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ADVENTURE TRAVEL AND LAND USE

December 1989

Pacific North Consulting

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ADVENTURE TRAVEL AND LAND USE IN BRITISH COLUMBIA

Introduction

The Tourism Industry in British Columbia has grown very rapidly for the last 10 to 15 years. During the recession in the early 80's, tourism remained a growth industry. Location being an important factor to growth, British Columbia is well situated to take advantage of the West Coast U.S. market and is ideally located to act as a gateway to the Pacific Rim markets.

As early as 1963 visitors to B.C. stated that "our magnificent scenic heritage overshadows every other reason" to visit the province. In subsequent surveys touring and sightseeing were considered the popular activities by visitors and residents alike. In 1977, the Ministry of Tourism, building on the natural scenery, wilderness, wildlife and fishing strengths of the province, launched a major ad campaign "Super, Natural British Columbia". This campaign illustrates the reliance on the land base and its scenic quality.

The complexion of the travel industry began to undertake some dramatic shifts. Energy shortages followed by world recession in the early 80's resulted in changes in the traditional travel markets. Travellers are seeking more active, meaningful experiences "to learn and acquire new interests and friends or to improve their physical well-being."[1] People wishing to get away from hectic pressure filled urban environments are seeking challenging recreational experiences, devoid of time and pressure or more relaxing, enriching past times. As a result, adventure travel and specialized touring activities dependent on the natural environment have become extremely popular world-wide and in particular North America.

Adventure Travel

There are several definitions of adventure travel. The most concise is "adventure travel generally takes place in an unusual, exotic, remote or wilderness destination and tends to be associated with high levels of involvement, participation and activity – most of it in the outdoors. Adventure travellers expect to experience varying degrees of risk and excitement and to be personally tested or stretched in some way; they are explorers of both an outer world, i.e. those unspoiled exotic parts of our planet and an inner world of personal challenge, self-perception and self-mastery."[2]

Although there is an emphasis on excitement, the products offered range from soft to risky and the element of excitement is very much an individual characteristic (Figure 1). From this perspective activity and experience range from casual observation to risky participation.

Adventure travel encompasses a wide variety of activities and experiences from downhill skiing to river rafting, hiking or fishing (Figure 2). In British Columbia adventure travel includes backpacking, hiking, mountaineering, heli-hiking, nature observation, sailing, boat cruises, bicycle touring, trail riding, downhill skiing, cross country skiing, canoeing, kayaking, river rafting, scuba diving, heli-skiing and consumptive uses hunting and fishing. These activities are land and water based.

British Columbia has been thrust on the world scene of adventure travel because of the range and diversity of adventure products and because of the perceived untouched clean green natural environment.

FIGURE 1

THE DIVERSITY OF ADVENTURE PRODUCTS AVAILABLE WORLDWIDE

ACTIVITY	SOFT/SAFE ———		EXOTIC/RISKY/"ROUGH"
Walk	Day walks through the country side	Trekking/backpacking with overnight camping	Expeditions in Nepal/ high altitude trekking
Canoe/kayak	Day canoe trips	Long-distance canoe trips with portages	River/sea kayaking
Rafting	Day-trips on Class I rivers	Class II-III rivers	Class IV-V rivers
Culture	Wineries of the Napa Valley	Visiting Thai Temples	Congo River adventure staying with native Africans
Nature Observation	Whale watching off B.C. coast	10 day cruise off Galapagos Islands	Studying gorillas in the Congo
Bicycling	Cycling in the Gulf Islands	Long-distance bicycle touring in the Rockies	Cycling through villages of China or India
Exotic Transportation	Sailing cruises through the Inside Passage, B.C.	Hot air ballooning over the Alps	Camel safaris in Africa or dog sledding in Alaska
Horse Riding	Day trips in the Rockies	Week long trail riding and over-night camping trips in the Rockies	The Australian Outback on horse-back

Source: Adventure Travel

FIGURE 2

SOBEK'S CLASSIFICATION OF ADVENTURE

\ HIKE or TREK is a journey on foot into reas not normally reached by road. Only day ear is carried. A trek is usually a longer trip, while hikes last just one day.

4OUNTAINEERING includes technical r extended high-country climbing, in either ummer or winter. Outfitters generally pro-ide technical gear where necessary (ropes, ardware, etc.). Ski mountaineering trips are ndicated by the use of both symbols.

\ NATURAL HISTORY trip focuses on he ecology, bird, or animal life of a given egion. Guides are well-versed in biology, otany and/or geology.

RIDING trips use horses, camels or llamas to arry passengers and their gear into remote ireas. In some cases the animals are used only or packing gear, not riding.

BACKPACKING trips are extended camp-ng trips where the client is expected to carry ll his or her personal gear as well as a share of he communal gear — cooking equipment, ents, etc.

SKIING includes both downhill (alpine) nd cross-country (nordic) styles of skiing. Style and degree of skill needed are described n the write-ups in greater detail.

EDUCATION trips feature expert guidance ind instruction from the trip guides or special eachers on the staff. Often a certificate of completion is issued. Examples include bal-looning and diving trips.

The KAYAK symbol includes canoeing as well — small, individual type watercraft for one or two persons, usually implying a base camp from which day trips are made. In some cases native craft are used — dugout canoes in the Amazon, *shikharas* in Kashmir.

SAILING trips are cruises on wind-powered craft on lakes, open sea or in shelterd areas such as coves or sounds. The sailboats may serve as home base for the trips or be used only for day trips. Participation in the sailing is a feature of some of these trips.

DIVING includes both scuba diving with underwater breathing apparatus and skin-diving, using only snorkle and mask. Outfitters generally provide underwater equipment, including scuba gear or snorkle, mask, fins, weight belts and air compressors where appropriate.

A CULTURE trek or overland trip places great emphasis on encounters with life-styles different from the Western norm, such as Sherpa villages in Nepal, Quechua Indians in Peru, Papuans in New Guinea, etc. In some cases the culture is a "dead" one, encountered through archeological records, ruins, etc. (Mayas in Mexico /Guatemala, Incas in Peru).

The FLIGHT symbol is used where flying is a major means of transportation, as in bush fling seaplane trips, or helicopter flights It is not included where a flight is but a means of reaching the trip proper, as a fly-in to a river trip or trek.

PHOTOGRAPHY trips focus on the skills and techniques needed to make the most out of the the photographic opportunities of a trip. A professional nature photographer is always on the staff of such trips.

The FISHING symbol is used when fishing is a primary part of the trip.

OVERLANDING is travel by van, four-wheel drive vehicle, or other motorized transportation to scenic or cultural highlights of an area. Usually camping is included. Though sometimes hotel or inn accommodations are used. In some cases other means of transportation may be used along the way — e.g., ferries, brief canoe trips or day hikes.

DOGSLEDDING is a time-honored means of carrying gear over snow and ice in the Arctic and sub-arctic regions of North America. Generally particpants take part in leading, harnessing and maintaining the sled dog teams.

BICYCLE trips use bikes as the primary means of long-distance touring. In such cases, while a minimum amount of gear is carried in panniers, a supply wagon will follow or procede the bikers with heavier camping supplies.

HOT-AIR BALLOONING is the use of nylon balloons to take trips of an hour or more over scenic countryside, relying on the uplifting effect of hot air and the currents of wind for movement.

RAFTING is always river travel with camping equipment and personal gear being carried on inflatable rafts by oars or paddle. In a few cases, it may be a "float trip", but usually implies whitewater.

CRUISE trips use larger motor-powered ships to travel up river, over seas or along coasts for comfortable yet close views of remote areas. Accommodations are in well-appointed cabins, and most meals are taken on board.

Source: Adventure Travel

Industry Growth and Markets

The growth in adventure travel has been expanding in leaps and bounds. It has been the "fastest growing segment of the U.S. travel industry, accounting for 5 to 10 percent of the $275 billion that Americans spent on tourism in 1985."[3]

In British Columbia the early 80's saw impressive increases in river rafting, kayaking, and skiing. Outdoor recreation became a booming business. In the travel survey Visitor '87, visitors to B.C. five reported trip purpose, 10% came for wilderness or adventure and 28% for an outdoors trip. A further 55% came for a touring trip which can be linked to the scenery in B.C.

Adventure travel industry responded to shifts in the market to the point where over 570 operators are involved with the adventure travel not including, hunting and fishing. Very much adventure travel has been fuelled by the "baby-boomer" need for experience and their available disposable income. The trend will continue. Operations in B.C. estimate the annual growth for British Columbia will be 15-21% for the next five years, higher than the travel industry itself.

The trend has been to packaging and offering all encompassing trips which would include one or more of transportation, accommodation, food, and activities. It is interesting to note that the more exclusive and more remote one gets, the more travellers pay for the experience. In particular, heli-skiing and heli-hiking cater to a very affluent market simply because of the high expenses involved.

The markets for British Columbia has been the province's traditional travel markets, basically Alberta, Ontario, rest of Canada, Washington/Oregon, California, and overseas. However, Adventure Travel is increasing in Eastern U.S. markets simply because of the "perception of our outstanding natural resources."[4]

Over 35 million North Americans seek adventure trips and in Canada alone 35% of the population want vacations involving adventure and outdoor activities.

The primary resident market for adventure travel is Vancouver and Victoria. The urban centers in Alberta, California, Ontario and Northeastern U.S. are considered the best areas for future growth in the non resident market segment.

British Columbia is recognized as having the ideal resources to support a growing adventure travel industry. As the product improves, becomes more sophisticated and the awareness of the B.C. product increases, this province should capture a good share of the market.

Economic Impact of Adventure Travel

In recent years due to the increasing emphasis on the environment and competing land uses as well as a growing adventure travel industry several studies have been completed, investigating various components of the adventure travel markets. The overlap between operations and product offerings makes it difficult to compare or total each component.

First of all the industry is made up of a variety of operations. Over 570 operations are involved in adventure travel not including hunting and fishing. Almost 200 operations are involved in fishing but only an estimated 135[5] offer accommodation. There is no estimate of hunting businesses but there is an overlap with both fishing and non consumptive wildlife uses. Many outfitters are involved in fishing and wildlife viewing during the non hunting seasons.

The most comprehensive review was in the report Adventure Travel in British Columbia. An estimated $55,700,000 was attributed to adventure travel in 1986. This did

not include hunting, fishing or downhill skiing. The report went on to estimate a total number of 1,044,000 client days (Figure 3).

The industry directly contributed 1610 person years of employment in 1986 with a wage income of $15,000,000. The industry purchased an estimated $29 million of goods and services from suppliers and the capital investment in the industry was estimated at $76 million in 1986.

Provincial impacts on adventure travel direct and total of the estimated 55.7 million were as follows:

	Direct	Total*
Value added	$26.6 million	$70.0 million
Wage income	$15.6 million	$46.9 million
Employment	1590 jobs	2810 jobs

* direct plus supplier-related consumer spending impacts

Source: Economic Impacts of the Adventure Travel Industry in British Columbia

It was estimated that the industry "generated $9.7 million in personal and corporate income tax to the provincial and federal governments."[6]

These figures were derived from 396 firms that off adventure travel products, contributing to the data collection process. It should be noted that this does not include all the firms operating in B.C. and it does not include the many users both resident and non resident that do not purchase an adventure travel package but prefer to "do-it-themselves". The same study estimated revenue from commercial hunting operations in 1986 to be $21 million and from fishing operations to be $57 million.

FIGURE 3

REVENUE AND CLIENT BASE OF THE B.C. ADVENTURE TRAVEL INDUSTRY
1986

Operator Class	Revenue $ Million	Overnight Clients		# Day Clients	Total Client Days*
		Number	Client-Nights		
Heli Ski	17.8	9,300	45,200	100	54,600
XSki/Ski Touring	3.9	11,900	38,000	15,400	65,300
Mountaineer/Backpack	5.9	7,900	100,100	5,600	113,600
Horse/Trail Riding	6.4	28,700	103,700	282,300	414,700
Nature Observation	2.8	2,800	17,700	2,200	22,700
Scuba Diving	2.3	17,500	48,900	18,600	85,000
Rafting	4.4	18,100	41,500	51,100	110,700
Kayak/Canoeing	1.7	8,500	30,400	1,100	43,000
Sailing Tours	7.0	5,400	35,200	20,300	60,900
Boat Tours	1.9	800	4,800	53,200	58,800
Other	1.6	1,300	7,900	6,100	15,300
Total	55.7	112,200	473,400	459,000	1,044,600

*Number overnight clients plus overnight client nights plus number day clients. i.e., number clients days for an overnight client is client-nights plus one.

Source: DPA Consulting Group, Economic Impacts of the Adventure Travel Sector in British Columbia, 1988.

Source: Adventure Travel in British Columbia.

Hunting

Figures recently released by the Ministry of Environment Wildlife Branch estimate to expenditures from direct spending of resident and non resident hunting in 1988 dollars at over $138,000,000. This figure includes travel, licence fees, food, etc. and is based on average daily expenditures from a 1981 survey updated to 1988 dollars and applying this to the 1987/88 hunter days. The same paper shows an estimated 1,393 person years of employment for resident hunting and 522 person years for non resident hunting.

Impact of Hunting
1988

	Residents	Non Residents	Total
Expenditures by hunters	$121,170,000	$17,013,400	$138,183,400
Employment (person years)	1,393	522	1,915

Source: Ministry of Environment, 1989.

Sport Fishing

The Department of Fisheries and Oceans estimated the value of fresh water sport fishing in B.C. to have a net economic value of $88 million, generating economic activity worth $300 million and saltwater fishing to be $77 million generating $350 million.

The fishing product in B.C. is world renowned for its saltwater and freshwater angling. The wilderness aspect in many ways is part of the attraction. In 1985 360,143 freshwater licenses were purchased; 21% were non resident to British Columbian anglers and came from all over North America. Non residents spent fewer days fishing in B.C. than residents – 6.6 days compared to 17.6 days. Fisheries and Oceans reported a total of 712,318 nights were spent on fishing trips by non residents. Approximately 12.7% of these were spent at fishing lodges or camps and 9.1% were spent at other commercial accommodations.

In 1985, 332,888 tidal (saltwater) fishing licences were sold; 72% were resident, 8% other Canadians, 20% U.S. residents and 1% overseas visitors. According to Fisheries and Oceans, salmon was the predominant fish caught. Fishing was the main reason (56%) non residents came to B.C. to fish. "The two most important factors to ensure a successful fishing trip were scenic surroundings and the opportunity to catch fish."[8]

Over 925,400 nights were spent on saltwater fishing by non resident anglers – about 34% more than residents, 12% were spent in fishing lodges of camps and 16% were spent in commercial accommodation. From 1984/85 to 1986/87 resident anglers increased 8% while non resident increased 28%.

In 1988 a study of fishing lodges and resorts in B.C. was undertaken. In 1987, 135 operations were surveyed and used to estimate the total economic impact of a total of 257. The gross revenue from all sources was estimated at $70,100,000 (Figure 4). Over 64 million was attributed to sport fishing; the client base was determined to be 178,700 guests and employment at 1310 person year equivalent basis. Wages and salaries paid to residents were estimated to be $22.5 million and $28.5 were purchases from suppliers. The study estimated personal and corporate income taxes to be $12.1 million in 1987 (Figure 5).

Capital expenditures of $38.3 million resulted in the following impacts:

Gross Domestic Product/Value Added	$34.7 million
Wage or Labour Income	$23.3 million
Employment (person-year equivalent)	670

FIGURE 4

ECONOMIC PROFILE OF THE BRITISH COLUMBIA FISHING LODGE/RESORT INDUSTRY

	Saltwater	Freshwater	Total
Operations (No.)[2]	51	206	257.
Gross Revenues from All Sources ($ Million)	49.0	21.1	70.1
Gross Revenues from Sport Fishing ($ Million)[3]	45.5	19.3	64.8
Client Base			
- Guests ('000)	47.8	130.4	178.2
- Client Nights ('000)[4]	158.4	545.4	703.8
Full and Part Time Employment, by Season:			
- January, 1987	360	210	570
- April, 1987	760	430	1190
- July, 1987	1210	890	2100
- October, 1987	660	600	1260
Employment: Person-Year Equivalent Basis[5]	820	490	1310
Accumulated Capital Investment ($ Million)[6]	57.1	82.3	139.6
Total 1987 Capital Expenditures ($ Million)	28.2	10.1	38.3
Wages and Salaries ($ Million)[7]	15.2	7.3	22.5
Purchases from Suppliers ($ Million)[8]	19.9	8.6	28.5

N.B. Footnotes are at the end of the chapter.

Extrapolated for industry universe from operator sample

Our estimates of the gross revenues of the fishing lodge/resort industry can be compared with the revenues of other outdoor recreation industries.

Source: Fishing Lodges and Resorts in British Columbia.

FIGURE 5

GOVERNMENT INCOME TAX REVENUE

	Personal Income Tax ($ Million)	Corporate Income Tax ($ Million)	Total ($ Million)
Provincial	2.8	1.0	3.8
Federal	6.2	2.1	8.3
Total	9.0	3.1	12.1

Source: Fishing Lodges and Resorts in British Columbia.

In a 1988 users' survey undertaken as part of the Fishing Lodges and Resort Survey, the most important factor in selecting a fishing lodge resort was natural/scenic beauty, followed by remoteness of location.

Guest Ranches

In 1987 a study of guest ranches was undertaken. Guest ranches offering a western theme include experiences such as dude ranches, working cattle ranches or farms or resorts with good quality accommodation and facilities.

To be included in the study guest ranches had to have on-site accommodation and horseback riding. Thirty-four operations were identified and 25 were part of the study. The market for these ranches are primarily B.C. residents; however, other Canadians and U.S. visitors account for 21% and 20% of the total market, respectively. A very high proportion (14%) of the market is European.

In 1986, this segment of the adventure travel market generated an estimated $3,545,600 from 102,416 visitor nights of business (Figure 6). Total capital investment of 634 ranches for 1986 was $20,331,000. Employment was estimated at 46 full-time yearly employees, 96 full-time seasonal and 36 part-time employees.

The operators interviewed were very optimistic about the future and foresee good growth potential in the industry. Several operations "have a major concern for the protection of the environment". They are concerned over the accessibility and availability of Crown Land for trail rides. Many feel the protection of the environment is essential to the success of their business.

FIGURE 6

ECONOMIC COMPARISON OF BRITSH COLUMBIAN GUEST RANCHES: 1986

	FULL SERVICE		RUSTIC		TOTAL
	Surveyed[1]	Extrapolated[2]	Surveyed[1]	Extrapolated[2]	Extrapolated
SUPPLY					
Number of Properties	7	9	18	25	34
Number beds/night	329	429	395	471	900
ANNUAL VISITOR NIGHTS					
Total	46,500	48,500	40,572	53,916	102,416
Average/Property	6,645	--[3]	2,300	--	
ANNUAL GROSS REVENUES					
Total	$1,959,000	$ 2,609,000	$636,000	$ 936,600	$ 3,545,600
Average/Property	$ 279,900	--	$ 35,300	--	
CAPITAL INVESTMENT					
Total	$9,026,000	$13,026,000	$5,539,000	$7,305,000	$20,331,000
Average/Property	$1,290,000	--	$ 308,000	--	
TOTAL STAFF					
Yearly Full-time	30	--	16	--	46
Seasonal Full-time	44	--	52	--	96
Part-time	22	--	14	--	36

1 Economic data based on telephone survey of 25 guest ranch operators.

2 Economic data extrapolated to include the 9 guest ranches not surveyed.

3 Data have not been extrapolated.

Source: Guest Ranches of British Columbia.

Wildlife Viewing

A product segment that is just beginning to flourish in British Columbia is wildlife viewing. B.C.'s wildlife viewing resource is described as "exceptional" and the market interest in the resource is "tremendous". It is suggested that if the wildlife viewing product be developed sensible, in an environmentally sensitive manner, B.C. could "enjoy a leadership position in the burgeoning wildlife viewing tourism sector."[9] Wildlife viewing appears to be a rapidly increasing activity. Twenty-two percent of Canadians took special trips involving wildlife viewing and 45.5% had encounters with wildlife other than hunting. These figures increased proportionately from the 1981 survey by 2% and 1.5%, respectively.

The Ministry of Environment estimates the value of non consumptive uses of wildlife at $584,808,000 in 1988. This figure is based on a 1983 survey but presented in 1988 dollars. Employment in non hunting activities is estimated at 10,153 person years.

The study Adventure Travel in British Columbia 1988 estimated the commercial segment of wildlife viewing to be $2.5 million. A sample of 17 operations was used to derive this figure. The industry provided a total of 31,500 user days to yield the revenue stated.

The viewing activities in B.C. can be carried out all year long which can potentially expand the traditional tourism seasons.

The market potential is considered very good. There appears to be an increasing awareness of both wildlife and the opportunities available. Market projections outlined in the study Wildlife Viewing in British Columbia show a potential increase of 30% in primary markets and as much as 90% in secondary markets. The primary market being those who specifically travel for some form of wildlife activity (currently estimated at 10.7 million visitor days), and secondary being visitors who are active but only as part of another trip (estimated at 2.2 million persons) (Figure 7).

FIGURE 7

Wildlife Viewing Markets Summary

	Primary		Secondary	
	Immediate	**Potential**	**Immediate**	**Potential**
Resident	9.14 million visitor days	9.6 million visitor days	1.39 million persons	1.8 million persons
Nonresident	1.52 million visitor days	4.37 million visitor days	0.8 million persons	2.2 million persons
Totals	**10.7 million visitor days**	**14 million visitor days**	**2.2 million persons**	**4 million persons**

Source: Wildlife Viewing in British Columbia.

Cruise Ship Industry

The attraction of cruise ship industry on the B.C. coast is based on the scenic beauty of the Inside Passage, Northern B.C., and Alaska. While the industry is not dependant on land as such, it is very much dependent on the scenic integrity along the cruising routes and the abundance of wildlife both marine and land.

Currently passengers embarking from North American ports account for 86% of the passengers in the world. A steady increase of over 10% per year has been recorded in this area. Alaska accounts for 6.7% of the total passengers and is ranked as the fourth most popular destination. The Alaska market is "considered to have the second greatest growth potential"[10] of all current destinations.

B.C. ports serve as embarkation ports or ports of call for ships cruising to Alaska. In 1987 219,413 passengers were handled in B.C. ports (Figure 8). Over 77% were of the traffic went through Vancouver. Victoria, Prince Rupert and Port Hardy were the other primary ports involved. Growth has been about 10% per year since 1984.

The primary markets for the B.C./Alaska Cruises is the Western United States, primarily California (26.1% of the total). The U.S. in total contributes over 90% of the total number of passengers. The cruise industry is expected to grow at a rate of 14% per year.

One of the strengths on the B.C. ports is the variety of activities available for passengers. In particular, fishing, canoeing, hiking, scuba diving, river rafting, and horseback riding, were activities mentioned. In addition, the native heritage and wildlife resources along the coast are an added draw. Smaller cruise vessels are now offering these unique experiences in their itineraries.

FIGURE 8

NUMBER OF CRUISE PASSENGERS THAT CALLED AT PORTS IN B.C. IN 1987

Type of Cruise	Number of Passengers
Vancouver	
Roundtrip	107,617
One-way Northbound	27,995
One-way Southbound	28,027
Port of Call	20,417
Repositioning and Round the World Cruises	20,906
Sub-Total	204,962
Prince Rupert	
Roundtrip	2,564
One-way Northbound	1,775
One-way Southbound	1,914
Port of Call	90
Sub-Total	6,343
Victoria	
Port of Call	43,211
Port Hardy	
Port of Call	9,000
Total calls made by cruise passengers	263,516
Less: Passengers that stopped in more than one port of call	44,103
Total number of B.C. passengers handled by B.C. ports	219,413

Source: Don Ference & Associates Ltd.

The economic benefits to B.C. accrued from the cruise industry are estimated to be between $66.4 and $85.3 million (Figure 9). These revenues are from passenger expenses and the provision of services, such as fuel, provisions, port charges, repairs and more.

The recommended direction for developing cruises in B.C. waters is to utilize the strengths of the unique native heritage and the rich scenic beauty of the coastal mountains and fjords and the wildlife and marine animals.

Camping

Camping in B.C. is represented in several forms. There is the use of government or public campgrounds, private campgrounds, forest recreation sites and wilderness or unorganized camping. The camping segment of the tourism industry is a significant portion of the industry but one that has not been accurately quantified.

In the travel survey Visitor '87, 24% of the visitors to the province used campground as their main form of accommodation.

Camper nights in the provincial campgrounds were as high as 2.0 million in 1985 down from 2.4 million in 1981. The reduction was attributed to the recession in the earlier 80's and the expense of RV use. Add to this total the private sector and unorganized camping the economic impact of this segment in significant.

The camping market is predominantly B.C. residents. Campground users in B.C. include the traditional tourist market areas of Washington, Oregon, California, Alberta and the rest of Canada.

FIGURE 9

ESTIMATED ECONOMIC BENEFITS OF B.C./ALASKA CRUISE SHIP INDUSTRY TO CANADA IN 1988 ($000,000'S)

Service Related	Low	High
Bunkering	14.6	15.0
Provisioning	8.5	10.5
Pilotage	2.7	2.9
Moorage, Port Charges and Services	2.9	3.4
Repairs and Maintenance	2.0	3.5
Passenger Handling	3.1	3:4
Office and Related Expenses	.8	1.0
Airports	1.1	1.4
Crew Expense	.4	.6
Sub-Total	36.1	41.7
Passenger Related		
Use of Canadian Carriers	9.0	12.0
Tours and Excursions	1.3	1.7
General Expenditures	8.6	13.8
Hotel Accommmodation and Meals	3.9	4.6
Pre and Post Tours	7.5	11.5
Sub-Total	30.3	43.6
TOTAL ECONOMIC BENEFITS	$66.4	$85.3

Source: Cruise Ship Industry Development Strategy.

Recent trends in the camping industry are changing the industry. Camping resorts are becoming more prevalent. Visitors can now purchase camping sites in newer developments. The use of RV's is continuing to grow.

Three market segments are evident.

1. The more adventuresome wilderness camper.
2. The rustic camper who prefers organized camping but few services.
3. The sophisticated camper who wants the organization and all the services from stores, showers and activities all in one site.

Unfortunately, the data analyzing camping is scarce. A study reviewing the RV and campground sector in B.C. has recently been completed but not released as yet. However, "focus groups" used as part of the study process looked at the motivation to camp amongst B.C. residents. Clearly getting away from the city to the outdoors was the primary motivation for B.C. residents to go camping. Camping very much was a family-oriented behaviour and appealed to all ages. Camping went hand-in-hand with other outdoor activities such as fishing, boating, hunting, swimming and hiking.

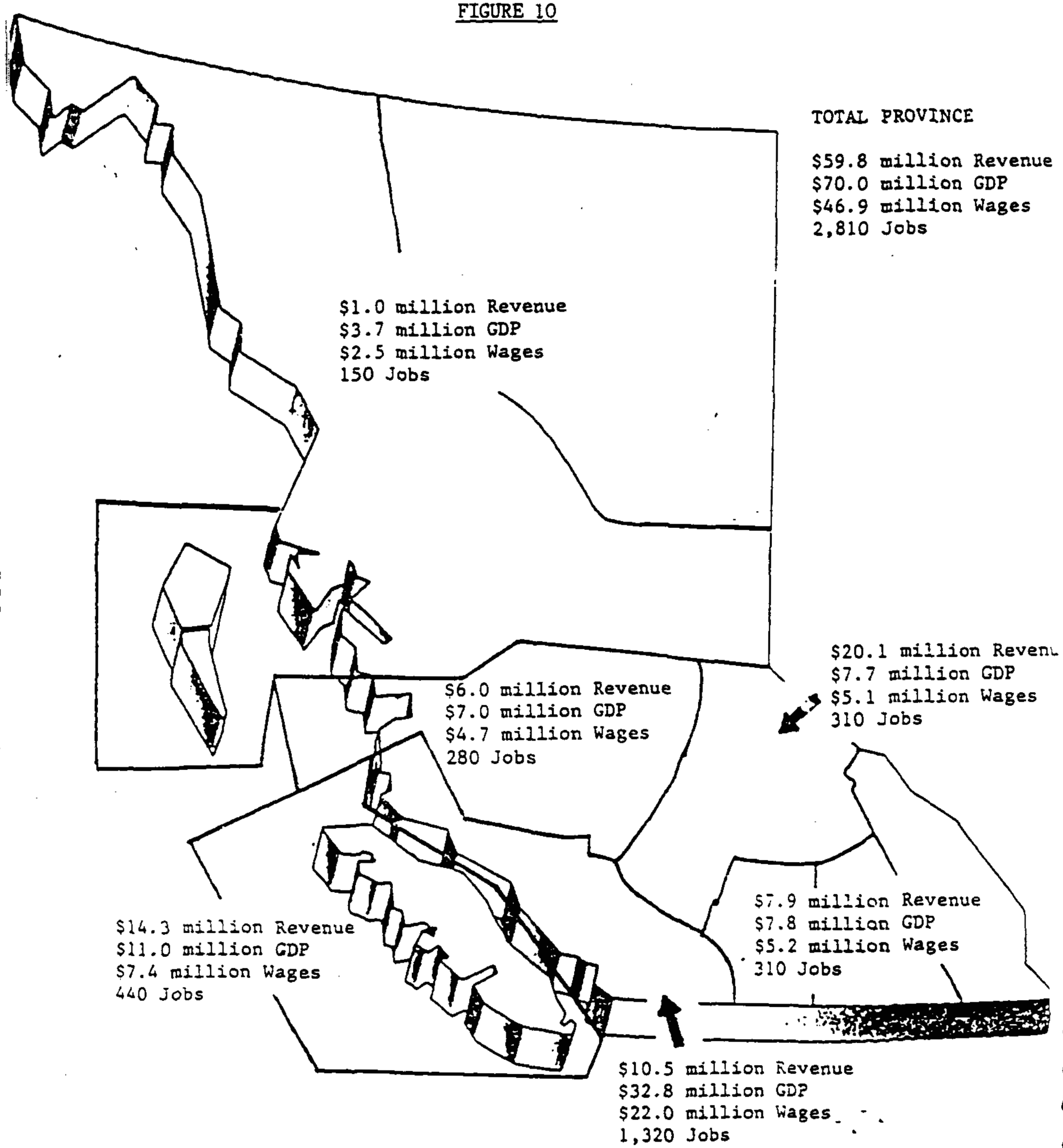
One important fact is camping in B.C. as so many other activities, is dependent on land resources.

Regional Impacts

The regional impacts in B.C. from adventure tourism are significant. First of all the nature of the industry relying on the tourism products outside urban areas increases the regional emphasis. The regional impacts from commercial enterprises were addressed in the 1986 Adventure Travel study. Figure 10 illustrates the break out of revenue, wages and jobs by Region.

REGIONAL IMPACTS OF THE ADVENTURE TRAVEL INDUSTRY, 1986

FIGURE 10



Source: Economic Impacts of Adventure Travel in British Columbia.

Tourism and Land Use

The adventure tourism and outdoor recreation components are extremely dependant on the quality of the land resource. British Columbia has used the slogan Super, Natural British Columbia to underscore the adventure travel products with a great deal of success. However, all tourism in B.C. is dependant on the scenic values and natural beauty of the province.

Selling tourism is different from selling other commodities. In most cases the product is taken to the consumer but in the case of tourism the consumer is taken to the product. Therefore, transportation to and around the province is extremely important. In many cases, because of a heavy touring segment of the travel industry, transportation routes in B.C. are as much the product as resorts and attractions.

The Tourism Development Strategy produced in the early 1980's for the Ministry of Tourism recognized the importance of transportation and recommended a development approach along transportation corridors utilizing B.C.'s scenic products. They also recognized the success of tourism depends on access to the product and the consumer demand for the products.

However, one of the shortcomings of this approach was the fact that the tourism industry had no jurisdiction over its resources; therefore was at the mercy of those resource agencies that did. Currently Crown Lands are controlled by the Ministry of Forests. However, the Ministry of Forests is primarily concerned with sustaining timber production. The tourism industry is as dependent on the land use as are other resource use oriented industries and perhaps more. For example, a scenic view shed may stretch for miles and miles across open land or along transportation corridors whether it be rafting along a river, taking part in trail rides or driving in an automobile along a highway.

The lack of control over the land base does make it difficult to plan and develop long range plans for the tourism industry. Certainly there are examples of forest industry adversity affecting tourism operations.

The resources available to the tourism industry include wilderness areas, rivers for viewing and recreation, shoreline for viewing and recreation, travel routes – land and water including scenic vistas, fisheries salt and fresh, wildlife and their habitat – land and sea. All these require the integrity of the land resource to attract visitors and all have a demonstrated market appeal whether it be for the resource or a related activity that utilizes the resource.

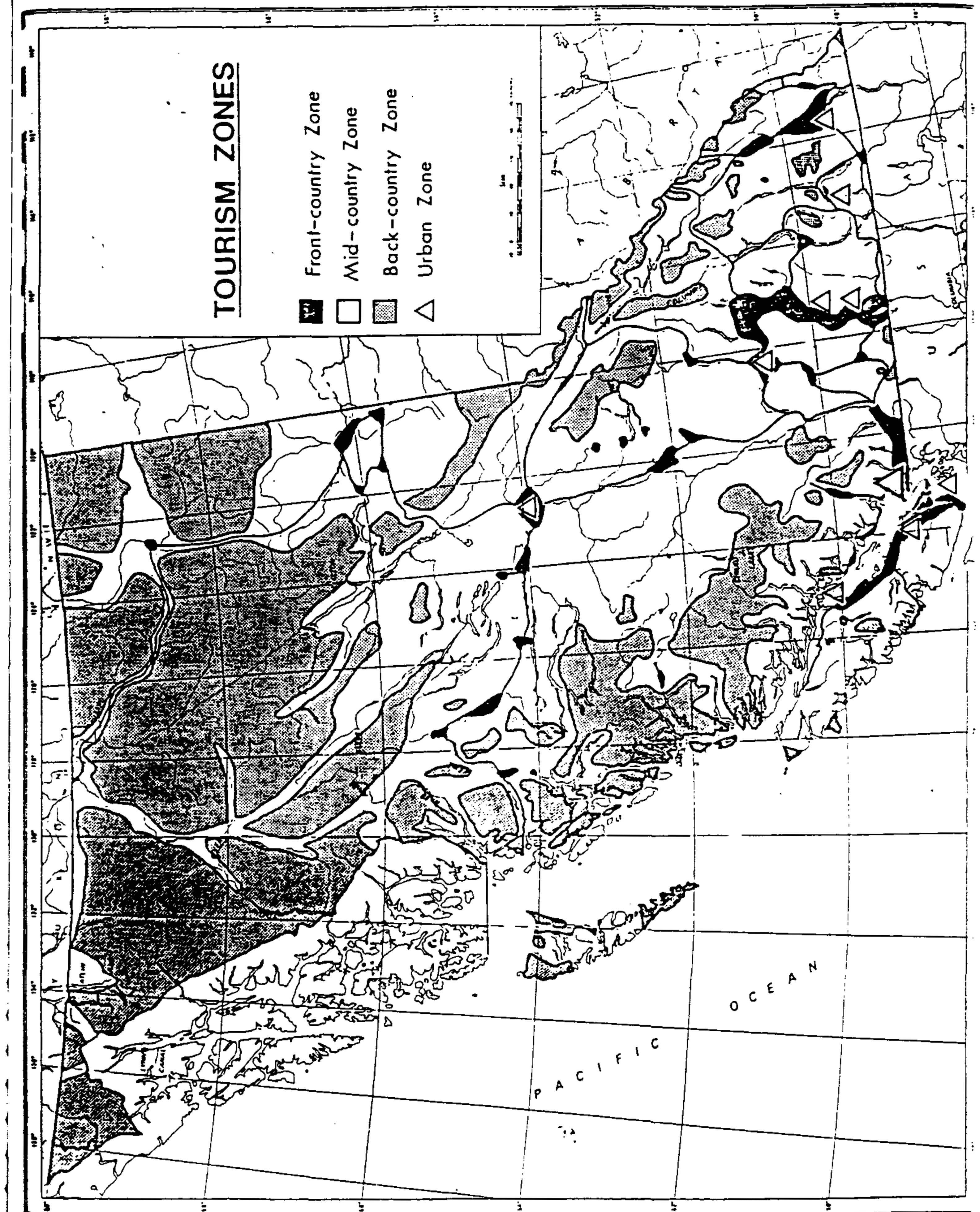
Land Classifications

It is difficult to assess the specific demands on the land base or to predict the type of demand for certain types of forest land whether it be mature timber or immature stands. A land classification system was discussed in the study Towards a Strategy for Natural Resource-Based Tourism prepared for the Ministry of Tourism. The land was differentiated into four basic land zones (see map).

1. Urban
2. Front-country/intensive
3. Mid-country
4. Back-country

The difference between the zones is based on the resources and the level of use. The level of use is generally tied to the degree of access.

The Urban Zone is made up of the larger cities and towns and is readily accessible by all visitors. There is very little demand on the provincial land base.



The Front-country is the most intensive zone of tourism use where most of the services and infrastructure are provided. This zone is located along major transportation routes, generally is human altered. Recreation, attractions and activities are readily available and are tied to the volume and transportation.

Mid-country Zone is utilized by a lesser number of people. Development is on a smaller scale more in harmony with the natural environment. Mass transport is non existent except by way of secondary or back roads. The potential for land use conflict is high in this zone.

The Back-country Zone is the high quality wilderness areas that are characterized by high cost activities such as big game and fishing, river rafting, trekking, trail riding, ski touring, mountaineering, etc. There is an absence of motorized vehicles and lack of infrastructure. Landscapes have not been altered by man.

It is interesting that the "wilderness represents the ultimate image of the pristine and quality Super, Natural British Columbia."[11] It should be noted that the definition of wilderness is an individual perception, therefore changes from individual to individual. Persons from urban centres with little exposure to the outdoors may consider a provincial park in the Front-country Zone to be wilderness. It is equally important, to maintain the visual land integrity for the enjoyment of all visitors to B.C. to sustain a healthy tourism industry, no matter what zone it is in.

Conclusions

The economic contribution to the B.C. economy due to adventure travel is significant. The total impact is difficult to determine due to overlap of activities, varying methods of determining values, and information produced in different time periods.

The market potential for adventure travel indicates continued growth for many years to come and expansion at rates higher than the tourism industry.

B.C. offers a variety of activities and opportunities that are linked directly to the quality of its natural resources. The unspoiled, scenic image promoted by B.C. puts the province at the forefront of adventure travel destinations. The ability to deliver a quality experience and enhance the image will improve an already healthy industry.

Footnotes

[1] Outdoor Recreation Council, Adventure Travel in British Columbia, 1988.

[2] Ibid.

[3] L.J. D'Amore & Associates Ltd., Adventure Travel Potential for Canada, 1986.

[4] Ibid.

[5] DPA Group, Fishing Lodges and Resorts in British Columbia, 1988.

[6] DPA Group, Economic Impact of the Adventure Travel Industry in British Columbia.

[7] DPA Group/Maclaren Plansearch Corp., Fishing Lodges and Resorts in British Columbia.

[8] Ibid.

[9] Ethos Consulting, Wildlife Viewing in British Columbia, 1988.

[10] Don Ference & Associates Ltd., B.C. Cruise Ship Industry Development Strategy, 1988.

[11] L.J. D'Amore & Associates. Towards a Strategy for Natural Resource-Based Tourism, 1987.

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Appendix E-1
Values of Wildlife (Tables)