



# VALUE OF TOURISM REPORT

REGIONAL DISTRICT OF BULKLEY-NECHAKO

FINAL - JULY 28, 2017



July 28, 2017

Corrine Swenson  
Regional District of Bulkley-Nechako  
Regional Economic Development Department  
37 3<sup>rd</sup> Avenue, PO Box 820  
Burns Lake, British Columbia V0J 1E0

Dear Ms. Swenson:

Please find enclosed the Final Value of Tourism Report for the Regional District of Bulkley-Nechako. It was a pleasure working with you and the Committee to develop this report and we look forward to hearing about your successes in the coming years.

If you have any questions or require clarification on the attached report please feel free to contact me at 780-266-7888.

Sincerely,



Justin Rousseau, Managing Director  
Expedition Management Consulting Ltd.

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# EXECUTIVE SUMMARY

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## Project Overview

Expedition Management Consulting Ltd. was commissioned in July of 2016 to implement Destination BC's (DBC) Value of Tourism Model for the Regional District of Bulkley-Nechako (RDBN) and its partner municipalities, including the Districts of Fort St. James, Houston and Vanderhoof; Town of Smithers; Villages of Burns Lake, Fraser Lake, Granisle and Telkwa. The main objective of the project was to identify the value of tourism in the RDBN and within each of the partner municipalities, in order to support future tourism planning, development and marketing. The project included extensive primary research in the form of an accommodation providers survey, in addition to secondary research activities to support the study.

## Benefits of Tourism

Tourism is an important industry in British Columbia that provides both economic and social benefits. According to the Province of British Columbia, the tourism industry is one of the largest and fastest growing sectors of the provincial economy. In 2015, the tourism industry in British Columbia:<sup>1</sup>

- Generated **\$15.7 billion** in revenue.
- Resulted in a **\$7.4 billion** direct contribution to British Columbia's GDP.
- Supported **18,938 tourism-related businesses** in British Columbia.
- Employed **127,700 people**.
- Generated **\$4.5 billion** in total tourism wages and salaries (with an average compensation of \$34,000).
- Generated **\$1.1 billion** in provincial taxes.

Tourism also has the potential to provide compelling social benefits for communities, as well. While the benefits are multiple and varied, tourism can provide the following social benefits:

- *A source of community pride* – Celebrating local culture and sharing it with the world can be a significant source of pride for communities, individuals and cultures.
- *Enhanced community engagement* – Tourism can provide opportunities for individuals within the community to become engaged through business, volunteerism, event/activity execution and interpretation of local culture.
- *Enhancements to the quality of life for residents* – Communities that embrace tourism can often justify enhancements to infrastructure, events and activities well beyond what could be achieved without a stable source of external revenue flowing into the community. Local community members benefit from enhanced amenities.

## Tourism-Related Planning

The RDBN and municipalities within the region recognize the potential that tourism has to add value to their local economies and communities.<sup>2</sup> As such, the municipalities and other local and regional tourism stakeholders have invested in plans and policies that impact its development. Collectively, these plans and their implementation shape the Bulkley-Nechako region as a tourism destination.

### Tourism Planning Context in the Regional District of Bulkley-Nechako



## The Value of Tourism in the RDBN

Value of Tourism Output Reports were generated by DBC for the region as a whole and for the communities of Smithers/Telkwa (combined), Vanderhoof, Burns Lake and Granisle. The results are for the year 2015. A summary of these reports is provided below.

### Visitation and Annual Direct Visitor Expenditures by Municipality (2015)

Community	Overall Visitation	Annual Direct Visitor Expenditures
Regional District of Bulkley-Nechako	250,400	\$58,680,000
Smithers/Telkwa	124,100	\$28,730,000
Vanderhoof	35,300	\$10,220,000
Burns Lake	30,000	\$6,360,000
Granisle	5,900	\$1,420,000

Source: Destination British Columbia

\*Output reports could not be generated for the Districts of Houston and Fort St. James and Village of Fraser Lake because they did not achieve the minimum response criteria that the Value of Tourism Model requires. However, the data that was collected from these communities was used to develop the regional output report.

### Municipal Taxes Generated by Accommodations

The taxes generated by tourism businesses is an important factor when considering the value of tourism in a given area. In 2016, \$809,378 was collected by six Municipalities in the study area from accommodation businesses. This total is broken down by Municipality in the chart below.

### Municipal Taxes Collected from Accommodations by Municipality (2016)

Municipality*	Taxes Collected
Regional District of Bulkley-Nechako Electoral Areas (A – G)	\$162,816
Town of Smithers	\$376,308
District of Vanderhoof	\$103,003
District of Fort St. James	\$86,689
Village of Burns Lake	\$54,149
Village of Fraser Lake	\$26,413
<b>Total Taxes Collected</b>	<b>\$809,378</b>

Source: Regional District of Bulkley-Nechako

\*Data not made available by Houston, Telkwa and Granisle.

## Conclusion

This document quantifies the value of tourism in the Regional District of Bulkley-Nechako, based on Destination BC's Value of Tourism Model, and describes the tourism-related planning that currently exists. The research enclosed in this report is ready to be used as a benchmark and leverage point to continue to grow the tourism industry in the region. With this document in hand, the RDBN and its municipal partners have a powerful tool to support future tourism planning, development and marketing.







01

INTRODUCTION

# 01 INTRODUCTION

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The Regional District of Bulkley-Nechako (RDBN) has exceptional natural assets and unique attractions that offer travellers the chance to create truly memorable experiences. With natural attractions like Babine Lake, Big River Country, Hudson Bay Mountain, Boer Mountain and numerous Provincial and local parks, the entire region is a hub of outdoor recreational and adventure tourism opportunities that encourage the Fully Independent Traveler market to “stay and play.” The vast network of freshwater lakes and rivers, and the extensive backcountry, also makes for world-class fishing and hunting experiences. In addition to outdoor/adventure tourism, the region offers a wide variety of attractive tourism products and services, such as delectable culinary experiences, sports tourism, concerts and events, and some of the best wildlife viewing available anywhere in the world.<sup>3</sup> The RDBN and its partner municipalities are strategically located along Highway 16, a major touring route in Northern BC and gateway to the Yukon and Alaska.



## Project Objective

The objective of this project is to identify the value of tourism in the RDBN and within each of the partner municipalities, in order to support future tourism planning, development and marketing.

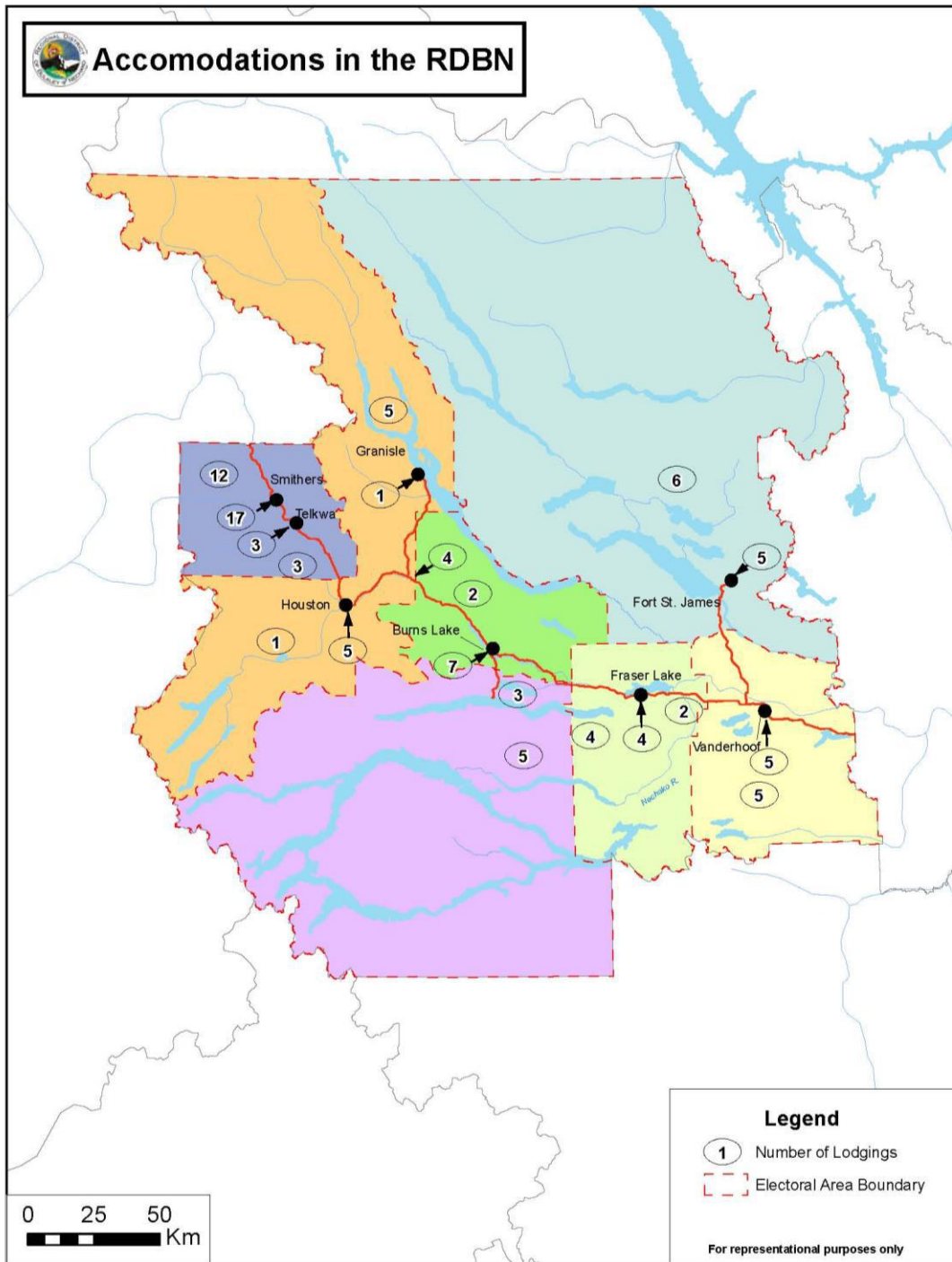
## Partners

The RDBN worked collaboratively with its regional partners to develop this report. Partners included the Districts of Fort St. James, Houston and Vanderhoof; Town of Smithers; Villages of Burns Lake, Fraser Lake, Granisle and Telkwa. In addition to funding provided by the partners, this project was supported by grants through Destination British Columbia and Nechako-Kitimaat Development Fund Society.



## Study Area

The Regional District of Bulkley-Nechako is located in northern British Columbia and covers an area of over 73,000 km<sup>2</sup>. The regional district includes seven electoral areas, as well as the municipalities of Smithers, Telkwa, Houston, Granisle, Burns Lake, Fraser Lake, Fort St. James and Vanderhoof.



## Project Team Members

The Regional Tourism Working Group (the Committee) was established for the purpose of providing input and direction to the project. Below is a list of Committee representatives:

Regional Tourism Working Group	
Organization	Representatives
Regional District of Bulkley-Nechako	Corrine Swenson, Deneve Vanderwolf
District of Houston	Maureen Czirfusz
District of Fort St. James	Kevin Crook
District of Vanderhoof	Thomas Clement
Village of Burns Lake	Val Anderson
Village of Granisle	Emily Kaehn, Sharon Smith
Village of Fraser Lake	Rod Holland, Dave Christie
Village of Telkwa	Edward Quinlan
Tourism Smithers	Gladys Atrill
Northern British Columbia Tourism	Clint Fraser
Consultant Team	
Expedition Management Consulting Ltd.	Justin Rousseau, Maxwell Harrison

## Project Process

The Value of Tourism project had five, interconnected phases. The phases of the process are described below. For a detailed description of the research methodology, see Section 4 – Research Methodology.





02

**BENEFITS OF TOURISM**

## 02 BENEFITS OF TOURISM

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There are many economic and social benefits to further investing in the tourism sector. This section provides a brief overview of the tourism industry and the various benefits it can bring to communities.

*“Tourism is an important industry for British Columbia and is poised to continue to grow... there is enormous potential.”*

### The Tourism Industry

The tourism industry in BC is comprised of many different stakeholders including tourism businesses, suppliers, product sectors, communities, associations, destination marketing organizations and federal, provincial, and municipal governments. Each one of these stakeholders has a role to play in helping BC become a stronger competitor in the global marketplace.<sup>4</sup> As stated in British Columbia’s Tourism Strategy *Gaining the Edge*, “Tourism is an important industry for British Columbia and is poised to continue to grow... there is enormous potential.”<sup>5</sup>



### Economic Benefits

According to the Province of British Columbia, the tourism industry is one of the largest and fastest growing sectors of the provincial economy. Provincial statistics show a growing tourism industry with total tourism revenue increasing year-over-year. There has also been growth in the number of tourism related businesses and tourism employment.<sup>6</sup> In 2015, the tourism industry in British Columbia:<sup>7</sup>

- Generated **\$15.7 billion** in revenue.
- Resulted in a **\$7.4 billion** direct contribution to British Columbia’s GDP.
- Supported **18,938 tourism-related businesses** in British Columbia.
- Employed **127,700 people**.
- Generated **\$4.5 billion** in total tourism wages and salaries (with an average compensation of \$34,000).
- Generated **\$1.1 billion** in provincial taxes.



The tourism industry can also have significant economic benefits for local communities. For example, tourism brings visitor dollars into communities. This is “new” money that then circulates throughout the local economy; multiplying its benefit. Additionally, tourism can expose communities to potential investors and home owners. In some cases, tourists enjoy their visit so much that they choose to stay. Tourism can also positively impact other sectors of local economies and encourage business retention.<sup>8</sup>

Tourism has the potential to provide numerous entry-level employment opportunities and also highly paid positions in management functions. Tourism businesses also make major investments in tourism infrastructure (e.g. accommodations, ski-hills, resorts, etc.) which often has far-reaching benefits for local economies.<sup>9</sup>

## Social Benefits

Tourism has the potential to provide compelling social benefits for communities, as well. While the benefits are multiple and varied, tourism can provide the following social benefits:

- *A source of community pride* – Celebrating local culture and sharing it with the world can be a significant source of pride for communities, individuals and cultures.
- *Enhanced community engagement* – Tourism can provide opportunities for individuals within the community to become engaged through business, volunteerism, event/activity execution and interpretation of local culture.
- *Enhancements to the quality of life for residents* – Communities that embrace tourism can often justify enhancements to infrastructure, events and activities well beyond what could be achieved without a stable source of external revenue flowing into the community. Local community members benefit from enhanced amenities.



The tourism industry is also capable of contributing to the preservation and revitalization of built and natural environments. When a destination’s unique characteristics (e.g. untouched wilderness, wildlife, authentic history) are leveraged as tourism products, they acquire an enhanced value that goes beyond just the economic considerations. Travellers experience an emotional connection to the places they visit, while (simultaneously) residents find a new-found significance for things that they may have taken for granted before. The addition of such values provides the impetus to further protect significant community and environmental assets and, in some cases, enhance them. A great example of these benefits in action can be witnessed at Barkerville Historic Town and Park (see right).<sup>10</sup>



*Barkerville Historic Town and Park offers an authentic, heritage experience to visitors in the North Caribou. In 2009, this attraction generated \$11.8 million in total economic activity and supported 120 FTE worth of employment.*

Good places to visit are also often good places to live. By embracing the tourism industry and being inviting to visitors, the Regional District of Bulkley-Nechako can further enhance the benefits they receive from tourism beyond the economic sphere alone.

## Precedence

The tourism industry is providing a wealth of benefits to communities and regions throughout British Columbia. There are a host of examples that demonstrate the power of tourism to produce positive outcomes in communities. Figure 1 outlines the economic impact tourism has had on several destinations in British Columbia.

Figure 1. Economic Impact of Tourism in British Columbia Communities

Region/Community	Positive Outcomes
Bridge River Valley, BC	<ul style="list-style-type: none"> <li>• Annual direct visitor expenditures of \$2.4 million in 2013<sup>11</sup></li> <li>• Total visitation of 25,000 in 2013</li> </ul>
District of Lillooet, BC	<ul style="list-style-type: none"> <li>• Annual direct visitor expenditures of \$5.7 million in 2009<sup>12</sup></li> <li>• Annual direct visitor expenditures of \$5.3 million in 2010</li> <li>• Total visitation of 50,800 in 2009</li> <li>• Total visitation of 47,900 in 2010</li> </ul>
South Peace Region, BC	<ul style="list-style-type: none"> <li>• Annual direct visitor expenditures of \$91.6 million in 2008<sup>13</sup></li> <li>• Total visitation of 227,800 in 2008</li> </ul>
Dawson Creek, BC*	<ul style="list-style-type: none"> <li>• Annual direct visitor expenditures of \$54.9 million in 2008</li> <li>• Total visitation of 146,000 in 2008</li> </ul>
Quadra Island, BC	<ul style="list-style-type: none"> <li>• Annual direct visitor expenditures of \$12.4 million in 2008<sup>14</sup></li> <li>• Total visitation of 84,800 in 2008</li> </ul>

\*The positive outcomes identified for Dawson Creek, BC are included in the South Peace Region, BC outcomes.





# 03

## TOURISM PLANNING CONTEXT

## 03 TOURISM PLANNING CONTEXT

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### Organizations Impacting Tourism

Within the region there are a number of organizations that have a direct impact on tourism development. A brief overview of each of these organizations is provided below, in addition to a description of their role in tourism development.

#### Regional District of Bulkley-Nechako

The RDBN fills a niche role that is complimentary to both local tourism activities and those of larger tourism entities (e.g. Northern BC Tourism, Destination BC). While the RDBN does not wish to take a lead role in tourism, the organization recognizes that there are some advantages to be gained through the implementation of regional tourism initiatives, and is willing to take a lead role on a project specific basis.<sup>15</sup> Specifically, the RDBN supports tourism development through initiatives laid out in its 2010 Tourism Plan (see Figure 2, pg. 19).

#### Local Municipal Governments

The municipal governments in the region play a leadership role in tourism development in their jurisdictions. Through Council and administration, they set plans and policies shaping tourism, set and enforce by-laws impacting residents, visitors and business owners, and invest in the implementation of economic development plans and initiatives (including tourism). Additionally, some of the municipalities operate and maintain visitor information centres, which are an important piece of the region's tourism infrastructure.

#### Northern BC Tourism

Northern BC Tourism is a stakeholder based, not-for-profit society that is governed by a private sector board of directors. This organization represents the business and community tourism interests within the Northern British Columbia tourism region. Northern BC Tourism develops, coordinates and delivers tourism marketing programs on behalf of its stakeholders, while also working closely with travel media, and assisting tour operators and travel influencers with familiarization tours and itinerary planning.

#### BC Parks

BC Parks is responsible for the designation, management and conservation of a system of provincial parks, recreation areas, ecological reserves, conservancies and protected areas throughout the province.<sup>16</sup> Many provincial parks are significant tourism assets in the region, as they attract visitors and often provide campgrounds for them to stay.

#### Tourism Smithers

Tourism Smithers is the destination marketing organization for the Town of Smithers. This organization is led by the Tourism Advisory Committee, and works in partnership with tourism stakeholders, the Smithers District Chamber of Commerce and neighbouring DMOs to deliver tourism marketing initiatives and promote the Town of Smithers to potential visitors.

### **Destination British Columbia**

Destination British Columbia (DBC) is the province's lead tourism marketing and destination development organization. Operating as a Crown corporation, the organization is governed by a 9-member industry led-board of directors. DBC works collaboratively with tourism stakeholders across the province to coordinate tourism marketing activities at the international, provincial, regional and local levels, and to support regions, communities and Aboriginal people in developing or expanding tourism experiences, businesses and jobs.<sup>17</sup> DBC is responsible for promoting the province to the world as a preferred travel destination, in order to ensure the continued growth and prosperity of BC's tourism industry. Key outcomes of DBC's activities include increased revenues and employment throughout BC, and to increase the economic benefits for all British Columbians.

### **Recreation Sites and Trails BC**

Recreation Sites and Trails BC is a provincial program that exists to provide safe, quality recreation opportunities for the public by developing, maintaining and managing a network of sites and trails across BC.<sup>18</sup> The program manages BC's trails and recreation sites through a combination of service contracts and partnership agreements with public and private sector organizations. Recreation sites and trails are vital pieces of tourism infrastructure, particularly in rural communities.

### **Recreation Organizations**

Community-led recreation organizations often have a direct impact on tourism development in the RDBN. Mountain bike associations, ski clubs, and many others play an integral role in developing local tourism infrastructure. These groups also advocate for their activity, and in some cases, deliver tourism experiences directly to visitors.

### **Chambers of Commerce**

Chambers of Commerce represent the interests of businesses in their community. These organizations provide support to businesses by offering workshops and training for entrepreneurs, running programs to increase local economic activity, setting up networking opportunities, and attracting business into their communities. Some Chambers of Commerce in the RDBN also manage visitor information centres and tourism websites for their communities.

### **Local Businesses**

Local businesses in communities across the RDBN provide key visitor services to tourists. These services include things such as tour operation, food and beverage, accommodations, fuel, transportation and shopping. Local businesses are a vital component of complete visitor experiences and can support further tourism development.

## Tourism-Related Planning

The RDBN and municipalities within the region recognize the potential that tourism has to add value to their local economies and communities.<sup>19</sup> As such, the municipalities and other local and regional tourism stakeholders have invested in plans and policies that impact its development. Collectively, these plans and their implementation shape the Bulkley-Nechako region as a tourism destination. The following is an overview of the direct linkages these plans have to tourism. For an expanded discussion regarding tourism-related planning, see Appendix A.

### Tourism Planning Context in the Regional District of Bulkley-Nechako



## Regional District of Bulkley-Nechako

Planning Documents	Linkage(s) to Tourism
Regional Economic Development Action Plan (2014)	<ul style="list-style-type: none"> <li>Continue to develop regional tourism experiences as a tourism product around a common theme such as Aboriginal culture, sports or outdoor activities.</li> <li>Tourism was identified by the majority of interviewees as an important area for further development.</li> <li>Growth in the tourism industry was seen as a way to diversify from the primarily resource-based economic drivers.</li> <li>Tourism was seen as a potential “game changer” for the area, promoting small business and the cultural heritage of RDBN, and generating large spin-off effects for the region.</li> <li>As the tourism sector grows, so too can small businesses that support the visitor experience (e.g. restaurants, hotels, gift shops, etc.).</li> </ul>
Tourism Plan (2010)	<ul style="list-style-type: none"> <li>Defined the RDBN’s role in supporting and improving the regional tourism economy.</li> <li>Identified 12 initiatives to support and improve the regional tourism economy.</li> </ul>

## Town of Smithers

Planning Documents	Linkage(s) to Tourism
Five-Year Strategic Tourism Plan (2017 – 2021)	<ul style="list-style-type: none"> <li>The goal of the plan is to grow the tourism industry and increase visitation to Smithers by 20% by 2022.</li> <li>19 targets were set across the four focus areas (Marketing, Destination Management and Product Experience, Meetings and Conventions, and Visitor Services).</li> <li>21 key actions were developed within the four focus areas to achieve the targets and the plan’s goal.</li> </ul>
Official Community Plan (2014)	<ul style="list-style-type: none"> <li>Tourism was identified as an economic asset that provides year-round benefits for local businesses and community residents.</li> <li>Future development of recreation, sport and trails infrastructure can also be used to enhance tourism opportunities.</li> <li>Agritourism was identified as an avenue to support the diversification of the local agriculture economy.</li> </ul>
Smithers Telkwa Rural Official Community Plan (2014)	<ul style="list-style-type: none"> <li>Tourism is recognized as an increasingly important component of the local economy, and is recognized as a significant contributor.</li> <li>B&amp;B’s and agritourism operations should be supported.</li> <li>Outdoor recreation opportunities should be improved and protected in a way that enhances the tourism potential of the area.</li> </ul>

## District of Houston

Planning Documents	Linkage(s) to Tourism
Economic Development Strategy (2014)	<ul style="list-style-type: none"> <li>The tourism sector was rated highly as an opportunity for economic development (64.4% of survey respondents identified the sector as a key economic driver).</li> <li>A strategic objective of the strategy is to expand tourism opportunities.</li> <li>Four action items were developed to help promote growth in the local tourism sector.</li> </ul>
Official Community Plan (2010)	<ul style="list-style-type: none"> <li>Identified four action items to help diversify the local economy through tourism development.</li> </ul>
Houston, Topley, Granisle Rural Official Community Plan (2011)	<ul style="list-style-type: none"> <li>Outdoor recreation opportunities should be improved and protected in a way that enhances the tourism potential of the area.</li> <li>A goal for Topley Landing is to improve local tourism facilities and services, and to limit the negative impacts associated with seasonal tourism peaks.</li> </ul>

### District of Vanderhoof

Planning Documents	Linkage(s) to Tourism
Official Community Plan (2014)	<ul style="list-style-type: none"> <li>• Tourism is recognized as one of the top four main economic contributors.</li> <li>• An objective is to increase the number of visitors to the community.</li> <li>• The District's parks and recreation infrastructure can also serve to further tourism development.</li> <li>• Community arts and culture organizations are also important components for tourism and should be supported.</li> </ul>

### District of Fort St. James

Planning Documents	Linkage(s) to Tourism
Tourism Plan (2012)	<ul style="list-style-type: none"> <li>• Objective is to create economic opportunity (year round employment, businesses) for Fort St. James' community members through increased visitation, longer stays and more spending in the community and in the region.</li> <li>• 11 tactics were developed around tourism product development, marketing and sales.</li> </ul>
Economic Development Plan (2015)	<ul style="list-style-type: none"> <li>• Fort St. James was recognized as an ideal outdoor setting for sports and recreation activities, in addition to having a rich First Nations history and culture.</li> <li>• The Plan included four actions that would support the local tourism sector.</li> </ul>
Master Trails Plan (2013)	<ul style="list-style-type: none"> <li>• The trail system is recognized for creating opportunities for outdoor recreation-based tourism, and as having the potential to increase visitation to Fort St. James.</li> <li>• The plan prioritized four improvements related to tourism.</li> </ul>
Official Community Plan (2010)	<ul style="list-style-type: none"> <li>• Tourism was identified as a major commercial opportunity and an important avenue of economic diversification.</li> <li>• Six objectives were set that support the tourism potential of the community.</li> </ul>
Fort St. James Rural Official Community Plan (2010)	<ul style="list-style-type: none"> <li>• Tourism is recognized as a significant contributor to the local economy.</li> <li>• Outdoor recreation opportunities should be improved in a way that enhances the tourism potential of the area.</li> </ul>

### Village of Burns Lake

Planning Documents	Linkage(s) to Tourism
Community Tourism Plan (2012)	<ul style="list-style-type: none"> <li>• Established a vision for tourism in the community.</li> <li>• The overarching goal of the plan is to increase tourism to the area in order to diversify the local economy and achieve greater economic prosperity in a sustainable manner.</li> <li>• Five tourism objectives were established, along with 32 strategies and tactics over the short, medium and long term in order to grow the tourism sector.</li> </ul>
Economic Development Strategic Plan (2016)	<ul style="list-style-type: none"> <li>• Tourism sector development was identified as a priority area of the plan.</li> <li>• Three strategic tourism actions were developed to improve the efficiency of the delivery of tourism services, and improve local services for tourists.</li> </ul>
Our Burns Lake Sustainability Plan (2013)	<ul style="list-style-type: none"> <li>• Tourism was identified as an avenue to achieve the priority of diversifying the local economy to create more jobs.</li> <li>• The plan contained six desired outcome statements that relate to tourism.</li> </ul>
Official Community Plan (2007)	<ul style="list-style-type: none"> <li>• Recognizes the community's unique natural setting and the recreation and tourism opportunities related specifically to outdoor tourism.</li> <li>• Tourism was identified as a key opportunity to further diversify the local economy.</li> <li>• The plan lays out three objectives and seven policies that contribute to further tourism development.</li> </ul>
Burns Lake Rural and Francois Lake (North Shore) Official Community Plan (2009)	<ul style="list-style-type: none"> <li>• Tourism is recognized as a significant contributor to the local economy.</li> <li>• Outdoor recreation opportunities should be improved in a way that enhances the tourism potential of the area.</li> </ul>

## Village of Fraser Lake

Planning Documents	Linkage(s) to Tourism
Economic Development Strategy (2016)	<ul style="list-style-type: none"> <li>Expanding the tourism sector was identified as an opportunity for the community, with 48% of respondents to the online survey indicating they would like to see an expansion of tourism and hospitality businesses.</li> <li>Eight initiatives related to tourism were developed that will assist Fraser Lake to create a strong and sustainable economy.</li> </ul>
Official Community Plan (2008)	<ul style="list-style-type: none"> <li>Recognizes the value of the natural setting of Fraser Lake and the recreational and tourism opportunities that this asset provides.</li> <li>An objective of the plan is to encourage waterfront development that improves access and usage opportunities with a focus on tourism.</li> </ul>
Endako, Fraser Lake, Fort Fraser Rural Official Community Plan (2008)	<ul style="list-style-type: none"> <li>Tourism is recognized as an increasingly important component of the local economy, and is recognized as a significant contributor.</li> <li>Outdoor recreation opportunities should be improved in a way that enhances the tourism potential of the area.</li> <li>Encourage BC Parks to develop a foreshore park along the south side of the Stellako River in order to increase tourism in the area.</li> </ul>

## Village of Telkwa

Planning Documents	Linkage(s) to Tourism
Official Community Plan (2011)	<ul style="list-style-type: none"> <li>Recognizes excellent opportunities for economic growth through tourism.</li> <li>Sets an objective for tourism development.</li> <li>Contains 12 policies that directly support and four policies that indirectly support the achievement of the tourism objective.</li> </ul>
Smithers Telkwa Rural Official Community Plan (2014)	<ul style="list-style-type: none"> <li>Tourism is recognized as an increasingly important component of the local economy, and is recognized as a significant contributor.</li> <li>B&amp;B's and agritourism operations should be supported.</li> <li>Outdoor recreation opportunities should be improved and protected in a way that enhances the tourism potential of the area.</li> </ul>

## Village of Granisle

Planning Documents	Linkage(s) to Tourism
Official Community Plan (2007)	<ul style="list-style-type: none"> <li>The plan recognizes that tourism will play a significant role in the Village's future economic development.</li> <li>Five of the top nine strategic priorities were directly related to tourism.</li> </ul>
Economic Development Strategy (2016)	<ul style="list-style-type: none"> <li>Lays out two strategic priorities and 10 action items to further develop the local tourism industry.</li> </ul>
Sustainability Plan (2015)	<ul style="list-style-type: none"> <li>Identifies outdoor recreation and tourism as the largest part of the local economy.</li> <li>Establishes five actions to support tourism development.</li> </ul>



# 04

## RESEARCH METHODOLOGY



## 04 RESEARCH METHODOLOGY

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This section describes the research methodology that was undertaken to develop the value of tourism outputs for the region and its communities.

### The Value of Tourism Model

Having defensible estimates of tourism's contribution to a community is central to developing an informed planning approach, strengthening the support of community stakeholders and local government, and encouraging an appreciation of tourism's economic development potential. In 2005, Destination British Columbia introduced the Community Tourism Foundations® (CTF) Program, which was designed to assist communities in developing their tourism potential. The Value of Tourism Model provides a structured, consistent approach to estimate the volume and value of tourism. The objective of the model is:

"To provide a conservative and credible estimate of visitor volume  
and direct tourism expenditures within a community."

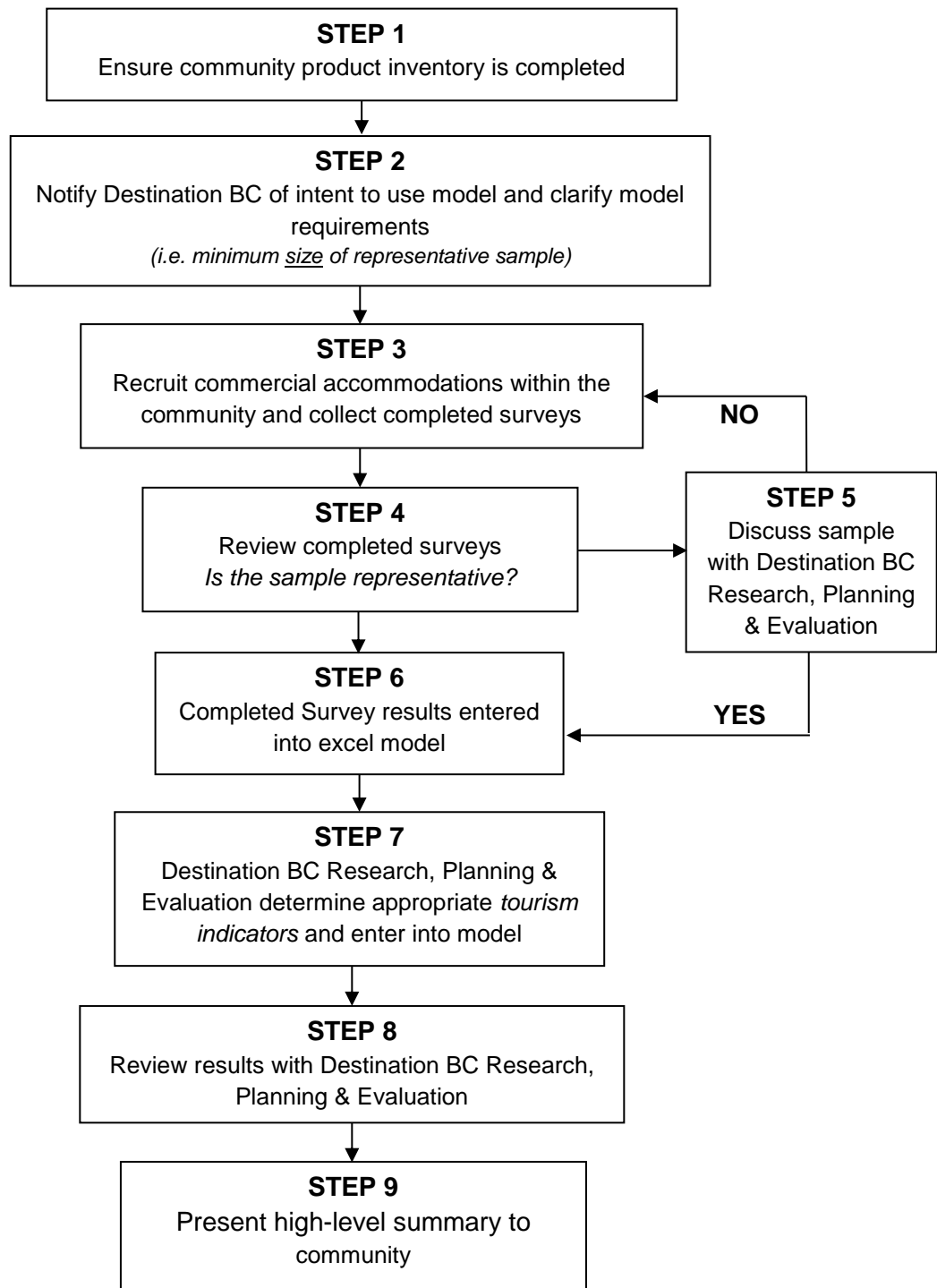
The core data collection component of the model is an accommodation survey to gather the most recent annual performance data from commercial accommodation operators (including campgrounds and RV parks). This information is then combined with local, regional, provincial and national tourism indicators to provide an estimate of the total number of visitors (overnight, day and visiting friends & relatives) and their expenditures in the community.<sup>20</sup> The Value of Tourism Model can be applied to communities throughout the Province and has been successfully implemented on numerous occasions.

In order to implement the model successfully, a community must meet the following criteria:

1. At least a 50% response rate from the total room/site base.
2. At least a 50% response rate from each accommodation type.
3. Collect a representative sample within each accommodation type.

The Destination British Columbia Value of Tourism survey methodology follows the path outlined on the flowchart in Figure 2.

Figure 2. Value of Tourism Methodology Flowchart



## Survey Implementation and Data Gathering

The process began with an inventory of all commercial accommodations in the study area by the RDBN and its partner municipalities. This inventory was inclusive of hotels, motels, RV parks, campgrounds, bed and breakfasts, resorts, and hunting and fishing lodges. Once this inventory was finalized, all of the accommodations were initially contacted through email in order to introduce the project and describe the survey that they were asked to complete. Drafts of the survey materials were then developed using templates provided by DBC. The surveys asked accommodation providers to record their monthly visitation information for the previous calendar year (in this case 2015). The monthly information that was asked of them included the following:

- Number of Rooms Available
- Total Occupied Room Nights
- Average Achieved Daily Room Rate
- Average Length of Stay
- Average Party Size
- Split Between Business and Leisure Guests

Separate surveys were then developed for Fixed Roof Accommodations (e.g. hotels, motels, B&B's, resorts and lodges) and for RV Parks and Campgrounds. If an accommodation provider had both a fixed roof accommodation and RV or campground sites on their property, then they were asked to fill out both surveys. Additionally, both surveys were available as a Microsoft Word file and as a Microsoft Excel file. The Excel file had formulas built into it that helped respondents fill in the survey. The Excel file was offered because some survey questions required meticulous calculation that some respondents might have had difficulty completing (e.g. Average Achieved Daily Room Rate). Respondents were asked to complete only one version of the surveys (i.e. Word or Excel). Accommodation providers were also provided with a "How to Fill Out the Survey" document, in case they had questions while completing the survey.

Once the survey materials were finalized, a survey commencement email was sent out to all of the accommodations in the inventory. This email contained details on how to fill out the survey, what to do if they required assistance, how to submit the survey, what the deadlines were, and that their business information would be kept in the strictest confidence. Also included in the email were both surveys (in Word and Excel versions) and the How to Fill Out the Survey document. If requested, these materials were also provided through mail.

After the commencement email was sent out to the accommodations, multiple follow up calls were made and reminder emails sent out to each accommodation. A purposeful calling script was also developed to guide discussions and increase the likelihood of respondents participating in the survey. A detailed call log was maintained throughout the survey collection period that recorded every interaction with and attempt to contact accommodation providers. Unresponsive accommodations were contacted multiple times by the consultant team, the RDBN and partner organizations.

Throughout the survey collection period, email and phone support was provided to accommodation providers that required assistance filling out the survey. In addition, an opportunity to meet in-person to go through the survey with respondents was provided. Every response to the survey was reviewed in detail by the consultant team for completeness. If any discrepancies or errors/omissions were found, follow up calls/emails were made to the respondent to gather the correct information.

Please see Appendix B for copies of the emails, surveys and other documents that were sent out to accommodation providers during the course of this project.

The taxes generated from accommodation businesses in the study area was another piece of information that was included as part of this project. The RDBN collected this information by asking municipalities in the study area to share the amount of taxes they collected in 2015 from commercial accommodations.

## Project Timeline Extension and Challenges with Data Collection

The original project timeline was scheduled to conclude in November of 2016. This timeline was extended due to a number of factors. For example, the original duration of the accommodation providers survey was set by the Committee to begin in August and conclude by September 23, 2016, however this is the high season for most operators, which caused the response to the survey to be lower than desired. Therefore, an extension was provided. Another contributing factor was that the accommodation providers in the study area were spread over a large geographic region and many are based out of rural or remote locations, which made contacting them a challenge. Gathering responses from the numerous fishing lodges/resorts in the study area also proved challenging. Their high season runs from September – November each year, and extensions to the deadline were requested by many of these operators. To ensure that fishing lodges/resorts were given a fair chance to respond to the survey, the deadline for them to submit a response was extended to December 23, 2016. The timeline was further extended because of an enhancement made to the DBC Value of Tourism Model. The decision was made to use new base indicators to ensure more accurate projections. This extended the timeline to receive the final output reports for each community to June 14, 2017.

## Data Analysis

Once the deadline for receiving responses had passed, the data was thoroughly reviewed by the consultant team and then shared with DBC so that they could also review the data for completeness. Formatting adjustments were made to the data based on DBC's recommendations, in addition to more follow-up calls with accommodations to gather any data points that may still have been missing. Once the final data set was produced, the consultant team provided it to DBC. With the final data set in hand, DBC inputted it into the Value of Tourism Model and developed output reports.



05

**THE VALUE OF TOURISM IN THE RDBN**

## 05 THE VALUE OF TOURISM IN THE REGIONAL DISTRICT OF BULKLEY-NECHAKO

This section contains the results from the Value of Tourism Model, in addition to the extra findings from the survey regarding taxes generated and employment.

### Value of Tourism Output Results

Value of Tourism Output Reports were generated by DBC for the region as a whole and for four communities in the study area. A summary of the output results is provided below in Figure 3.

Figure 3. Summary of Output Reports (2015)

Community	Overall Visitation	Annual Direct Visitor Expenditures
Regional District of Bulkley-Nechako	250,400	\$58,680,000
Smithers/Telkwa	124,100	\$28,730,000
Vanderhoof	35,300	\$10,220,000
Burns Lake	30,000	\$6,360,000
Granisle	5,900	\$1,420,000

Source: Destination British Columbia

\*Output reports could not be generated for the Districts of Houston and Fort St. James and Village of Fraser Lake because they did not achieve the minimum response criteria that the Value of Tourism Model requires. However, the data that was collected from these communities was used to develop the regional output report.

NOTE: The figures presented below in the output charts provide estimates of the size and value of the local tourism industry. They are prepared largely from information collected from tourism businesses within the community and are limited to the quality of that data collection. These estimates are only applicable to the time period and community for which the data was collected for (2015). These values should not be applied to other years or communities.

## Regional District of Bulkley-Nechako

### Estimates of Visitors (2015)

Type of Visitor	Volume of Visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	70,800
Business	39,100
RV & Campground	23,000
Total Visitors in Commercial Accommodations	132,900
Visiting Friends & Relatives (VFR)	20,200
Day Visitors	97,300
Overall Visitation	250,400

Source: Destination British Columbia

### Estimates of Direct Visitor Expenditures (2015)

Type of Visitor	Number of Visitors	Average Length of Stay (days)	Average Total Spend (per visitor per trip)	Totals
Leisure (commercial accommodation)	93,800	3.2	\$210	\$20,030,000
Business	39,100	5.4	\$630	\$24,550,000
Visiting Friends & Relatives (VFR)	20,200	4.5	\$210	\$4,170,000
Day Visitors	97,300		\$100	\$9,930,000
Annual Direct Visitor Expenditures				\$58,680,000

Source: Destination British Columbia

**Notes and Assumptions (from DBC):**

- Eight communities were approached to participate in the Value of Tourism Model Program. Seven communities provided accommodation data, however, just four met the guiding principles of eligibility. An output was generated for each eligible community (note: Telkwa was combined with Smithers).
- Ideally, a total output would be generated solely from those communities that meet the guiding principles for eligibility. However, to provide estimates for the entire region, accommodation data collected from all communities has been included. While not ideal, because not equally represented, all accommodation data, regardless of meeting the guiding principles, has been included to generate the output for the Regional District of Bulkley-Nechako.
- RV/Campgrounds, and to a lesser extent Fixed Roof, are underrepresented in the output.
- The guiding principles of 50% accommodation type and 50% room count for each community were not met by some of the communities. Output should be interpreted with caution.
- All ratios are based on the Northern BC tourism region (rather than provincial indicators) as determined by Statistics Canada's Travel Survey of Residents of Canada and the International Traveller Survey. These ratios are applied to the data collected. As such, all information in the output is specific to the Regional District.
- The exception being: Average length of stay and average total spend per visitor per trip for Visiting Friends and Family and Day Visitors. This information is reported at the tourism regional level.



## Town of Smithers/Telkwa

### Estimates of Visitors (2015)

Type of Visitor	Volume of Visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	43,400
Business	15,300
RV & Campground	9,400
Total Visitors in Commercial Accommodations	68,100
Visiting Friends & Relatives (VFR)	7,700
Day Visitors	48,300
Overall Visitation	124,100

Source: Destination British Columbia

### Estimates of Direct Visitor Expenditures (2015)

Type of Visitor	Number of Visitors	Average Length of Stay (days)	Average Total Spend (per visitor per trip)	Totals
Leisure (commercial accommodation)	52,800	3.1	\$270	\$14,060,000
Business	15,300	3.7	\$530	\$8,150,000
Visiting Friends & Relatives (VFR)	7,700	4.5	\$210	\$1,590,000
Day Visitors	48,300		\$100	\$4,930,000
Annual Direct Visitor Expenditures				\$28,730,000

Source: Destination British Columbia

### Notes and Assumptions (from DBC):

- The guiding principles of 50% accommodation type and 50% room count were not fully met largely as a result of lack of participation from RV/Campgrounds in the survey. The output does not provide a full picture of RV/Campgrounds. Output should be interpreted with caution.
- The Smithers and Telkwa communities are combined at the request of the RDBN. However, it should be noted that only one accommodation from Telkwa is included from the data collected. All other survey completions are from Smithers and Electoral Area A.
- All ratios are based on the Northern BC tourism region (rather than provincial indicators) as determined by Statistics Canada's Travel Survey of Residents of Canada and the International Traveller Survey. These ratios are applied to the data collected by each community. As such, all information in the output is Smithers/Telkwa specific. The exception being: Average length of stay and average total spend per visitor per trip for Visiting Friends and Family and Day Visitors. This information is reported at the tourism regional level. Community specific information is not available.

## District of Vanderhoof

### Estimates of Visitors (2015)

Type of Visitor	Volume of Visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	9,700
Business	5,000
RV & Campground	1,800
Total Visitors in Commercial Accommodations	16,500
Visiting Friends & Relatives (VFR)	5,100
Day Visitors	13,700
Overall Visitation	35,300

Source: Destination British Columbia

### Estimates of Direct Visitor Expenditures (2015)

Type of Visitor	Number of Visitors	Average Length of Stay (days)	Average Total Spend (per visitor per trip)	Totals
Leisure (commercial accommodation)	11,500	3.2	\$160	\$1,810,000
Business	5,000	6.8	\$1,190	\$5,960,000
Visiting Friends & Relatives (VFR)	5,100	4.5	\$210	\$1,050,000
Day Visitors	13,700		\$100	\$1,400,000
Annual Direct Visitor Expenditures				\$10,220,000

Source: Destination British Columbia

### Notes and Assumptions (from DBC):

- The guiding principles of 50% accommodation type and 50% room count were fully met.
- All ratios are based on the Northern BC tourism region (rather than provincial indicators) as determined by Statistics Canada's Travel Survey of Residents of Canada and the International Traveller Survey. These ratios are applied to the data collected by each community. As such, all information in the output is Vanderhoof specific. The exception being: Average length of stay and average total spend per visitor per trip for Visiting Friends and Family and Day Visitors. This information is reported at the tourism regional level. Community specific information is not available.

## Village of Burns Lake

### Estimates of Visitors (2015)

Type of Visitor	Volume of Visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	7,100
Business	9,200
Total Visitors in Commercial Accommodations	16,300
Visiting Friends & Relatives (VFR)	2,000
Day Visitors	11,700
Overall Visitation	30,000

Source: Destination British Columbia

### Estimates of Direct Visitor Expenditures (2015)

Type of Visitor	Number of Visitors	Average Length of Stay (days)	Average Total Spend (per visitor per trip)	Totals
Leisure (commercial accommodation)	7,100	1.9	\$130	\$930,000
Business	9,200	7.0	\$420	\$3,830,000
Visiting Friends & Relatives (VFR)	2,000	4.5	\$210	\$410,000
Day Visitors	11,700		\$100	\$1,190,000
Annual Direct Visitor Expenditures				\$6,360,000

Source: Destination British Columbia

### Notes and Assumptions (from DBC):

- The guiding principles of 50% accommodation type and 50% room count were not fully met. Output should be interpreted with caution.
- The Value of Tourism Model Output is based solely on the Fixed Roof and Other Fixed Roof accommodations. RV/Campground visitors are not captured in this model. Visitation and expenditures for Burns Lake would be higher if RV/Campgrounds were included. Note that this output is only a sub-set of visitation as a result.
- All ratios are based on the Northern BC tourism region (rather than provincial indicators) as determined by Statistics Canada's Travel Survey of Residents of Canada and the International Traveller Survey. These ratios are applied to the data collected by each community. As such, all information in the output is Burns Lake specific. The exception being: Average length of stay and average total spend per visitor per trip for Visiting Friends and Family and Day Visitors. This information is reported at the tourism regional level. Community specific information is not available.

## Village of Granisle

### Estimates of Visitors (2015)

Type of Visitor	Volume of Visitors
Fixed Roof (Hotels, Motels, B&B)	
Leisure	600
Business	500
RV & Campground	2,200
Total Visitors in Commercial Accommodations	3,300
Visiting Friends & Relatives (VFR)	300
Day Visitors	2,300
Overall Visitation	5,900

Source: Destination British Columbia

### Estimates of Direct Visitor Expenditures (2015)

Type of Visitor	Number of Visitors	Average Length of Stay (days)	Average Total Spend (per visitor per trip)	Totals
Leisure (commercial accommodation)	2,800	5.2	\$270	\$750,000
Business	500	6.0	\$760	\$380,000
Visiting Friends & Relatives (VFR)	300	4.5	\$210	\$60,000
Day Visitors	2,300		\$100	\$230,000
Annual Direct Visitor Expenditures				\$1,420,000

Source: Destination British Columbia

### Notes and Assumptions (from DBC):

- The guiding principles of 50% accommodation type and 50% room count were not fully met. Output should be interpreted with caution.
- The output is based on the accommodation type available for each community. In the case of Granisle, this output is based on Other Fixed Roof and RV/Campground accommodations. There are no Hotels/Motels/Inns in Granisle to capture.
- All ratios are based on the Northern BC tourism region (rather than provincial indicators) as determined by Statistics Canada's Travel Survey of Residents of Canada and the International Traveller Survey. These ratios are applied to the data collected by each community. As such, all information in the output is Granisle specific. The exception being: Average length of stay and average total spend per visitor per trip for Visiting Friends and Family and Day Visitors. This information is reported at the tourism regional level. Community specific information is not available.

## Municipal Taxes Generated by Accommodations

In 2016, \$809,378 in municipal taxes was collected by six Municipalities in the study area from accommodation businesses. This total is broken down by Municipality in Figure 4 below.

Figure 4. Municipal Taxes Generated by Accommodations Business (2016)

Municipality*	Taxes Collected
Regional District of Bulkley-Nechako Electoral Areas (A – G)	\$162,816
Town of Smithers	\$376,308
District of Vanderhoof	\$103,003
District of Fort St. James	\$86,689
Village of Burns Lake	\$54,149
Village of Fraser Lake	\$26,413
<b>Total Taxes Collected</b>	<b>\$809,378</b>

Source: Regional District of Bulkley-Nechako

\*Data not made available by Houston, Telkwa and Granisle.

## Employment Generated by Tourism

The data collected from accommodations regarding employment information was not sufficient to generate reliable estimates of total employment generated by tourism. The data has been provided in its raw form in Appendix C.



# 06

## CONCLUSION

## 06 CONCLUSION

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This document quantifies the value of tourism in the Regional District of Bulkley-Nechako, based on Destination BC's Value of Tourism Model, and describes the tourism-related planning that currently exists. The research enclosed in this report is ready to be used as a benchmark and leverage point to continue to grow the tourism industry in the region. With this document in hand, the RDBN and its municipal partners have a useful tool to support future tourism planning, development and marketing.



# APPENDICES



## APPENDIX A: Tourism-Related Planning (expanded version)

### Regional District of Bulkley-Nechako

#### Regional Economic Development Action Plan, 2014

This 2014 study served to update the previous Economic Development Action Plan (2009). A review of current strategies and an analysis of the economic base was completed. The study considered multiple economic



sectors, including tourism and recommends that the Regional Economic Development Department should, “continue to develop regional tourism experiences as a tourism product around a common theme such as Aboriginal culture, sports or outdoor activities.”<sup>21</sup>

This conclusion was supported by the research undertaken during the development of the plan. Relevant points include:

- There is already a lot to attract tourists (including great wildlife, fishing and hunting, skiing, Aboriginal culture, and other outdoor experiences).
- Tourism was identified by the majority of interviewees as an important area for further development.
- Growth in the tourism industry was seen as a way to diversify from the primarily resource-based economic drivers.
- Tourism was seen as a potential “game changer” for the area, promoting small business and the cultural heritage of RDBN, and generating large spin-off effects for the region.
- As the tourism sector grows, so too can small businesses that support the visitor experience (e.g. restaurants, hotels, gift shops, etc.).
- Tourism was seen as a way to encourage more “staycations” by local residents to keep more money and people in the communities.

#### Tourism Plan, 2010

In 2010, a Tourism Plan was developed for the Regional District of Bulkley-Nechako. The plan was intended to define a role for the RDBN in supporting and improving the regional tourism economy, as well as identifying ways to enhance community level initiatives.<sup>22</sup> Through the planning process a number of tourism initiatives were recommended to be undertaken by the RDBN, and some have since been completed or are currently underway (see Figure 5).

Figure 5. RDBN Tourism Initiatives and Status

Tourism Initiative	Status
- Value of Tourism Study	Complete
- Signage Program	Currently underway
- Encourage stakeholder participate in existing government programs coordinated by NBCTA.	Ongoing
- Encourage stakeholder participation in Cooperative Advertising program.	Ongoing
- Develop a tourism web portal	Complete
- Develop an image bank	Complete
- Develop circle tours or travel itinerary	Complete
- Promote sport and recreational opportunities	Complete
- Promote heritage and culture tourism	Complete
- Hosting BC and sports tournaments promotion	Complete
- Tradeshow presence	Ongoing
- WorldHost® Training	Deferred

## Town of Smithers

### Five-Year Strategic Tourism Plan (2017 – 2021)

The Town of Smithers Five-Year Strategic Tourism Plan (2017 – 2021) identifies the strategic direction for tourism development in the municipality, and puts forward key actions that will support the further development of the successful local tourism industry.

The vision for the plan is, *"The Town of Smithers, through Tourism Smithers, will be recognized as an exceptional destination offering excellent tourism opportunities in outdoor recreation, arts and culture, festivals and events, First Nations experience and food and lodging. Tourism will have a prominent and recognized role in our local and regional economy."*<sup>23</sup> The overarching goals of the plan are to **grow the tourism industry and increase visitation to Smithers by 20% by 2022.**



In order to achieve these goals, objectives were set for each of the identified key areas (Marketing, Destination Management and Product Experience, Meetings and Conventions, and Visitor Services), in addition to 19 specific targets within the focus areas. 21 key actions were also developed across the four areas that will contribute to the achievement of the strategic tourism plan's goals. Examples of these key actions are provided next.

### 1. Marketing

- Expand the video and image bank.
- Purchase targeted, high impact, on brand advertising.
- Review and develop Smithers and Area Visitors Guide

### 2. Destination Management and Product Experience

- Cooperate with Northern BC Tourism on Destination Management and Product Experience for Smithers.

### 3. Meetings and Conventions

- Work with community organizations to promote Smithers as an ideal event host location for small niche or specialized conferences and meetings.
- Attend relevant provincial meetings and conventions as part of professional development and advocacy role.

### 4. Visitor Services

- Seek out and implement innovative ways of meeting visitor needs, such as adapting the latest technology to boost the positive profile of Smithers.
- Support local stakeholders to be well-informed, proud ambassadors of the community.
- Maintain the Riverside Campground so it remains a popular site with existing and high occupancy rates.

## Official Community Plan, 2014

The Official Community Plan (OCP) is the principal planning document for the Town of Smithers.<sup>24</sup> It provides guidance on future growth and development within the municipality. Tourism was identified as an economic asset that provides year-round benefits for local businesses and community residents. In terms of future development, tourism is included under the Recreation objective, which is, "To provide recreation opportunities for community members of all ages and abilities and to enhance tourism opportunities."<sup>25</sup> Within the Recreation objective, there are a number of policies that will work to improve the quality of life for residents, as well as tourism assets, through the improvement of sport, recreation and trails infrastructure. Additionally, agritourism was identified as an avenue to support the diversification of the local agriculture economy.

## Smithers Telkwa Rural Official Community Plan, 2014

This plan applies to Electoral Area "A" (Smithers/Telkwa Rural) and is adopted by the Board of Directors of the RDBN.<sup>26</sup> The plan contains goals, objectives and policies that will guide land use planning and development decisions in the Plan area. Tourism is becoming an increasingly important component of the local economy, and is already recognized as a significant contributor. The objectives and policies of the plan related to tourism includes support for B&B's and agritourism operations, and to improve and protect outdoor recreational opportunities that enhance the livability and tourism potential of the area.

## District of Houston

### Economic Development Strategy, 2014

Strong support for tourism as an economic driver was found through the development of this strategy. The tourism sector was rated highly as an opportunity for economic development in Houston, with 64.4% of survey respondents identifying the sector as a key economic driver.<sup>27</sup> As such, one of the five strategic objectives that emerged from the development of this strategy was to Expand Tourism Opportunities. Within this objective there were four recommended actions to help promote growth in the local tourism sector:



1. Develop a Houston Tourism Plan
2. Pursue funding for expanding Steelhead Park
3. Inventory tradeshows for participation
4. Implement action items from the RDBN Tourism Plan

### Official Community Plan, 2010

The District of Houston OCP identified a number of strategies and actions related to tourism development that would help to diversify the local economy. These included the implementation of the RDBN Tourism Plan (2010) recommendations as they apply to the District of Houston, the development of a list of potential value added businesses, joint First Nation ventures and tourism projects within and adjacent to the community, and the implementation of the Bulkley-Nechako Economic Development Action Plan (2009) priorities as they apply to the District of Houston (including the Tourism Initiative).<sup>28</sup>

### Houston, Topley, Granisle Rural Official Community Plan, 2011

This plan applies to Electoral Area "G" (Houston Rural) and is adopted by the Board of Directors of the RDBN.<sup>29</sup> The plan contains goals, objectives and policies which describe the form and character of existing and proposed land uses in the Plan area. One objective of the plan is to improve outdoor recreational opportunities that enhance the livability and tourism potential of the area. A goal specifically for Topley Landing is to improve local tourism facilities and services, and to limit the negative impacts associated with seasonal tourism peaks.

## District of Vanderhoof

### Official Community Plan, 2014

The District of Vanderhoof OCP recognizes tourism as one of the top four main economic contributors to the local economy.<sup>30</sup> The plan contains five objectives and seven policies that relate to tourism development. They are as follows:



### Objectives:

- To increase the number of visitors to the community through promotion and marketing of local events.
- To increase awareness of the community's amenities and attractions.
- To continue to develop park land and recreational facilities to serve both residents and visitors.
- To work towards the long-term beautification of the community.
- To enhance the community's heritage by encouraging the preservation and restoration of historical sites and buildings.

### Policies:

- Support local events and promote attractions through signage and marketing.
- Develop incentives for tourist accommodation development.
- Actively seek development of an interpretive centre as an educational centre and an attraction for tourists.
- Continue to attract events to the community.
- Allow commercial developments along the highway corridor that serve travelling customers and tourist markets.
- Encourage property owners to make the downtown core commercial area more visually appealing to visitors and residents.
- Promote local arts and cultural activities through appropriate means.

## District of Fort St. James

### Tourism Plan, 2012

This report was developed through Destination BC's Community Tourism Foundations® program. As part of the process, a Tourism Committee was formed to lead tourism planning and implementation. The working mandate of the Tourism Committee is, "to research and identify tourism trends; plan and execute effective marketing strategies; inventory and address specific infrastructure needed for successful growth of the tourism industry in our community."<sup>31</sup>

The Tourism Committee has established the following objective for the next five years related to the growth and development of Fort St. James tourism - *Create economic opportunity (year round employment, businesses) for Fort St. James' community members through increased visitation, longer stays and more spending in the community and in the region.*

To support the achievement of this objective, a number of tourism strategies and tactics were developed relating to tourism product development and tourism marketing and sales. Examples of these strategies and tactics are provided below.



### **Tourism Product Development Strategies:**

- Develop enhanced aboriginal cultural experiences at Fort St. James National Historic Site
- Continue to expand family friendly special events at the National Historic Site and tie these events in to other activities happening in town.
- Create a suite of Nation Lakes trip planning services.
- Expand content and programming of Music on the Mountain to create a “must-attend” event for the regional market.
- Create a WinterFest showcasing local snowmobiling, dogsledding, and skiing opportunities.

### **Tourism Marketing and Sales Strategies:**

- Undertake a branding review to confirm Fort St. James’ unique selling proposition.
- Continue to build partnerships with the Regional District, Northern BC Tourism Association, Destination BC and the Aboriginal Tourism Association of BC.
- Enhance Fort St. James web/social media presence.
- Utilize highway signage to promote upcoming and ongoing events in Fort St. James in order to convince travelers to turn off Highway 16.
- Secure editorial coverage in target market publications that showcase Fort St. James tourism experiences.
- Build relationships with inbound tour operators and international outbound operators for inclusion in tour itineraries.

### **Economic Development Plan, 2015**

The economic development plan for the District of Fort St. James was developed to identify opportunities around which to build capacity and diversify the economy. Through the process, a number of assets were identified that represent potential points of leverage for developing and diversifying the local economy through tourism. These assets include an annual base of 10,000 tourists who come to visit the National Heritage Site, an ideal outdoor setting for sports and recreation activities (with potential to grow the visitor base), popular camping sites at Paarens Beach and Sowchea Bay, and a rich First Nations history and culture. While there were no strategies directly related to tourism in the plan, many of the actions are applicable to the tourism sector. These actions include:

- Create a marketing package to promote the local economy of Fort St. James.
- Empower local businesses with information and connections to help them grow and develop.
- Build awareness within the local business community, including potential and budding entrepreneurs about funding available to finance all stages of business start-up, development, and growth.
- Strengthen linkages between local entrepreneurs and build their understanding about the strengths and competitive advantages of other operators.

### Master Trails Plan, 2013

The Master Trails Plan identifies the District of Fort St. James' trail system as an important community asset.<sup>32</sup> Among other benefits, the trail system is recognized for creating opportunities for outdoor recreation-based tourism, and as having the potential to increase visitation to Fort St. James. This plan prioritized a number of improvements, policies and programs for the trails infrastructure that related to tourism. These recommended improvements, policies and programs are as follows:

- Waterfront Pathway Extension to Spirit Square, which would connect the National Historic Site to the town, and be a tourist attraction.
- The extension of the sidewalk across Douglas Avenue Bridge, as a key pedestrian link between the residential area and the school and recreational areas south.
- Ash Street connection to Highway 27, as a popular route between the residential area and the Downtown
- Marketing initiatives to promote the trail amenities both locally and regionally.

### Official Community Plan, 2010

The Fort St. James Official Community Plan (2010) has identified tourism as a major commercial opportunity and an important avenue of economic diversification in Fort St. James.<sup>33</sup> The objectives and policies as outlined in the plan support the tourism potential of the community, while also ensuring the needs of local residents are considered. These objectives and policies are:

- To encourage the development of Fort St. James as a tourist destination and to support tourist commercial and highway commercial developments.
- To work with provincial tourism organizations to encourage and support tourism industries in Fort St. James.
- To encourage the beautification of the Commercial Core.
- To encourage landscaping and screening that presents an attractive appearance to motorists.
- To implement the action items listed within the Tourism Development Plan (2007) when feasible.
- To encourage the development of fine-dining restaurants, hotels and convention centres.

### Fort St. James Rural Official Community Plan, 2010

This plan applies to Electoral Area "C" (Fort St. James Rural) and is adopted by the Board of Directors of the RDBN.<sup>34</sup> The plan contains goals, objectives and policies which describe the form and character of existing and proposed land uses in the Plan area. Tourism is recognized as a significant contributor to the economy. As such, an objective of the plan is to improve outdoor recreational opportunities that enhance the livability and tourism potential of the area.

## Village of Burns Lake

### Community Tourism Plan, 2012

In 2012, the Village of Burns Lake and Lakes District underwent a tourism planning process with assistance from Destination BC and the NBCTA. The community's tourism vision was confirmed as, "*Our vision is to be part of a vibrant community that includes a desirable, healthy and affordable lifestyle. A family-oriented destination – A Place Where Visitors Want to Come Back! Through the spirit of inclusiveness, cooperation and collaboration all community members including local government contribute to this vision.*"<sup>35</sup> The overall goal of the plan is to increase tourism to the area in order to diversify the local economy and achieve greater economic prosperity in a sustainable manner. As stated in the plan, the following tourism objectives were established:

- To grow the tourism industry strategically as a way of diversifying the local economy and expanding the tax base, increasing the jobs and income available to residents while recognizing community values.
- To enhance destination development and appeal for visitors through the strategic use of regional, provincial, national and private infrastructure investments.
- As an integral element of industry growth, to foster business development that compliments and strengthens products and attractions of most appeal to visitor markets.
- To encourage tourism operators to consistently and strategically market the area to target markets by cooperation with the lead tourism organization and to leverage resources wherever possible.
- To sustain a tourism management function to ensure leadership, organizational capacity, funding and communications that support tourism stakeholders and the community in achieving the vision for tourism.

To aid in the achievement of these tourism objectives 32 strategies and tactics were developed. These are to be implemented in the short, medium and long term in order to grow the tourism sector in Burns Lake.

### Economic Development Strategic Plan, 2016

This strategic plan was developed to establish a clear direction and vision for economic development in the Burns Lake area. Among the four priorities listed in the plan, Tourism Sector Development was one of them. The goal for this priority is, "*Tourism is an important sector in the Lakes District economy.*"<sup>36</sup> The desired outcomes for Tourism Sector Development include:

- Tourism support is strategic, collaborative and appropriately funded.
- Establish the Lakes District as a known destination for diverse activities along Highway 16.
- Develop a vibrant and visible downtown community environment that is welcoming at all times.





These outcomes will be achieved through the implementation of strategic tourism actions that will improve the efficiency of the delivery of tourism services in Burns Lake, and improve local services for tourists and out of town visitors. These actions include:

- Establish a coordinated understanding of how tourism services are delivered in the community, which stakeholders are responsible for what tasks and determine where Economic Development support is required. This would include:
  - Website development and maintenance
  - Tourism product development
  - Marketing and Promotion
  - Aboriginal Tourism Development
- Develop an inventory of local events in the community and how many participants, volunteers and spectators travel from out of town to educate businesses on the economic value of these events.
- Educate and encourage local businesses to adopt shopping friendly hours which helps create vibrant streets and encourages travelers to stop.

### **Our Burns Lake Sustainability Plan, 2013**

The Integrated Community Sustainability Plan for the Village of Burns Lake included a priority to, “Diversify the local economy to create more jobs.”<sup>37</sup> Two of the key indicators supporting this priority was tourism businesses and visitor numbers. Looking ahead to the future, this plan outlined a number of Desired Outcome Statements (DOS) that describe what success and sustainability will look like in Burns Lake by the year 2040. The DOS that related to tourism are provided below:

- Burns Lake’s town centre is a thriving destination for locals and tourists alike.
- The downtown is vibrant with landscaping, beautification and public spaces, and it has a main street that locals are proud of and visitors want to explore.
- All residents and visitors have access to year-round recreational activities.
- Indoor and outdoor sport, culture and art events are held year-round.
- Trail linkages provide tourism and recreational opportunities, and connect prominent locations such as the lakefront, commercial village and surrounding hills and forest.
- Diverse and accessible recreational and sports opportunities are an essential quality of Burns Lake and play an important role in attracting visitors and new residents to the community.

### **Official Community Plan, 2007**

The Village of Burns Lake OCP recognizes the community’s unique natural setting and the recreation and tourism opportunities related specifically to outdoor tourism.<sup>38</sup> Tourism related services are an important source of employment within Burns Lake, and tourism was identified as one of two key opportunities to further diversify the local economy. The plan lays out the following objectives and policies related to tourism:

**Objectives:**

- Develop the Lakes District as a highly desirable outdoor tourism and lifestyle location, for which the Burns Lake waterfront area provides a focal point.
- Develop a parks and recreation plan that establishes a well-integrated and linked system of parks, trails and associated recreational facilities that serve a range of purposes, from active recreation, to passive enjoyment, to conservation, to tourism development along Burns Lake.
- Encourage the beautification of the Burns Lake waterfront area.

**Policies:**

- Support the development and marketing of a broad range of outdoor tourism products in the Lakes District.
- Ensure community facilities and services are managed to meet the needs of residents; and where appropriate, as an economic development strategy to promote tourism and growth.
- Continue to promote the heritage resources in the community as part of its economic and tourism development efforts.
- Promote the image of Burns Lake as the heart of the Lakes District with its exceptional lake resources and accessible beach, making it more easily apparent to first time visitors travelling on Highway 16
- Establish a Burns Lake waterfront site as a central hub of waterfront and tourism activities consistent with community recreational, cultural and educational interests.
- Support efforts to build a Burns lake waterfront boardwalk which links with existing trails and new waterfront attractions.
- Support the community forest tenure to provide forestry employment while maintaining sensitive non-timber values and developing recreational, educational and tourism opportunities.

**Burns Lake Rural and Francois Lake (North Shore) Official Community Plan, 2009**

This plan applies to Electoral Area “B” and a portion of Electoral Area “E” (North Shore of Francois Lake), and is adopted by the Board of Directors of the RDBN.<sup>39</sup> The plan contains goals, objectives and policies which describe the form and character of existing and proposed land uses in the Plan area. Tourism, along with ranching and government services, were recognized as significant contributors to the local economy. An objective of the plan is to improve outdoor recreational opportunities that enhance the livability and tourism potential of the area.

## Village of Fraser Lake

### Economic Development Strategy, 2016

The purpose of this Economic Development Strategy was to identify realistic and practical steps that can be taken to improve the future economic prospects for the residents, businesses and stakeholders of the Village of Fraser Lake. The vision for the strategy is, *"Fraser Lake is a vibrant, lakeside community with a diversified economy incorporating both traditional resource based activities and entrepreneurship capitalizing on new opportunities."*<sup>40</sup> An opportunity identified in the strategy was expanding the tourism sector in Fraser Lake. Nearly half (48%) of respondents to the online survey indicated that they would like to see an expansion of tourism and hospitality businesses (i.e. restaurants, accommodations and events, increased use of the lake).



A number of initiatives and specific strategies were developed that will assist Fraser Lake to create a strong and sustainable economy, and improve the community as a place to live and invest. The initiatives that relate to tourism are the following:

- Community-wide Beautification Program
- Waterfront Development
- Pre-development Planning for a Truck Stop
- Expanded Use of Relocated Visitor Centre
- First Impressions Program
- Website (tourism specific)
- Promote Community in Hotel
- Wayfinding Program

### Official Community Plan, 2008

The Village of Fraser Lake OCP recognizes the value of the natural setting of Fraser Lake and the recreational and tourism opportunities that this asset provides.<sup>41</sup> In recognition of this natural asset, an objective of the plan is to encourage waterfront development that improves access and usage opportunities with a focus on tourism and economic growth.

### Endako, Fraser Lake, Fort Fraser Rural Official Community Plan, 2008

This plan applies to Electoral Area "D" (Fraser Lake Rural), and is adopted by the Board of Directors of the RDBN.<sup>42</sup> The plan contains goals, objectives and policies which describe the form and character of existing and proposed land uses in the Plan area. Tourism, mining, cattle ranching, and the sawmill are the mainstays of the local economy, although tourism is increasingly becoming an important contributor to the area's economy. An objective of the plan is to improve outdoor recreational opportunities that enhance the livability and tourism potential of the area, while a policy of the plan is to encourage BC Parks to develop a foreshore park along the south side of the Stellako River in order to increase tourism in the area.

## Village of Telkwa

### Official Community Plan, 2011

The Village of Telkwa OCP recognizes excellent opportunities for economic growth through tourism. Telkwa's spectacular natural setting provides opportunities for adventure tourism, while the Village's unique heritage and character offers opportunity in the area of cultural heritage tourism.<sup>43</sup> The OCP set the following economic development objective for tourism, "*To identify strategies and actions that will assist in developing year round tourism opportunities.*" To support the achievement of this objective, 12 policies were developed, which include:



- Market community on the environmental features and amenities found within the area.
- Assist in creating local agri-tourism and eco-tourism opportunities.
- Designate areas in desirable locations to be used for tourism-based uses (i.e. viewscapes, access to trails, etc.).
- Encourage sustainable development of based tourism services, including food and beverage establishments, overnight accommodations and land and water based tour operators.
- Cooperate and partner with groups and agencies in the tourism, arts and recreation sectors to encourage and strengthen economic development and to support the "Gateway to Tyhee" initiative.
- Work in partnership with MOT to provide proper road access to backcountry amenities.
- Designate an area within the town boundary for short-term parking opportunities.
- Build on the steelhead fishing and the activities associated with this sport (i.e. boat cleaning, trailer storage, tackle-shop).
- Create a signage plan that highlights local attractions to encourage longer visitations to the area.
- Identify and create a space where local artisans could display arts and craft on a regular basis.
- Build upon themes associated with "rock, wood and water".
- Consider implementation of municipally subsidized Development Cost Charge (DCC) rates for new development within the new town centre to stimulate development and redevelopment of the area.

Policies from other OCP objectives also align with further tourism development. These policies are as follows.

- Encourage the development of a collaborative community-based tourism plan, including sub-sectors such as eco-tourism, all-season tourism, agri-tourism and education tourism.
- Ensure the continuation of small scale farms to encourage local small scale agricultural production and create viable farming operations through increased agritourism.
- Create a suitable zoning structure to accommodate residential-based tourism developments.
- Create a Telkwa Recreation coordinator position to encourage the expansion of services and potential recreation/tourism opportunities in the community.

## Village of Granisle

### Official Community Plan, 2007

In the Village of Granisle OCP, five of the top nine strategic priorities identified by Council were directly related to tourism (See list below). In terms of the community's goal for economic development, it was recognized that tourism will play a significant role in the Village's future economic development.<sup>44</sup>

In particular, the waterfront has the potential to develop into a mixed-use tourism-commercial/marine-commercial area with attendant parks and open space.



### Strategic Priorities Related to Tourism

1. Tourism – significant opportunity exists to increase revenue from tourism, to increase employment in Granisle and to attract and keep residents.
2. RV Parks – development of RV parks were noted as essential to cater to the travelling public, allowing visitors to stay longer in the area and bring business to the Village.
3. Granisle Connector Road – is has long been the vision of the community to have the connector road to Smithers upgraded, providing a convenient circle route for travellers.
4. Mammoth – tourist attraction, bring tourists to the Village, spin-off for other local attractions and businesses, promotion focus.
5. Arena and Curling Rink Promotion – facilities are an economic activity generator, enhances quality of life for residents, increase opportunity to bring visitors to the community through tournaments and bonspiels, trade shows; provides increased opportunity for fitness – in general enhances quality of life.

### Economic Development Strategy, 2016

The Village of Granisle Economic Development Strategy (2016) laid out strategic priorities and actions that build on local strengths, such as the community's beautiful natural surroundings and Babine Lake.<sup>45</sup> The strategic priorities and actions that relate to tourism development include the following:

## Strategic Priorities

1. Attract new residents of all ages.

## Actions

- Promote the community's natural surroundings, small town lifestyle and amenities; and coordinate efforts with local tourism marketing and with the RDBN's promotion strategy.
- Promote Granisle and area by developing branded signage, an official visitor guide, a Granisle Area Map Book, and digitizing the "Babine Lake" map.

2. Grow the local economy.

- Develop a comprehensive tourism strategy, linking all aspects and opportunities for recreation and tourism.
- Revitalize waterfront-lakefront tourism development.
- Support local, small business.
- Support tourist information centre.
- Conduct an assessment of potential uses of Crown Land within Village boundaries.
- Special events and equipment rentals for tourism.
- Repatriate the Woolly Mammoth remains from the national museum and build tourism marketing strategy on theme.
- Continue to beautify the community, especially the commercial area (mall).

## Sustainability Plan, 2015

The Sustainability Plan for the Village of Granisle (2015) identifies outdoor recreation and tourism as forming the largest part of the local economy.<sup>46</sup> As such, tourism development features prominently in the actions that the plan puts forward. These actions include:

- Promote the community's natural surroundings, small town lifestyle and amenities; and coordinate efforts with local tourism marketing and with the RDBN's promotion strategy.
- Develop a comprehensive tourism strategy, linking all aspects and opportunities for recreation and tourism.
- Conduct an assessment of potential uses of Crown Land within Village boundaries.
- Repatriate the Woolly Mammoth remains from the national museum and build tourism marketing strategy on theme.
- Continue to beautify the community, especially the commercial area (mall).

## APPENDIX B: Survey Implementation Materials



## The Value of Tourism in the RDBN Fixed Roof Accommodations Form

Please complete the following information on your property for all months of 2015 and return the completed form to:

Maxwell Harrison, Expedition Management Consulting Ltd.

Email: [Maxwell@expeditionconsulting.ca](mailto:Maxwell@expeditionconsulting.ca)

Mail: Apt 905 9808 103 ST NW, Edmonton, AB, T5K 2G4

The information provided will be kept CONFIDENTIAL and only used by Destination BC and EMC for this project. Data will only be reported in aggregate, meaning the performance of individual properties cannot be inferred from the data.

<b>Property Name</b>												
<b>Property Type</b>												
<b>All Guests</b>	<b>Jan-15</b>	<b>Feb-15</b>	<b>Mar-15</b>	<b>Apr-15</b>	<b>May-15</b>	<b>Jun-15</b>	<b>Jul-15</b>	<b>Aug-15</b>	<b>Sep-15</b>	<b>Oct-15</b>	<b>Nov-15</b>	<b>Dec-15</b>
Number of Available Rooms												
Total Occupied Room Nights												
Average Achieved Daily Rate												
<b>Business Guests</b>												
Total Occupied Room Nights												
Average Length of Stay												
Average Party Size												
<b>Leisure Guests</b>												
Total Occupied Room Nights												
Average Length of Stay												
Average Party Size												

Note: If your business includes **more than one** type of accommodation (e.g. Motel & RV sites), please complete a separate form for each "type" of accommodation.



Please provide information on the number of employees working in your establishment and their average hourly wage (before benefits).

	Number of Employees	Average Hourly Wage (Before Benefits)
Full-Time* Year Round (employed 12 months)		
Full-Time Seasonal** (employed 7 – 11 months)		
Full-Time Seasonal (employed 3 – 6 months)		
Full-Time Seasonal (employed 1 – 2 months)		
Part-Time*** Year Round (employed 12 months)		
Part-Time Seasonal (employed 7 – 11 months)		
Part-Time Seasonal (employed 3 – 6 months)		
Part-Time Seasonal (employed 1 – 2 months)		

**Employment Definitions:**

- \*Full-Time            An employee who works 30 hours or more per week.
- \*\*Seasonal            An employee who works for less than 12 months of the year.
- \*\*\*Part-Time        An employee who works less than 30 hours per week.

Please complete the following information on your property for all months of 2015 and return the completed form to:

Maxwell Harrison, Expedition Management Consulting Ltd.

Email: [Maxwell@expeditionconsulting.ca](mailto:Maxwell@expeditionconsulting.ca)

Mail: Apt 905 9808 103 ST NW, Edmonton, AB, T5K 2G4

The information provided will be kept CONFIDENTIAL and only used by Destination BC and EMC for this project. Data will only be reported in aggregate, meaning the performance of individual properties cannot be inferred from the data.

<b>Property Name</b>	
<b>Property Type</b>	

All Guests	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
Number of Available Sites												
Total Occupied Site Nights												
Average Length of Stay												
Average Party Size												
Hook Up Guests												
Number of Available Sites												
Total Occupied Site Nights												
Average Achieved Daily Rate												
Average Length of Stay												
Average Party Size												
Non-Hook Up Guests												
Number of Available Sites												
Total Occupied Site Nights												
Average Achieved Daily Rate												
Average Length of Stay												
Average Party Size												

Note: If your business includes **more than one** type of accommodation (e.g. Motel & RV sites), please complete a separate form for each "type" of accommodation.

Please provide information on the number of employees working in your establishment and their average hourly wage (before benefits).

	Number of Employees	Average Hourly Wage (Before Benefits)
Full-Time* Year Round (employed 12 months)		
Full-Time Seasonal** (employed 7 – 11 months)		
Full-Time Seasonal (employed 3 – 6 months)		
Full-Time Seasonal (employed 1 – 2 months)		
Part-Time*** Year Round (employed 12 months)		
Part-Time Seasonal (employed 7 – 11 months)		
Part-Time Seasonal (employed 3 – 6 months)		
Part-Time Seasonal (employed 1 – 2 months)		

**Employment Definitions:**

- \*Full-Time            An employee who works 30 hours or more per week.
- \*\*Seasonal            An employee who works for less than 12 months of the year.
- \*\*\*Part-Time        An employee who works less than 30 hours per week.

## Project Introduction E-mail

Dear Accommodation Provider:

The Regional District of Bulkley-Nechako and Destination BC are conducting a Regional Value of Tourism Study. This study will engage accommodation providers in the Bulkley-Nechako region in order to estimate the visitor volume and direct tourism expenditures within your region and local communities. The success of the project hinges upon gathering important information from accommodation providers. We request that you participate in this important project. The consultant team will be contacting you the week of August 15<sup>th</sup>, 2016 to provide you with further information.

## Why Participate?

**Increased Tourism Revenue for Your Business** - The goal of this project is to help make decisions that will support growth in tourism. This in turn will help you grow your business.

**You Will Receive a Copy of the Study** – The results of the study will provide you valuable information about your customers and the regional tourism industry. The study will be made available to all those who participate.

**\$100 Cash Offer** – \$100 cash will be made available to all those who submit the information by the deadline.

**\$1000 Cash Early Bird Draw** - Those that complete an electronic or mail submission by the deadline will be entered into a draw for \$1000 cash.

## What Will Be Asked of Me?

As a participating accommodation you will be requested to provide your information for 2015, including:

- Number of Rooms Available
- Total Occupied Room Nights;
- Average Achieved Daily Room Rate
- Average Length of Stay
- Average Party Size
- Split Between Business and Leisure Customers

## How Can I Submit?

There will be 3 methods to submit the information:

1. Electronic (preferred)
2. Mail
3. In-person

### **What if I Need Assistance?**

Some respondents may need assistance submitting their information. The consultants will provide assistance in the following ways (if required):

1. E-mail support
2. Phone support
3. In-person meeting

### **How Long Will It Take For Me to Participate?**

Some accommodation providers will be able to produce the information in a matter of minutes whereas others may take longer if the information is not readily available. The consultants will provide assistance with submission as required.

### **When Will I Need to Submit My Information?**

The consultants will be collecting information during August and September of 2016. Deadlines will be provided in a follow-up e-mail that will be sent to you from the consultants the week of August 15, 2016.

### **Who Will Be Collecting Information?**

Expedition Management Consulting Ltd. has been commissioned to collect the information and prepare the study. This company has an impeccable record in collecting and protecting confidential information.

### **Is My Information Confidential?**

Rest assured that your data will be kept in the strictest confidence by the consultants. No other business will have access to your data nor will Local Municipalities or the Regional District. Your information will be shared with Destination BC for input into the economic impact model and put into aggregate form with other operators' data to ensure anonymity.

Information provided by accommodation businesses to the consultants will:

- only be used for the purposes of estimating tourism contribution to the community;
- be aggregated with other operators' data to ensure anonymity;
- remain confidential and will not be released in any form that enables individual operators to be identified; and
- be submitted directly to the consultants.

### **What's Next?**

The consultant team will contact you by e-mail the week of August 15, 2016 with further details on the format for submission and deadlines.

## Survey Commencement E-mail

Dear Accommodation Provider:

By now, you have been contacted by a local representative about the upcoming Regional Value of Tourism Study. I am pleased to inform you that the Accommodation Providers Survey is now open! **Deadline for submissions is September 2, 2016.** Please see the headings below for more information on how to participate.

### Who Will Be Collecting Information?

Please allow me to introduce myself. I am Maxwell Harrison and I will be the main contact for the Accommodation Providers Survey. Having lived in Northwest British Columbia for 20 years, I am excited to be launching this important part of the study. By learning from local accommodation providers, such as yourself, we will gain a better understanding of the value of tourism in the Bulkley-Nechako region. This important information will assist you in growing tourism revenue for your business.

The company that I represent is Expedition Management Consulting Ltd. (EMC). We provide specialized tourism consulting services to communities, organizations and businesses. EMC has a solid reputation for professionalism and confidentiality.

The success of the project hinges upon gathering important information from you, therefore we want to work closely with you to ensure high quality data is obtained in a timely fashion.

### How to Participate

Attached to this email are five documents:

1. Accommodation Providers Survey 2016 for Fixed Roof Accommodations (Word version)
2. Accommodation Providers Survey 2016 for RV Parks and Campgrounds (Word version)
3. Accommodation Providers Survey 2016 for Fixed Roof Accommodations (Excel version)
4. Accommodation Providers Survey 2016 for RV Parks and Campgrounds (Excel version)
5. How to Fill out the Survey

Please fill out the appropriate survey for your accommodation type (e.g. Fixed Roof or RV Park and Campgrounds) and submit the completed survey(s) to Maxwell Harrison (contact information included on survey form). Please fill out either a Word version of the survey OR the Excel version.

### What to do if you Need Assistance Completing the Survey

Some respondents may need assistance submitting their information. EMC will provide assistance in the following ways:

- |                                    |   |
|------------------------------------|---|
| 1. E-mail support                  | Maxwell@expeditionconsulting.ca                   |
| 2. Phone support                   | 780-267-7898                                      |
| 3. In-person meeting (if required) | Meetings will be scheduled from September 12 - 16 |

Please feel free to contact me at the email and/or number above if you have any questions. I will get back to you as soon as possible.

## Submission Details

There are 3 methods to submit the completed survey(s):

- |                            |   |
|----------------------------|---|
| 1. Electronic (preferred)  | Maxwell@expeditionconsulting.ca                   |
| 2. Mail                    | Apt 905, 9808 103 ST NW, Edmonton, AB, T5K 2G4    |
| 3. In-person (if required) | Meetings will be scheduled from September 12 - 16 |

If you are unable to submit your survey response through email or mail, please contact me by September 2<sup>nd</sup> and I will work with you to schedule an in-person meeting so that you may submit your response.

## Submission Deadlines

The deadline to submit completed surveys (via email or mail) or to choose the in-person interview option is **September 2<sup>nd</sup> at 4:30pm.**

## Confidentiality

Rest assured that your data will be kept in the strictest confidence by EMC. No other business will have access to your data, nor will Local Municipalities or the Regional District. Your information will be shared with Destination BC for input into the economic impact model and put into aggregate form with other operators' data to ensure anonymity.

Information provided by accommodation businesses to EMC will:

- only be used for the purposes of estimating tourism's contribution to the community;
- be aggregated with other operators' data to ensure anonymity;
- remain confidential and will not be released in any form that enables individual operators to be identified.

Thank you for your consideration and I look forward to working with you on this important project.

Sincerely,

Maxwell

**Note:** Please do not "reply all" to this email. It has been sent to numerous addresses and they will be able to see your response if you do.

## APPENDIX C: Raw Employment Data

### Smithers/Telkwa

Employee Classification	Number of Employees	Average Wage (\$/hour)
Full-Time Year Round	42	\$17.39
Full-Time Seasonal (7 – 11 months)	2	\$11.00
Full-Time Seasonal (3 – 6 months)	34	\$21.28
Full-Time Seasonal (1 – 2 months)	23	\$24.13
Part-Time Year Round	23	\$12.62
Part-Time Seasonal (7 – 11 months)	15	\$13.86
Part-Time Seasonal (3 – 6 months)	11	\$14.02
Part-Time Seasonal (1 – 2 months)	9	\$15.55

\*24 out of 50 accommodations submitted data.

### Vanderhoof

Employee Classification	Number of Employees	Average Wage (\$/hour)
Full-Time Year Round	8	\$13.50
Full-Time Seasonal (7 – 11 months)	2	-
Full-Time Seasonal (3 – 6 months)	1	\$15.00
Full-Time Seasonal (1 – 2 months)	-	-
Part-Time Year Round	11	\$16.30
Part-Time Seasonal (7 – 11 months)	-	-
Part-Time Seasonal (3 – 6 months)	5	\$13.00
Part-Time Seasonal (1 – 2 months)	-	-

\*9 out of 14 accommodations submitted data.

### Burns Lake

Employee Classification	Number of Employees	Average Wage (\$/hour)
Full-Time Year Round	16	\$15.67
Full-Time Seasonal (7 – 11 months)	-	-
Full-Time Seasonal (3 – 6 months)	4	\$15.00
Full-Time Seasonal (1 – 2 months)	-	-
Part-Time Year Round	8	\$13.25
Part-Time Seasonal (7 – 11 months)	5	\$13.50
Part-Time Seasonal (3 – 6 months)	4	\$13.67
Part-Time Seasonal (1 – 2 months)	1	\$12.00

\*8 out of 17 accommodations submitted data.



### Granisle

Employee Classification	Number of Employees	Average Wage (\$/hour)
Full-Time Year Round	-	-
Full-Time Seasonal (7 – 11 months)	2	\$13.00
Full-Time Seasonal (3 – 6 months)	12	-
Full-Time Seasonal (1 – 2 months)	-	-
Part-Time Year Round	-	-
Part-Time Seasonal (7 – 11 months)	-	-
Part-Time Seasonal (3 – 6 months)	2	\$16.50
Part-Time Seasonal (1 – 2 months)	1	\$12.00

\*4 out of 9 accommodations submitted data.

### Fort St. James

Employee Classification	Number of Employees	Average Wage (\$/hour)
Full-Time Year Round	-	-
Full-Time Seasonal (7 – 11 months)	2	\$13.00
Full-Time Seasonal (3 – 6 months)	12	-
Full-Time Seasonal (1 – 2 months)	-	-
Part-Time Year Round	-	-
Part-Time Seasonal (7 – 11 months)	-	-
Part-Time Seasonal (3 – 6 months)	2	\$16.50
Part-Time Seasonal (1 – 2 months)	1	\$12.00

\*2 out of 13 accommodations submitted data.

No employment data was submitted by accommodations in Fraser Lake or Houston.

### Employment Definitions:

Full-Time                      An employee who works 30 hours or more per week.  
 Seasonal                        An employee who works for less than 12 months of the year.  
 Part-Time                        An employee who works less than 30 hours per week.

## APPENDIX D: References

- <sup>1</sup> Destination British Columbia. (2017). Value of Tourism in British Columbia in 2015.
- <sup>2</sup> Regional District of Bulkley-Nechako. (unknown). Regional District of Bulkley-Nechako Tourism Sector Profile.
- <sup>3</sup> Regional District of Bulkley-Nechako. (unknown). Regional Tourism Brochure.
- <sup>4</sup> Retrieved from <http://www.destinationbc.ca/BC-Tourism-Industry/Overview-of-Tourism-in-B-C.aspx>
- <sup>5</sup> Destination British Columbia. (2015). Gaining the Edge: 2015 – 2018 British Columbia’s Tourism Strategy.
- <sup>6</sup> Town of Smithers, Tourism Smithers, Bulkley Valley Economic Development Association. (2016). Five-Year Strategic Tourism Plan January 2017 – December 2021.
- <sup>7</sup> Destination British Columbia. (2017). Value of Tourism in British Columbia in 2015.
- <sup>8</sup> Expedition Management Consulting Ltd. (2016). Regional Tourism Economic Impact Study and Tourism Strategy Recommendations.
- <sup>9</sup> Tourism British Columbia. (2009). Tourism Assessment Vanderhoof and Area.
- <sup>10</sup> Paradigm Consulting Group. (2010). Barkerville Historic Town Tourism Economic Impact Assessment.
- <sup>11</sup> Bridge River Valley Community Association and Cara DeMare. (2015). Bridge River Valley 2013 Value of Tourism Study.
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- <sup>13</sup> Intrinsic Tourism Solutions. (2009). South Peace Region Value of Tourism Study.
- <sup>14</sup> Smart Move! Services. (2009). Quadra Island Value of Tourism Study.
- <sup>15</sup> S Clark and Associates, and Intrinsic Tourism Solutions. (2010). Regional District of Bulkley-Nechako Tourism Plan.
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Report Prepared By:

Justin Rousseau, Managing Director  
Expedition Management Consulting Ltd.

[justin@expeditionconsulting.ca](mailto:justin@expeditionconsulting.ca)

[www.expeditionconsulting.ca](http://www.expeditionconsulting.ca)

780-266-7888

**expedition**  
MANAGEMENT CONSULTING