td>
<td>20</td>
<td>26</td>
<td>4</td>
<td>21</td>
<td>-</td>
</tr>
</tbody>
</table>
Outdoor Activities in the Province | Non-Resident Total % | 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.) | - | - | - | - | -
- Lake boating (sail/power) | 24 | 27 | 9 | 34 | -
(Net) Fishing | - | - | - | - | -
- Saltwater fishing | 14 | 15 | 1 | 10 | 14
- Freshwater fishing | 7 | 10 | 1 | 1 | -
(Net) Boating (BC resident) | - | - | - | - | 12
Photography | 62 | 62 | 73 | 62 | 35
Swimming | 43 | 49 | 31 | 31 | -
Golfing | 29 | 38 | 18 | 8 | 7
Sightseeing | - | - | - | - | 40


**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**

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Built Attractions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adventure</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural Experience</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Fishing</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Get-Aways</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Guest Ranches</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Spas</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Sightseeing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ski (BC)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ski (Promotion of Thompson Okanagan &amp; BC Rockies)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Niche Products</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wildlife Viewing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Niche Tours (spring blossoms &amp; hot springs)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Built Attractions</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Adventure</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Cultural Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fishing</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Get-Aways</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Guest Ranches</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Touring</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Spas</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Sightseeing</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Ski (BC)</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Ski (Promotion of Thompson Okanagan &amp; BC Rockies)</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Outdoor Activities</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Niche Products</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Wildlife Viewing</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Niche Tours (spring blossoms &amp; hot springs)</td>
<td></td>
<td>√</td>
</tr>
</tbody>
</table>

### 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.

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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

<table>
<thead>
<tr>
<th>Destinations visited in the Region</th>
<th>Non-Resident Total %</th>
<th>Regional Canada %</th>
<th>BC Resident Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Thompson-Okanagan (Net)</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Kelowna/Central Okanagan</td>
<td>55</td>
<td>57</td>
<td>5</td>
</tr>
<tr>
<td>Vernon/North Okanagan</td>
<td>35</td>
<td>40</td>
<td>24</td>
</tr>
<tr>
<td>Penticton Area</td>
<td>29</td>
<td>26</td>
<td>24</td>
</tr>
<tr>
<td>South Okanagan</td>
<td>22</td>
<td>20</td>
<td>9</td>
</tr>
<tr>
<td>Similkameen</td>
<td>13</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>General S. Thompson-Okanagan</td>
<td>3</td>
<td>1</td>
<td>-</td>
</tr>
</tbody>
</table>


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

<table>
<thead>
<tr>
<th>Season of Travel</th>
<th>Regional</th>
<th>Long Haul</th>
<th>Overseas</th>
<th>BC Resident</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Can %</td>
<td>US %</td>
<td>Can %</td>
<td>US %</td>
</tr>
<tr>
<td>Spring (April and May)</td>
<td>9</td>
<td>10</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>Summer (June to September)</td>
<td>64</td>
<td>49</td>
<td>64</td>
<td>82</td>
</tr>
<tr>
<td>Fall (October and November)</td>
<td>8</td>
<td>19</td>
<td>9</td>
<td>4</td>
</tr>
<tr>
<td>Winter (December to March)</td>
<td>18</td>
<td>21</td>
<td>15</td>
<td>8</td>
</tr>
</tbody>
</table>


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
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

<table>
<thead>
<tr>
<th>Activities in the Region</th>
<th>SOUTH THOMPSON-Okanagan Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Non-Resident Total %</td>
</tr>
<tr>
<td>Sightseeing in the city/town</td>
<td>26</td>
</tr>
<tr>
<td>Visiting friends and relatives</td>
<td>16</td>
</tr>
<tr>
<td>Golfing</td>
<td>12</td>
</tr>
<tr>
<td>Zoos/natural displays/gardens</td>
<td>11</td>
</tr>
<tr>
<td>Shopping</td>
<td>11</td>
</tr>
<tr>
<td>Swimming</td>
<td>11</td>
</tr>
<tr>
<td>Wineries/farm tours</td>
<td>11</td>
</tr>
<tr>
<td>Went to beach</td>
<td>11</td>
</tr>
<tr>
<td>Amusement or theme park</td>
<td>10</td>
</tr>
<tr>
<td>Casual walking</td>
<td>10</td>
</tr>
</tbody>
</table>


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 2001\(^{11}\); 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.

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


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

<table>
<thead>
<tr>
<th>Traditional Products &amp; Recreational Activities</th>
<th>Emerging Products &amp; Recreational Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Alpine skiing</td>
<td>• Agri-tourism, particularly wine tourism</td>
</tr>
<tr>
<td>• Cross country skiing</td>
<td>• Cycle touring</td>
</tr>
<tr>
<td>• Snowmobiling</td>
<td>• Health &amp; spa tourism</td>
</tr>
<tr>
<td>• Freshwater fishing</td>
<td>• Conventions &amp; meetings</td>
</tr>
<tr>
<td>• Camping</td>
<td>• Cultural tourism and First Nations tourism</td>
</tr>
<tr>
<td>• Lake activities</td>
<td>• Cuisine tourism</td>
</tr>
<tr>
<td>• Hiking</td>
<td>• Museums</td>
</tr>
<tr>
<td>• Golfing</td>
<td>• Nature Appreciation</td>
</tr>
</tbody>
</table>

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 area. 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 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 subheadings:

---

14 The “Central Okanagan” includes the Central Okanagan Regional District.
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

**Destinations 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
Central Okanagan Crown Land
Tourism and Commercial Recreation Opportunities Study [DRAFT]
February 2003
Appendices

- 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 flies 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

<table>
<thead>
<tr>
<th>Potential Market</th>
<th>Resort/Lodge Categories</th>
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<th></th>
<th></th>
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<tr>
<td></td>
<td>Existing Lodges</td>
<td>Niche Lodge</td>
<td>Crystal Mtn. Res.</td>
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<td>CORD Residents</td>
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<td>*</td>
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<td>Lower Mainland</td>
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<tr>
<td>Alberta</td>
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<td>♦</td>
<td></td>
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<tr>
<td>Regional US</td>
<td>♦</td>
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<td></td>
</tr>
<tr>
<td>Other</td>
<td>♦</td>
<td>♦</td>
<td>♦</td>
<td></td>
</tr>
</tbody>
</table>

**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

<table>
<thead>
<tr>
<th>Activity/Product Linkages</th>
<th>Resort/Lodge Categories</th>
<th></th>
<th></th>
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<td>Existing Lodges</td>
<td>Niche Lodge</td>
<td>Crystal Mtn. Res.</td>
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<td>Freshwater fishing</td>
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<td>♦</td>
<td></td>
</tr>
<tr>
<td>Cycle touring &amp; mountain biking</td>
<td>♦</td>
<td>♦</td>
<td>♦</td>
<td></td>
</tr>
<tr>
<td>Ski touring</td>
<td>♦</td>
<td>♦</td>
<td>♦</td>
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<td>Snowmobiling</td>
<td>♦</td>
<td>♦</td>
<td>♦</td>
<td></td>
</tr>
<tr>
<td>Snowshoeing/Dog Sledding</td>
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<td></td>
<td></td>
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<tr>
<td><strong>Within the Okanagan</strong></td>
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<td></td>
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<tr>
<td>Agri-tourism – wineries &amp; related festivals</td>
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<td>♦</td>
<td>♦</td>
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<tr>
<td>Cuisine tourism</td>
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<td>♦</td>
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<td></td>
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<tr>
<td>Pre /post conferences/spousal tours</td>
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<td>♦</td>
<td>♦</td>
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<td>Health / spa tourism</td>
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<td>Cultural tourism</td>
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<tr>
<td>Golf</td>
<td>♦</td>
<td>♦</td>
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</tbody>
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**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

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<th>PROJ_NAME</th>
<th>Central Okanagan Regional District TOS</th>
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</tr>
<tr>
<td>ORG_NAME</td>
<td>Ministry of Sustainable Resource Management</td>
</tr>
<tr>
<td>ORG_NAME</td>
<td>Grant Thornton LLP</td>
</tr>
<tr>
<td>MAPPER</td>
<td>Jennifer Nichol (Project Manager)</td>
</tr>
<tr>
<td>YEAR_SURV</td>
<td>2002</td>
</tr>
<tr>
<td>DATE_REC</td>
<td>02-28-2003</td>
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<tr>
<td>RECOR_NAME</td>
<td>Leah Smith (Timberline)</td>
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</table>

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

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

tfl_cord_meta.txt / tfl_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

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tftp_cord_meta.txt / tftp_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
tftp_cord

### 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

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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)
Central Okanagan Crown Land
Tourism and Commercial Recreation Opportunities Study [DRAFT]
February 2003
Appendices

PROJECTION         Albers Equal Area Conic, NAD 83
PRODUCTION         February 2003
DATABASE                     See report Central Okanagan Crown Land Tourism and Commercial
Recreation Study

Metadata Plots

Commercial Recreation Map

FILE:   comrec_map_meta.txt
PURPOSE:   To provide information regarding comrec.hp2 (Commercial Recreation Tenures)
DESCRIPTION:   Crown Land Commercial Tenures 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

--------------------------------------------------------------------------------
COMMERICAL RECREATION DATA SOURCES:
-----------------------------------------------------------------
Coverage:  comrec_data
Description: Crown land approved commercial recreation tenures
Source:       Water and Lands BC Inc.
Date:         Data received June 25, 2002
Note:

Coverage:  tenure_appl
Description: Crown land pending commercial recreation tenures
Source:       Polygons digitized by Timberline from file maps
Date:         July, 2002
Note:         Locations approximate; source maps varying scales

Coverage:  t_np_tenure
Description: Non-profit community tenures
Source:       Provided by Ministry of Sustainable Resource Management
Date:         Data received August 20, 2002
Note:         community_rec_tenures_cord.shp converted to coverage

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 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 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 MSRM  
Date: Data received March 19, 2002  
Note: park.shp converted to coverage  

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

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

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

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

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

Coverage: t_non_crwn
Description: Private Land, Crown Land, Indian Reserves
Source: Provided by MSRM
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 MSRM
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 MSRM  
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 RFIIs 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 spreadsheet 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

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

### 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

<table>
<thead>
<tr>
<th>ACTIVITY CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>B01</td>
<td>beach activities</td>
</tr>
<tr>
<td>B02</td>
<td>boating (non-motorized)</td>
</tr>
<tr>
<td>B03</td>
<td>canoeing</td>
</tr>
<tr>
<td>B07</td>
<td>sailing</td>
</tr>
<tr>
<td>B11</td>
<td>swimming/bathing</td>
</tr>
<tr>
<td>D00</td>
<td>general snow sports</td>
</tr>
<tr>
<td>D01</td>
<td>cross-country skiing</td>
</tr>
<tr>
<td>D03</td>
<td>downhill skiing</td>
</tr>
<tr>
<td>D05</td>
<td>ski touring</td>
</tr>
<tr>
<td>D06</td>
<td>sledding/tobogganing</td>
</tr>
<tr>
<td>E02</td>
<td>canyoning</td>
</tr>
<tr>
<td>F01</td>
<td>sport fishing</td>
</tr>
<tr>
<td>F02</td>
<td>ice fishing</td>
</tr>
<tr>
<td>I01</td>
<td>hiking</td>
</tr>
<tr>
<td>I02</td>
<td>mountain biking</td>
</tr>
<tr>
<td>I03</td>
<td>horseback riding</td>
</tr>
<tr>
<td>Q01</td>
<td>fish run viewing</td>
</tr>
<tr>
<td>Q02</td>
<td>photography, drawing, painting</td>
</tr>
<tr>
<td>Q04</td>
<td>bird watching</td>
</tr>
<tr>
<td>Q05</td>
<td>view cultural/historic feature</td>
</tr>
<tr>
<td>Q08</td>
<td>scenic viewing</td>
</tr>
<tr>
<td>Q09</td>
<td>wildlife viewing</td>
</tr>
<tr>
<td>R03</td>
<td>rock climbing</td>
</tr>
<tr>
<td>K01</td>
<td>cabin/hut use</td>
</tr>
<tr>
<td>K02</td>
<td>cottaging</td>
</tr>
<tr>
<td>K03</td>
<td>picnicking</td>
</tr>
<tr>
<td>K04</td>
<td>camping</td>
</tr>
<tr>
<td>M00</td>
<td>motorized lane activity, general</td>
</tr>
<tr>
<td>M02</td>
<td>trail bike riding</td>
</tr>
<tr>
<td>M03</td>
<td>4x4 driving</td>
</tr>
<tr>
<td>M05</td>
<td>snowmobiling</td>
</tr>
<tr>
<td>M08</td>
<td>boating (motorized)</td>
</tr>
<tr>
<td>M10</td>
<td>water skiing</td>
</tr>
<tr>
<td>N01</td>
<td>nature study</td>
</tr>
<tr>
<td>N02</td>
<td>photography, drawing, painting</td>
</tr>
<tr>
<td>Q03</td>
<td>bird watching</td>
</tr>
<tr>
<td>Q06</td>
<td>scenic viewing</td>
</tr>
<tr>
<td>Q07</td>
<td>wildlife viewing</td>
</tr>
</tbody>
</table>

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 relatively 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

13. Typical data record for a polygon from the existing MoF Recreation Features Inventory
Appendix M      Bibliography and Digital Data Sources
**Hard Copy References**


Tourism British Columbia, 2002/03-2004/05. *Three-Year Service Plan Highlights.* Victoria, BC.


**Internet Sites**

http://bentwork.com/distance_calculator
www.canada tourism.com
www.bcadventure.com
www.bccstats.gov.bc.ca
www.britishcolumbia.com
www.britishcolumbiatours.com
www.edccord.com
www.kanada.com
www.kelownachamber.org
www.intermeet.trave.com
www.lakecountrychamber.org
www.sellingkelowna.com/kelowna.info/climate.htm
www.statcan.com
www.statcan.ca/start.htm
www.strategis.ic.gc.ca
www.tbc.gov.bc.ca/tourismhome.html
www.travelcanada.com
www.travel.bc.ca
www.world-tourism.org
www.wttc.org