HIGHWAY 3

DESTINATION DEVELOPMENT

SITUATION ANALYSIS

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EXECUTIVE SUMMARY

Background and Purpose

Destination BC is offering destination development planning assistance to support the ongoing viability of BC's tourism sector. The Destination Development Program (Program) is a critical part of Destination BC's corporate strategy and will facilitate the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators and other community interests to guide the long-term growth of tourism experiences and revenues.

Destination development is all about bringing together planning, policy and capacity building efforts to:

- Ensure that a destination is well positioned to make future strategic decisions;
- Address impediments to growth and capitalize on opportunities;
- Outline key assets of a destination including the main product themes/experiences available;
- Outline key priorities for new product, infrastructure and amenity development; and
- Identify impediments to development and tourism growth (e.g., potential policy or capacity issues, available funding, access to funding etc.).

The benefits of destination development include:

- Creation of a clear 'road-map' for the destination;
- Leveraging the strength of the destination as seen by the visitor;
- Identifying opportunities and challenges to tourism growth;
- Establishing a joint vision that will direct development activity in a range of areas;
- Establishing priorities and align investments to grow the visitor economy; and
- Establishing the basis for joint action and inter-community dialogue.

Planning Area

The Highway 3 planning area (including Highway 3A, Highway 3B and Highway 43)[1] stretches east-west from Hope along 838 km of mountainous roads, through Manning Provincial Park, Princeton, Hedley, Keremeos, Olalla, Cawston, Okanagan Falls, Oliver, Osoyoos, Rock Creek, Midway, Greenwood, Grand Forks, Christina Lake, Nancy Greene Provincial Park, Rossland, Warfield, Trail, Montrose, Fruitvale, Castlegar, Nelson, Balfour-Procter, Crawford Bay, Boswell, Sanca, Kuskonook, Sirdar, Wynndel, Salmo, Creston, Kitchener, Yahk, Moyie, Cranbrook, Kimberley, Ft. Steele, Wardner, Jaffray, Elko, Morrissey, Fernie, Hosmer, Elkford, Sparwood and reaching the boundary with Alberta at Crowsnest Pass.

[1] The Highway 3 planning area includes Highways 3A, 3B and 43, in the report the term 'Highway 3' refers to all the highways in the planning area.

Highway 3 in its entirety is referred to as the Crowsnest Highway; it stretches from Hope, BC to Medicine Hat, Alberta over 1,161 km. Within BC, Highway 3 is also known as the Southern Trans-Provincial Highway and Highway 43 is known as the Elk Valley Highway. Highway 3A is in two segments, the first is the Castlegar-Nelson-Creston Highway, where a ferry takes Highway 3A across Kootenay Lake to Kootenay Bay and the second is the Keremeos-Kalden Junction Highway. Highway 3B is an alternate loop to the Crowsnest Highway between Nancy Greene Lake and Meadows.

These highways encompass the jurisdictions of the Fraser Valley Regional District, Regional District of Okanagan-Similkameen, the Regional District of Kootenay Boundary, the Regional District of Central Kootenay, and the Regional District of East Kootenay.

Highway 3 travels through several First Nations (includes several Bands), that of the Stó:lō Nation, Sinixt Nation (Castlegar), Okanagan (Syilx) Nation, Yale First Nation (Independent) and the Ktunaxa Nation. There are many Provincial Parks with E.C. Manning Provincial Park being the largest (83,671 hectares).[2]

The Highway #3 Mayors and Chairs Coalition is comprised of local government elected officials from the majority of communities and regional districts located on Highway 3. A subcommittee was struck to explore branding and marketing the Crowsnest Highway #3 corridor. Destination BC has agreed to provide planning assistance through the Destination Development Program, along with the tourism regions of Thompson Okanagan Tourism Association and Kootenay Rockies Tourism.

Tourism and recreation opportunities as well as lifestyle/amenity migration have begun to shift the dependence from the resource based to a more diversified economy that also includes agri-tourism, viticulture, heritage tourism, manufacturing and tech start ups.

Traditional major attractions and activities for the area include outdoor recreation (hiking, golf, mountain biking, skiing, swimming, boating, fishing, etc.), galleries, museums, wineries, fruit markets, touring old mines, resorts and camping.

Communities along Highway 3 are accessible by motor vehicles (bikes, car, motorcoach etc.). The District Municipality of Hope is also accessible by railway (VIA Rail Canada) and the Grand Forks Railway (which links to the Kettle Falls International Railway which goes to the United States). Several communities along Highway 3 are accessible by air including Hope Airport/Aerodrome, Midway Aerodrome, West Kootenay Regional Airport (Castlegar), Sparwood/Elk Valley Airport, Cranbrook/Canadian Rockies International Airport, Trail Regional Airport, Oliver Airport, Nelson Airport, and Grand Forks Airport.

There are visitor centres in Hope, E.C. Manning Provincial Park, Sparwood, Cranbrook, Castlegar, Creston, Rossland, Kimberley, Trail, Nelson, Elkford, Hedley, Oliver, Fernie, Christina Lake, Greenwood, Grand Forks, and Osoyoos that provide visitor information, assistance and advice.

[2] http://www.env.gov.bc.ca/bcparks/explore/parkpgs/ecmanning/

Six communities are actively committed to growing their tourism economy through destination marketing and management initiatives delivered by dedicated DMOs, funded in part through the collection of the MRDT (Hope, Fernie, Kimberley, Nelson and Kootenay Lake (Balfour), Rossland, Castlegar and Osoyoos).

Tourism Industry Context (Trends and Management Structure)

- Tourism is one of the largest and fastest-growing economic sectors in the world. 2015 was no exception, with international tourists arrivals (ITAs) growing 4.4% over 2014 to reach 1,184 million. Long-term, continued growth is expected over the next two decades. According to the UNWTO's Tourism Towards 2030, global ITAs are expected to increase by an average of 3.3% per year from 2010 to 2030.

- Over the past decade, there has been steady growth in the economic performance of the Canadian tourism industry. Tourism is Canada's top service export, although Canada has not kept pace with its competitors. Canada's market share of global international tourism arrivals has declined from 2.9% in 2000 to 1.5% in 2014. Further, although Canada remains amongst the top twenty most-visited countries, in terms of international visitor arrivals it has slipped from 8th place in 2000 to 17th in 2013.

- The tourism industry continues to play a significant role in the BC economy. In 2014, the BC tourism industry generated $14.6B in revenue, a 5% increase from 2013, and a 38% increase over 2004. Also, the tourism industry contributed $7.1 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 4.5% growth over 2013 and 13.1% growth since 2007. A total of 127,500 people were employed in tourism-related businesses, a 2.2% increase over 2013 and an 18.4% increase since 2004.

- More recent BC tourism performance indicators showed that 2015 was an exceptional year of growth. There was an increase of 8% in total overnight international visitor arrivals due to strong growth from the United States (10%) and moderate growth from Asia/Pacific (5%) and Europe (4%).

- Over the past decade, there have been substantial shifts in the tourism marketplace that have resulted in the growing importance of the delivery of outstanding travel experiences. High satisfaction with travel experiences is critical to achieve increased visitor spending, longer stays, repeat visits and positive word of mouth referrals. Destination advocacy, either face-to-face or through electronic media, is critical to attract first time visitors to British Columbia. On-going product development is key within destination development to ensure that iconic experiences meet and ideally exceed visitor expectations.

- To address some of these consumer shifts, the tourism system in BC has adapted. These changes include:
    - BC's tourism system is evolving to become more aligned in both destination development, marketing and use of the BC destination brand;

- New roles for the regional tourism organizations and business advisors with an increased focus on destination development. New roles for the sector marketing organizations (e.g., mountain bike, boating, etc.) with an increase role in marketing provincially;
- An increased number of 2% tax funded communities through the Municipal and Regional District Tax (MRDT). Increase of allowable MRDT tax from 2% to 3%, which may inject an additional $10 million to $20 million into the tourism system (currently ~ $30 million collected by over 50 MRDT communities in BC);[3]
- Increasing focus on content creation, data-driven on-line marketing, advocacy and social media;
- Increasing use of Net Promoter Score® (NPS®) to measure the intention to recommend/refer a travel destination, organization or sector. Destination BC has identified NPS drivers as a common provincial goal.
- Assisting tourism businesses to evolve their offerings and meet and exceed guest needs and expectations through the development of remarkable experiences.
- A strong focus on destination development throughout the province through collaborative, integrated planning and coordination that leads to enhanced tourism economic growth.

Highway 3 Performance and Market Analysis

There are few indicators available to measure performance of the entire vistor economy along Highway 3, and no information to identify the quantity of visitors or the value of the visitor economy. Information from a provincial or regional perspective suggests that similar to many areas in BC, Highway 3 experienced significant increases in visitation and tourism revenues in 2015. Indicators from tourism operators along the corridor suggest 2016 was a year of positive growth, and 2017 is also expected to yield positive results.

Many of the communities and tourism operators experience higher visitation and revenues in the summer months; winter resorts and products see a more consistent year-round visitation but also have capacity within the shoulder season.

Highway 3's largest visitor base is the BC and Alberta resident with primary focus on the close-in markets of the Lower Mainland and Southern Alberta (Calgary, Lethbridge, Medicine Hat).

Highway 3 Destination Assessment

Overall, the Highway 3 corridor has appeal as a travel route with multiple destinations either along the route (e.g., Manning Park, Osoyoos, Kootenays, etc), or at either end (Metro Vancouver, Whistler, Banff or Calgary). It is a large, rural area with a significant number of activities, attractions and communities along it's route,

3 Source: Destination BC

which can be a positive for some travellers (e.g., lots of places to stop, unique towns to visit, etc), or a detractor (slower route, rural environment may not provide amenities, etc).

As a planning area, Highway 3 benefits greatly from the existence of the Highway 3 Mayors and Chairs Coalition and their Tourism Sub-Committee, who have already worked collaboratively with the Provincial Government to improve the experience along the route, predominantly a better driving experience through improved signage and safer roads and pedestrian walkways. Significant investments have been made to improve the road conditions. Having this group already established and working collaboratively on priority initiatives sets a great foundation for moving forward.

There are currently multiple iconic demand generators (such as Manning Park, ski resorts, summer destinations) and an abundance of additional experiences with potential to further increase the visitor interest for travelling along Highway 3. However, areas of predominanly summer season destinations (e.g., Osoyoos, Princeton, etc) have large gaps in its year-round offering to visitors. Areas with strong winter product (e.g., Fernie, Rossland, Kimberley, Manning Park, etc) have more significant capacity opportunities in the shoulder season (spring/fall).

Overall, the corridor lacks a strong, iconic destination or attraction (e.g., the Sea-to-Sky Gondola), however it's appeal is the combined experiences all along the route like a "string of pearls" that offer a unique experience over other options such as the faster but less scenic Highway 5 (Coquihalla Highway).

In many ways, communities along the highway have taken great steps to improve the climate of the tourism industry and visitor economy. But the level of visitation doesn't reach significant volumes to achieve year-round business sustainability and enable all communities and destinations along the corridor to fully benefit from it's potential.

Constraints that limit the corridor include: road conditions and rest stops; consistent cell/internet service; business operating climate; lack of new products, experiences, attractions and year-round activities; and staffing constraints. Similarly, there are multiple risks associated with future tourism development, such as trail and land use management, RMI funding, short-term housing rentals, etc.

Highway 3 Planning Considerations

This document identifies 23 Planning Considerations - the key direction(s) the Highway 3 Destination Development Plan should address. These include: development as a destination as well as a driving route option; creating a critical mass of year-round experiences, e.g., outdoor adventure, Aboriginal, agri-tourism, festivals and events, etc.; enhancing collaboration; ensuring reliable transportation access; retaining the 'small-town' charm and local way of life; telling a unified "story" of the corridor in a compelling way that resonates with visitors; ensuring overnight stays in a range of accommodation options; improving local government and community support of tourism and tourism businesses; addressing human resource challenges; improving the investment climate and business support; and addressing policies that create barriers to growth.

1 PLANNING CONSIDERATIONS

This section summarizes the planning context from the rest of this document and provides the key direction(s) the Highway 3 Destination Development Plan should address.

1. The Highway 3 corridor can be developed as a a driving route to get to a destination along the way (e.g., Rossland to ski or visit family) or another destination outside the corridor (e.g., Banff, Alberta), as well as a vacation choice in itself (touring along the highway). Both of these require different development requirements and both should be included in the destination development strategies.

2. There are clusters of tourism experiences that have succeeded in creating a critical mass of remarkable experiences that motivate travel to these destinations – Nelson and Fernie are examples of the kind of year round tourism success that is possible in the planning area. However, between these destinations are rural areas that are struggling to secure a level of visitation that can support business viability. There are isolated successful operations, e.g., Manning Park Resort, but for other businesses and communities, destination development must first consider opportunities for collaboration and leveraging to create collections of experiences that combine to offer a scope and scale necessary to motivate travel.

3. The efforts by the Highway #3 Mayors and Chairs Coalition, and their Tourism Sub-Committee, have set a solid foundation for working together more comprehensively on tourism development. As their efforts go forward, it is important to ensure continued representation from across the corridor and that the destination development strategies are broadly supported and prioritized.

4. It is critical there is enhanced collaboration and cooperation amongst all public and private stakeholders to ensure efforts across industries are focused on highest and best use of resources and to ensure that efforts within the tourism sector are focused on 'growing the tourism pie' for the benefit of all rather than competing internally.

5. Reliable access to the planning area is essential. Large urban population centres are a significant distance away. Road safety and road maintenance (particularly in winter) on all routes is fundamental to success. As travellers consider alternate, 'green' modes of travel, road shoulder widening for bicycles and electric vehicle charging stations must be considered. Air access must be convenient, reliable and affordable.

6. Significant investment has been made by the Provincial Government to improve the Highway 3 road conditions, with further investments planned. Yet within the next decade, the road will remain a windy, more scenic route compared to the other east-west option of taking Highway 5. Any planning must recognize the type of traveller that will be attracted to a slower, more scenic driving route and

ensure the experience reflects their needs and interests, e.g., rest areas and reasons to stop along the way.

7. The slower pace of Highway 3, and the lifestyle the communities along it enable, offer a way for visitors to unplug, unwind, and rejuvenate and reconnect. However, this needs to be balanced with providing the services visitors expect and desire. The balance of retaining the 'small-town' charm and local way of life with the growth and development needed for new experiences and infrastructure must be considered.

8. Ease of movement and connectivity *within* the planning area is also important. Shuttle services between airports and destinations, between towns and nearby attractions/activities and between communities will enhance the density of visitor experiences that can be readily accessed and thereby enhance the appeal of the destination.

9. Telling a unified "story" of the corridor in a compelling way that resonates with visitors is seen as a requirement. The entire corridor encompasses a wide variety of activities, attractions and amenities, yet there are gaps along the route (geographically/time distance). An approach that identifies themes to develop along the route so that travellers could pick and choose the experiences that apeal to their unique travel motivations and interests would be beneficial. A strong focus on learning experiences will ensure alignment to the EQ segmentation already transpiring within tourism businesses, Regional DMOs and Destination BC.

10. There is significant opportunity to fill capacity in the off-peak season and increase the utilization of existing and planned infrastructure and assets. A strong focus on developing the destination in a way that attracts visitation and business between October and May has to be a key priority for the summer destinations, and the spring and fall for the destinations with strong winter product.

11. Overnight stays are important to ensure any visitor economy is maximizing its potential. Highway 3 development must consider a range of unique and appealing resorts and independent options that entice the traveller to stay longer and spend more.

12. There are opportunities to improve local government and community support of tourism and tourism businesses. Resident support is an important part of the development of the destination, yet not everyone understands what tourism is, the benefits and the support needed. The development opportunities that drive incremental visitations need to be supported by government and residents, as well as the tourism industry and stakeholders.

13. Due to the diversity of outdoor adventure activities, there are numerous potential issues that could curtail growth in any one area. Potential barriers include land access challenges (tenure to other sectors), government regulatory requirements, BC Parks' budgets which impact maintenance, and

infrastructure and climate change impacts (e.g., extensive winter products and seven ecological climate zones).

14. Physical limitations of people with mobility challenges and the aging population may require businesses and organizations to address potential accessibility concerns. It is important for Highway 3 to offer a range of product offerings to ensure interests meet the broad interests and physical limitations of all travellers.

15. Trails are a significant motivator for the Highway 3 experiences, with strong community support and robust planning work, strategies and actions being implemented. These efforts should continue to be enhanced and supported.

16. Significant opportunity exists to enhance the Aboriginal cultural product and experience. It is widely recognized that the Aboriginal tourism development needs to come from the First Nation and Metis communities. There is interest to support Aboriginal experiences as part of a destination stay.

17. The planning area has some solid heritage product, as well as a growing depth of arts and culture products and experiences. These enhance the overall planning area and support longer stays. However, destination success requires that these experiences collaborate and cooperate to create a depth and density that will motivate travel.

18. Similarly, the planning area has a growing agriculture, agri-tourism, culinary scene (craft breweries, locally sourced, organic menus etc.) but these experiences individually are too isolated and limited to truly contribute to destination growth. Collaboration and cooperation to create a depth and density of experiences to motivate travel is needed.

19. There are many existing, successful festivals and events, however the roster across communities is not well coordinated, which creates conflicts around dates. Many events are at capacity, in terms of footprint, resources and volunteer capacity. Yet there is significant potential to enhance the year-round visitation from festivals and events, and support the strengths of the destination as well as benefits for residents.

20. There are significant human resource challenges that need to be addressed, including access to adequate, skilled staff (including potential need for foreign workers), affordable training programs to enhance skill levels and an inventory of affordable housing in which staff or fledging entrepreneurs can live. These factors are critical elements to business success and the ability to enhance the visitor experience. go2HR can be a valuable resource to assist in HR related plans and strategies.

21. There is a lack of comprehensive economic, industry and consumer information specific to Highway 3 to help make informed business decisions. Effort needs to be expended to develop a set of robust

baseline information and data, then continue to capture and share research and performance measurement on an ongoing basis.

22. Lack of sufficient investment climate and business support is considered a constraint to tourism growth. Business support includes handholding through processes and approvals, mentoring, business plan and grant assistance, etc. This includes a need of understanding of the value of tourism to assist with investment and attraction climate and increase importance of sector in all levels.

23. There are many policy decisions that impact the overall visitor experience and opportunities for growth, including renewal of RMI program, greater flexibility for agri-tourism on ALR, short term rentals, BC Parks policies (e.g., camping capacity, new services), land use policies (e.g., shared use agreements between motorized/non-motorized users), and forest harvesting policies (e.g., scenic viewscape maintenance). Destination development strategies need to identify the potential policies that need review to minimize barriers to growth.

2 INTRODUCTION

2.1 Program Overview

Destination BC is offering destination development planning assistance to support the ongoing viability of BC's tourism sector. The Destination Development Program (Program) is a critical part of Destination BC's corporate strategy and will facilitate the collaboration of local, regional and provincial agencies, First Nations, destination marketing organizations (DMOs), tourism operators and other community interests to guide the long-term growth of tourism experiences and revenues.

The Program will provide strategic direction to address two fundamental needs of BC's tourism industry:

- Increase tourism to BC's communities by improving their attractiveness as 'destinations' for visitors, and
- Align tourism development efforts of individual communities and regions with a provincial strategy to avoid duplication of effort, improve impact and increase the effectiveness of all tourism investments.

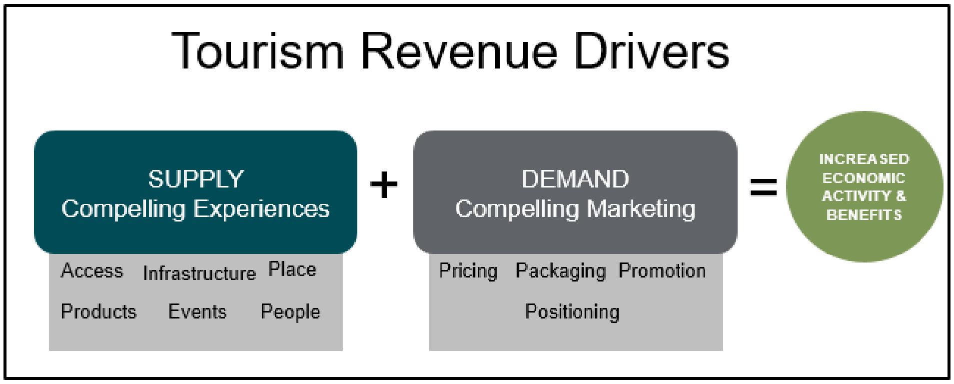
Destination BC has completed extensive consultation to gather input into the program and the process, including from across the Provincial Government and regional tourism associations and business advisors. It has been designed to be fueled by consumer insights and behaviors, considering the unique needs of the tourism regions, while using a semi-standardized planning process to ensure it can all roll up into a single provincial strategy.

So, what is destination development? As far as tourism theory goes, every destination has a natural life cycle. A destination's appeal will naturally decline when one of these things happen:

- A destination deteriorates beyond saleable levels (e.g. lack of investment, aging infrastructure and businesses),
- Consumer needs change to a point of a destination becoming irrelevant (e.g., non-responsive to visitors),
- Political decisions (e.g., government policy change),
- Competition, or
- Things beyond our control (e.g., value of dollar, pan endemic illness, government).

Destination development is the mechanism where that natural life cycle is managed to ensure a destination evolves to remain "desirable" for the ever-changing consumer. Destination development happens when industry and government plan to enhance the quality of the visitor's experience by ensuring tourism services, amenities and practices meet and exceed visitor expectations.

Tourism has two primary revenue drivers – supply and demand. Compelling marketing efforts strive to create short-term demand for a destination and create immediate urgency for people to want to visit. Destination development focuses solely on the supply side of tourism by providing compelling experiences, quality infrastructure and remarkable service to entice repeat visitation and recommendations. Components of destination development include: industry development (training, HR); policy; infrastructure; product development; access, transportation, signage, and wayfinding; investment and funding; business operating conditions (e.g. insurance, permitting etc.); destination management; community planning, and sustainability.



The benefits of destination development include:

- Create a clear 'road-map' for the destination,
- Leverage the strength of the destination as seen by the visitor,
- Identify opportunities and challenges,
- Establish a joint vision that will direct development activity in a range of areas,
- Establish priorities and align investments to grow the visitor economy, and
- Establish the basis for joint action and inter-community dialogue.

Destination Development Strategies will not:

- Duplicate ongoing efforts or create new organizational structures,
- Create new administrative organizations or governance models,
- Create marketing, branding and market position plans,
- Commit or guarantee access to funding for identified priorities, or
- Commit or guarantee changes to identified policy or government programs.

2.2 Planning Process

The following planning process was followed to ensure this plan was developed based on a thoughtful process with consistent participation from a diverse group of industry partners that impact tourism either directly or indirectly. The process follows a semi-structured design by Destination BC that was customized specifically for Highway 3.

Complete

1. Session 1 - Kick-off and working sessions with representative stakeholders

   a. Introduced the program, engaged stakeholders and began to gather information that helped in understanding the context of the destination.
   b. Reviewed the operating context and captured participants input on markets, destination assessment, constraints and opportunities.
   c. Meetings: Manning Park (December 13), Osoyoos (December 15), Cranbrook (January 4) and webinar for the West Kootenays (January 6).
2. Review of planning area reports, strategies, plans and other information
   a. For a full list of documents that have been reviewed as part of this process, see Appendix 9.1.
3. Stakeholder interviews and site visits
   a. Stakeholder interviews were conducted to develop a deeper understanding of the operating context, constraints and opportunities.
   b. Site visits were conducted to engage front line staff and contribute to the assessment of the destination - understanding first hand what makes the Highway 3 corridor a unique and special place to visit, as well as experiencing some of the challenges and opportunities.
4. Industry Engagement
   a. Stakeholders were engaged in the process through a survey to validate and provide further input into the constraints and opportunities identified in Session 1. There were over 70 survey responses from over 400 invites.

Upcoming

1. Session 2 in February, 2017
   a. Review the planning considerations and develop a shared vision, goals and identify destination development themes: Creston (February 7), Osoyoos (Feb 9), Webinar all areas (Feb 15), Hope (Feb 16).
2. Session 3 – Working Committee in March and April 2017
   a. A smaller Working Committee will continue to draft the strategies and provide recommendations.
3. Industry Engagement
   a. Stakeholders will be invited to participate in a survey to validate and provide further input into the vision, goals and development themes that will be identified in Session 2.
   b. Stakeholders will be invited to provide feedback on the draft strategy and draft plan.

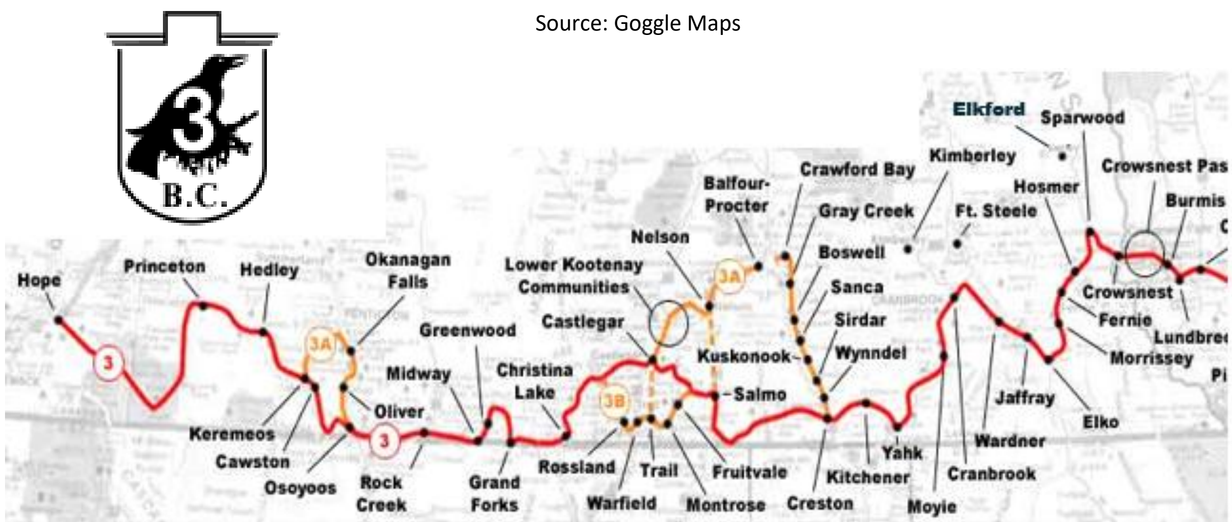
2.3 Highway 3 Planning Area Description

1. Map and Geography

The Highway 3 planning area (including Highway 3A, 3B and 43) stretches east-west from Hope along 838 km of mountainous roads, through Manning Provincial Park, Princeton, Hedley, Keremeos, Olalla, Cawston, Okanagan Falls, Oliver, Osoyoos, Rock Creek, Midway, Greenwood, Grand Forks, Christina Lake, Nancy Greene Provincial Park, Rossland, Warfield, Trail, Montrose, Fruitvale, Castlegar, Nelson, Balfour-Procter, Crawford Bay, Boswell, Sanca, Kuskonook, Sirdar, Wynndel, Salmo, Creston, Kitchener, Yahk, Moyie, Cranbrook, Kimberley, Ft. Steele, Wardner, Jaffray, Elko, Morrissey, Fernie, Hosmer, Elkford, Sparwood and reaching the boundary with Alberta at Crowsnest Pass. Highway 3 in its entirety is referred to as the Crowsnest Highway; it stretches from Hope, BC to Medicine Hat, Alberta over 1,161 km. Within BC, Highway 3 is also known as the Southern Trans-Provincial Highway and Highway 43 is known as the Elk Valley Highway. Highway 3A is in two segments, the first is the Castlegar-Nelson-Creston Highway, where a ferry takes Highway 3A across Kootenay Lake to Kootenay Bay and the second is the Keremeos-Kalden Junction Highway. Highway 3B is an alternate loop to the Crowsnest Highway between Nancy Greene Lake and Meadows. (Figure 1)

Figure 1: Maps – Highway 3 Planning Area

Source: Goggle Maps



Source: http://www.crowsnest-highway.ca/map.htm

These highways encompass the jurisdictions of the Fraser Valley Regional District, Regional District of Okanagan-Similkameen, the Regional District of Kootenay Boundary, the Regional District of Central Kootenay, and the Regional District of East Kootenay.[4] For maps on the regional boundaries, see Appendix 9.2.

[4] http://www.crowsnest-highway.ca/#1 and https://en.wikipedia.org/wiki/Crowsnest_Highway

Highway 3 travels through mountainous regions, forests and along lakes. There are several significant ascents, including: Allison Pass (elevation of 1,342 m), Sunday Summit (1,284 m), Bonanza Pass (1,535 m) Kootenay Pass (1,774m) and ending at Crowsnest Pass (1,358 m).[5]

2. Prominent Communities

Highway 3 travels through several First Nations[6] (and various Bands), that of the Stó:lō Nation, Sinixt Nation[7] (Castlegar), Okanagan (Syilx) Nation[8], Yale First Nation (Independent) and the Ktunaxa Nation[9]. Maps of the Nations are provided in Appendix 9.3.

The Stó:lō Nation traditional territory is included in the Highway 3 planning area from Hope to Manning Park. The Stó:lō Nation includes 11 Bands: Aitchelitz First Nation, Leq' A: Mel First Nation, Matsqui First Nation, Popkum First Nation, Shxwhà:Y Village, Skawahlook First Nation, Skowkale First Nation, Squiala First Nation, Sumas First Nation, Tzeachten First Nation, And Yakweakwioose First Nation.

The Okanagan (Syilx) Nation includes the following Bands:

- Osoyoos Indian Band
- Lower Similkameen Indian Band (Keremeos):
  - Keremeos Forks Indian Reserve Nos. 12 & 12A and
  - Alexis Indian Reserve No. 9
- Upper Similkameen Indian Band:
  - Vermilion Forks Indian Reserve No. 1 (Princeton)
  - Chuchuwayha 2 Indian Reserve (Hedley)

The Ktunaxa Nation includes the following Bands:

- ʔaq̓am – St. Mary's First Nation (Cranbrook)
- yaqan nuykiy – Lower Kootenay Indian Band (Creston)
- ?Akisq'nuk/Columbia Lake First Nation (near Windermere)
- Tobacco Plains Indian Band (Grasmere)

The Sinixt First Nation (Arrow Lakes people), although declared extinct by the Federal government in 1956 are currently pursuing a reversal of this decision. Sinixt traditional territory also includes the Highway 3 planning area.

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[5] http://www2.gov.bc.ca/gov/content/transportation/driving-and-cycling/traveller-information/routes-and-driving-conditions/elevations
[6] https://www.bced.gov.bc.ca/abed/map.htm
[7] http://sinixtnation.org/content/about-us and http://sinixt.kics.bc.ca/history.html
[8] http://www.okanaganfirstpeoples.ca/bands.cfm and http://www.syilx.org
[9] http://www.ktunaxa.org

Highway 3 also travels through:

- Three district municipalities: Hope, Sparwood and Elkford;
- Nine cities: Castlegar, Cranbrook, Fernie, Greenwood, Grand Forks, Nelson, Trail, Rossland, Kimberley;
- Five towns: Princeton, Osoyoos, Creston, Elko, Oliver;
- Seven villages: Keremeos, Midway, Salmo, Warfield, Montrose, Fruitvale, Wynndel;
- One heritage town, Ft. Steele (located off Highway 3 on Highway 95);
- One unincorporated settlement, Rock Creek;
- One unincorporated recreational area, Christina Lake, and
- One unincorporated hamlet, Yahk.

Smaller communities include: Hedley, Olalla, Okanagan Falls, Balfour-Procter, Crawford Bay, Boswell, Sanca, Kuskonook, Sirdar, Kitchener, Cawston, Kitchener, Moyie, Wardner, Jaffray, Morrisey and Hosmer.

The City of Cranbrook has the largest community on Highway 3, BC Stats estimates 2015 population at 19,911. The City of Nelson is the second largest with 10,802 residents; followed by the City of Castlegar with 7,953 residents; the City of Trail (7,448); the City of Kimberley (6,746); the District Municipality of Hope (5,714), the Town of Osoyoos (4,796), the Town of Creston (4,744), the Town of Oliver (4,597); the City of Fernie (4,308), the City of Grand Forks (3,936); the District Municipality of Sparwood (3,768) and the City of Rossland (3,575). Some of the smallest communities are the Village of Midway with 655 residents[10] and Crawford Bay with 350 residents.

3. Economy

Historically the communities along Highway 3 were resource based, focusing on forestry, mining (coal, copper, gold, platinum), horticulture, ranching and agriculture.

Several of the communities still rely on:

- Forestry,
- Mining (open pit coal mines in Fernie, copper mining in Princeton, TeckCoal in Elkford), and
- Agriculture (fruit orchards in Osoyoos, fruit and vegetables in Creston, ranching in Princeton).

The communities are attempting to diversify their economies:

- Manufacturing (Hope: Nestle Waters bottling plant; Grand Forks: Mineral Wool; Castlegar: pulp mill, saw mil, ore smelter; Princeton: Weyerhaeuser saw mill; Creston: Kokanee Beer plant).
- Viticulture (Osoyoos, Oliver and Creston). According to the British Columbia Wine Institute (BCWI), there are five wine regions (designated viticultural areas) in BC; Highway 3 travels through two of them, the Okanagan Valley and the Similkameen Valley.

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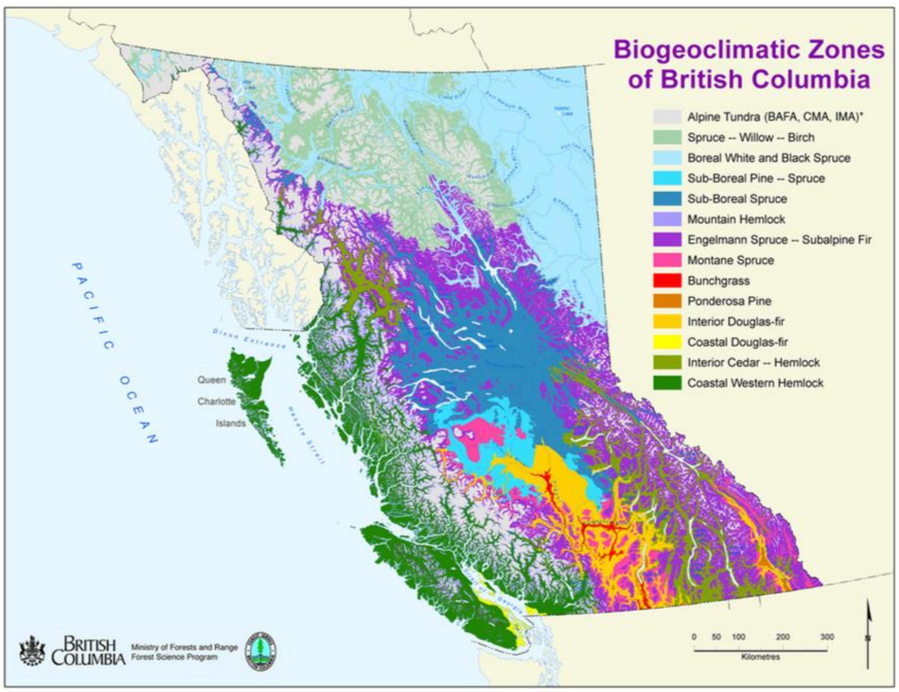
[10] BC Stats, 2015 Population estimates http://www.bcstats.gov.bc.ca/statisticsbysubject/demography/populationestimates.aspx

- Tourism (all communities) including agri-tourism, heritage tourism, mining tourism, outdoor recreation, etc. Tourism and recreation opportunities have begun to shift the dependence from resource based to a more diversified economy. Osoyoos, Rossland, Kimberley and Fernie are designated Resort Municipalities.

4. Climate

Communities along Highway 3 are included in seven biogeoclimatic or ecological climate zones (Figure 2).

Figure 2: Maps of the Biogeoclimatic Zones of British Columbia - Including the 7 zones for Highway 3



Source: Ministry of Forests, Lands and Natural Resource Operations

- **Alpine Tundra Zone** occurs on high mountains throughout the province. There is much precipitation variation within the zone but summers are warm relative to the other alpine zones. Most resource use of the Alpine Tundra zone is based on its high recreational and wildlife values. Recreational pursuits include hiking, camping, skiing, snowmobiling, and horseback-riding.
- **The Bunchgrass zone** (BG) occurs from valley bottoms up to elevations between approximately 700 and 1000 m, including the Okanagan Valley. The climate of the BG is characterized by warm to hot, dry summers and moderately cold winters with relatively little snowfall. The BG has high agricultural

capability. Water sports, wildlife viewing, and hiking are popular in the BG because of the warm, dry climate and the water courses and lakes in the major valleys.

- **The Engelmann Spruce — Subalpine Fir zone** (ESSF) is the uppermost forested zone in the southern three-quarters of the interior of British Columbia. The ESSF has a relatively cold, moist, and snowy continental climate. Recreational pursuits in the ESSF include skiing, hiking, mountaineering, hunting, and camping. Many of British Columbia's provincial and national parks include ruggedly scenic parts of the ESSF.
- **The Interior Cedar — Hemlock zone** (ICH) occurs at lower to middle elevations (400-1500 m) of southeastern British Columbia, and includes cool wet winters and warm dry summers. Recreational activities include hiking, skiing, and fishing. Abundant lakes, pondages, and waterways provide ample boating and fishing opportunities.
- **The Interior Douglas-fir zone** (IDF) occupies the rolling and valley terrain of the southern Interior Plateau and southern Rocky Mountain Trench. The IDF has a continental climate characterized by warm, dry summers, a fairly long growing season, and cool winters. Many valuable fishing lakes and hunting areas lie within the zone. It is also admirably suited to hiking and horseback riding. Cross-country skiing is a very popular winter activity in the IDF.
- **The Montane Spruce zone** (MS) extends from the northern limits of the Fraser Plateau to the U.S. border. The MS has a cool climate characterized by cold winters and moderately short, warm summers. The zone is popular for hiking and horseback riding in summer, and cross-country skiing and snowmobiling in winter. Many valuable fishing, camping, and hunting areas lie within the zone.
- **The Ponderosa Pine zone** (PP) occurs as a thin band in the bottoms and/or on lower sidewalls of the valleys of the Similkameen and lower Kettle rivers, Okanagan Lake, and the southern Rocky Mountain Trench. The PP is the driest and, in summer, the warmest forested zone in British Columbia. Winters are cool with light snow cover. Recreational use of the PP includes some spring, fall, and winter hiking and cycling, horseback riding, nature study, and some hunting, fishing, and motorized vehicle riding. Major tourist use occurs along the beaches of some of the main lakes.

5. Key tourism features

There is an abundance of outdoor recreation activities for all seasons, and all communities along Highway 3. Traditional major winter attractions for the area include downhill skiing, snowmobiling, backcountry touring and Nordic skiing. In spring/summer/fall, the combination of many Provincial Parks and associated trail systems offers excellent camping, hiking and biking opportunities. There is abundant freshwater in the planning area that has drawn generations of visitors for summer vacations 'at the lake' as well as those who seek to paddle, kayak, standup paddleboard or experience whitewater runs. Hunting and angling are also pursued by many locals and visitors with angling opportunities throughout the many lakes and rivers in the planning area.

Each community has sports facilities, such as: recreation complex's, curling clubs, Nordic clubs/centres, hockey arenas and aquatic centres.

The whole eastern portion of the Highway is also known as the Crown of the Continent and communities have embraced geotourism, which is defined as "tourism that sustains or enhances the geographical character of a place - its environment, culture, aesthetics, heritage, and the well-being of its residents."[11] This is applicable to all communities along Highway 3.

There are a significant amount of Provincial Parks along the Highway 3 corridor that offer water and land based activities as well as camping.

Provincial Parks

- E.C. Manning Provincial Park (between Hope and Princeton)
- Coquihalla Canyon Provincial Park (near Hope)
- Nicolum River Provincial Park (hear Hope)
- Silver Creek Provincial Park (near Hope)
- Skagit Valley Provincial Park (near Hope)
- Bromley Rock Provincial Park (near Hedley)
- Stemwinder Provincial Park (near Hedley)
- Sw̓iw̓s Provincial Park (near Osoyoos)
- Johnstone Creek Provincial Park (between Osoyoos and Midway)
- Boundary Creek Provincial Park (near Greenwood)
- Boothman's Oxbow Provincial Park (near Grand Forks)
- Gilpin Grasslands Provincial Park (near Grand Forks)
- Christina Lake Provincial Park
- Nancy Greene Provincial Park (between Rossland and Castlegar)
- Syringa Provincial Park (near Castlegar)
- Champion Lakes Provincial Park (near Castlegar)
- Kokanee Creek Provincial Park (near Castlegar)
- Arrow Lakes Provincial Park (near Castlegar)
- Rosebery Provincial Park (near Castlegar)
- Mcdonald Creek Provincial Park (near Castlegar)
- Erie Creek Provincial Park (near Salmo)
- Stagleap Provincial Park (between Salmo and Creston)
- Yahk Provincial Park
- Ryan Provincial Park (near Yahk)
- Moyie Lake Provincial Park
- Jimsmith Lake Provincial Park (near Cranbrook)
- Top of the World Provincial Park (near Cranbrook)

[11] http://tourismfernie.com/about

- Kikomun Creek Provincial Park (near Cranbrook)
- Norbury Lake Provincial Park (near Cranbrook)
- Wasa Lake Provincial Park (near Cranbrook)
- Wardner Provincial Park (between Cranbrook and Elko)
- Elko Provincial Park
- Morrissey Provincial Park
- Mount Fernie Provincial Park
- Akamina Kishinena Provincial Park (near Fernie)
- Elk Valley Provincial Park (near Fernie)
- Cathedral Lakes Provincial Park (near Keremeos)
- Cathederal Provincial Park (near Hedley)
- Keremeos Columns Provincial Park (near Olalla)
- sx̌ʷəx̌ʷnitkʷ Provincial Park (Okanagan Falls)
- Christie Memorial Provincial Park (south shoreline of Skaha Lake)
- Vaseux Lake Provincial Park
- Inkaneep Provincial Park (near Oliver)
- Elk Lakes Provincial Park (near Elkford)
- Kootenay Lake Provincial Park
- Lockhart Creek Provincial Park (near Kootenay Bay)
- Pilot Bay Provincial Park (near Kootenay Bay)
- Beaver Creek Provincial park (near Trail)
- Kianuko Provincial Park (near Boswell)
- West Arm Provincial Park (near Nelson)
- Kokanee Creek Provincial Park (near Nelson)
- Grohman Narrows Provincial Park (near Nelson)
- King George VI Provincial Park (near Trail)
- Crowsnest Provincial Park

Other Parks

- Hope's Friendship Garden and Greenwood's O-Hairi Park, are dedicated to the Japanese-Canadians who were interned during World War II.
- Memorial Park occupies roughly 7 acres (28,000 m^2) in the heart of Hope.
- Lotzkar Memorial Park (Greenwood) showcases a well-preserved industrial smelter ruin.
- Cranbrook Community Forest encompasses 2000 hectares of crown forest land on the east and north boundary of the City of Cranbrook. Since 1987 it has received provincial protection.
- Zuckerberg Island Heritage Park (near Castlegar).
- Elizabeth Lake Bird Sanctuary (Cranbrook).
- Creston Valley Wildlife Management Area.

- Centennial Park (Creston).

Outdoor recreation - Land based

- Scenic drives (all along the Highway plus the Phoenix Interpretive Forest near Greenwood)
- Trans-Canada Trail, including The Kettle Valley Rail Trail (Midway), Ancient Cottonwood Trail (Fernie)
- Walking tours (historic downtown districts, Irrigation Canal Walkway in Osoyoos)
- Wildlife viewing
- Horseback riding
- Hiking (and trail running)
- Cycling
- Mountain Biking
- Camping
- Hunting
- Golf (Hope: Rock Creek Golf Course; Cranbrook: Mission Hills Golf Course; Kootenay Golf Courses: Castlegar Golf Club, Little Bear Golf Course, Rossland-Trail Country Club, Salmo Golf Club, Champion Lakes Golf & Country, Valley View Golf Club, Kaslo Golf And Country Club, Granite Point Resort, Balfour Golf Club, Kokanee Springs Golf Resort, Riondel Golf Course, Fernie Golf & Country Club; Osoyoos Golf Club; Creston Golf Club; Salmo Golf Club; Keremeos: Twin Lakes Golf course; Kettle Valley Golf Club near Midway; Mountain Meadows Golf Course (Elkford)
- Rock climbing

Outdoor recreation - Winter

- Alpine Skiing and snowboarding (Phoenix Mountain Ski Hill, Kimberley Alpine Resort near Cranbrook, Fernie Alpine Resort, Red Mountain Resort, Whitewater Ski Resort, Manning Park Resort; Salmo Ski Hill, Apex Mountain Resort near Keremeos, Mt. Baldy Ski Area near Osoyoos and Midway, Wapiti Ski Hill near Elkford)
- Nordic Skiing (Paulson Trails near Castlegar, South Star Recreation Trails, Kimberley Nordic Centre; Fernie Nordic Club, Blackjack Nordic Club near Rossland, Island Lake Lodge, Manning Park Resort; China Ridge Trails near Princeton; Apex Mountain Resort near Keremeos; Mt. Baldy Ski Area near Osoyoos and Midway)
- Cat Skiing, Heli-Skiing and backcountry skiing
- Snowshoeing (E.C. Manning Provincial Park, Cranbrook: Top of the World Provincial Park, South Star Recreation Trails, Kimberley Alpine Resort and Lakit Lookout; Fernie: Fernie Alpine Resort, Island Lake)
- Snowmobiling – Hope, Sunshine Valley, Manning Park, Princeton, Fernie, Nelson, Castlegar

Outdoor recreation - Water based

- Swimming (warmest freshwater lake in Canada is Osoyoos Lake, Kettle River, Millenium Ponds in Castlegar)

- Fishing and Boating (Jewel Lake and Marshall Lake near Greenwood, Syringa National Park near Castlegar, Kootenay River, Kootenay Lake, Lower Arrow Lake, Nancy Green Lake, Kootenay Lake (West arm), Champion Lakes; near Cranbrook: Koocanusa Reservoir, Surveyor's Lake, Munroe Lake, Premier Lake, Whiteswan Lake, Moyie Lake, Wasa Lake; Erie Lake near Salmo)
- Kayaking and Canoeing (Kootenay River; Kettle River; Columbia River; Similkameen River; near Cranbrook: St. Mary River, Surveyor's Lake, Munroe Lake, Lazy Lake, St Marys Lake, Norbury Lake, Premier Lake, Whiteswan Lake, Moyie Lake, Jim Smith Lake, Wasa Lake
- River Rafting (St. Mary River near Cranbrook)
- Whitewater rafting (Elk River in Fernie)
- Tubing (Kettle River - Midway)
- Hot Springs: St. Leon Hot Springs near Castlegar; Lussier Hot Springs and Dewar Creek Hot Springs near Cranbrook, Sulphur Springs near Elkford)

Arts and Culture

The planning area also benefits from a signficant artistic community, interesting heritage attractions and many festivals/events. Hope holds the unique Chainsaw Carvings. Osoyoos has a growing arts community. Many towns, like Hedley and Greenwood, have interesting local museums and heritage buildings. Castlegar, with its unique Doukhobour heritage also has a thriving arts community and has developed a market niche with its annual Sculpturewalk now expanding to nearby communities. Creston's expansive valley offers unique wildlife viewing and birdwatching opportunities as well as growing agri-tourism experiences. Crawford Bay on the east shore of Kootenay Lake has become well known for its artisan community and Nelson offers a density of arts, culture, unique retail shopping and interesting dining that motivates both regional and longer-haul travel. Trail's italian heritage and interesting stairways and covered walkways offer additional cultural texture to the planning area.

- Numerous Festivals and events are held through the year in all communities along Highway 3.
- Art galleries:
    - The Hope Arts Gallery exhibits and sells a variety of art by local artists
    - Grand Forks Gallery 2 Art and Heritage Centre
    - Kootenay Gallery of Art (Castlegar)
    - Mirja Vahala Art Studio (Castlegar)
    - Cranbrook Arts
    - The Arts Station (Fernie)
    - Osoyoos Art Gallery
    - Kunze Gallery (Creston)
    - Creston Valley Art Walk and Galleries
    - Sparwood's mural art depticting mining scenes
    - Hope's Chainsaw Carvings (Chainsaw Carving Capital)
    - Selkirk Weavers' & Spinners' Guild Studio Gift Shop (Castlegar)

- Centre 64 (Kimberley Arts Centre)
  - Rossland Potters' Guild
  - Artisans of Crawford Bay
- Theatre:
  - Cranbrook Community Theatre
  - Key City Theatre (Cranbrook)
  - Footlighters Theatre Society (Creston)
  - Oliver Theatre
  - Rossland Light Opera Players
  - Charles Bailey Theatre (Trail)
- Museums and Heritage Centres:
  - Hope Museum
  - Creston Museum
  - Greenwood Museum
  - Grand Forks Museum
  - Osyoos Museum
  - Salmo Museum
  - Princeton and District Museum and Archives
  - Keremeos Museum
  - Historic Grist Mill & Gardens (Keremeos)
  - Kettle Valley Museum (Midway)
  - Fernie Museum and Historical Society
  - Fernie Heritage Library
  - Canadian Museum of Rail Travel (Cranbrook)
  - Cranbrook History Centre
  - Ktunaxa Interpretive Centre (Cranbrook)
  - Boundary Museum and Interpretive Centre - history of the Doukhobor people in Grand Forks.
  - Doukhobour Discovery Centre (Castlegar)
  - Nk'Mip Desert & Heritage Centre (Osoyoos)
  - Station Musuem (Castlegar)
  - The USCC Cultural Interpretive Society Gift Shop (Castlegar)
  - Fort Steele Heritage Town (near Cranbrook)
  - Princeton Castle
  - Heritage buildings (Greenwood)
  - Trail Museum
  - Touchstones Nelson
  - Rossland Museum
  - Oliver Museum
  - Hedley Heritage Museum

- Mascot Mine Museum (Hedley)

- Craft Breweries/Wineries:
    - Baillie Grohman Estate Winery – Creston
    - Skimmerhorn Winery and Vineyard – Creston
    - Wynnwood Cellars – Creston
    - William Tell Family Estate - Creston
    - Heron Ridge Estates – Castlegar
    - Columbia Gardens Vineyard & Winery – Trail
    - SOAHC Winery – Trail
    - Nelson Brewing Company - Nelson
    - Torchlight Brewing Company – Nelson
    - Fernie Brewing Company – Fernie
    - Fisher Peak Brewery - Cranbrook
    - Rossland Beer Company – Rossland
    - Similkameen Valley has 18 licensed Wineries
    - Okanagan Valley has 174 licensed Wineries: Oliver – 38; Osoyoos – 9; Okanagan Falls – 12 licensed Wineries

Resorts

- Jewel Lake Resort
- Prestige Rocky Mountain Resort (Cranbrook)
- St. Eugene Golf Resort and Casino (Cranbrook)
- Fernie Alpine Resort
- Manning Park Resort
- Kokanee Springs Golf Resort
- Apex Mountain Resort (near Keremeos)
- Red Mountain Resort (Rossland)
- Whitewater Ski Resort (Nelson)
- Kimberley Alpine Resort
- Baldy Mountain Resort (Oliver)

Other Sites/Activities

- Hope Slide - one of the largest landslides ever recorded in Canada.
- Othello Tunnels - a series of five tunnels near Hope originally built for railway access, and now part of the Trans Canada Trail system.
- Sparwood is home to the Terex Titan, at one time the largest truck in the world.
- Exploring abondoned mines around Greenwood.
- Exploring ghost towns in the Princeton area.

- Brilliant Suspension Bridge (Castlegar)
- Kootenay Trout Hatchery (near Cranbrook)
- Nip and Tuck Gold Mining Adventure (near Cranbrook)
- Ascent Helicopters (Fernie)
- Osyoos Desert Centre
- The Glass House (Creston)
- Stone Murals (Salmo)
- World's largest penny (Salmo)
- Keremeos Elks Rodeo
- Keremeos Columns
- Grist Mill and Gardens (Keremeos)

6. Transportation /Access

Communities along Highway 3 are accessible by motor vehicles (bikes, car, motorcoach etc.). The District Municipality of Hope is also accessible by railway (VIA Rail Canada) and the Grand Forks Railway (which links to the Kettle Falls International Railway which goes to the United States). The Burlington Northern Intermodal Railway connects Osoyoos to the Port of Vancouver.

Several communities along Highway 3 are accessible by air including, Hope Airport/Aerodrome, Midway Aerodrome, West Kootenay Regional Airport (Castlegar), Sparwood/Elk Valley Airport, Cranbrook/Canadian Rockies International Airport, Trail Regional Airport, Oliver Airport, Nelson Airport, and Grand Forks Airport.

In-destination transportation includes car rentals, taxi's and public transit.

7. Visitor Services

There are visitor centres in Hope, Sparwood, Cranbrook, Castlegar, Rossland, Kimberley, Trail, Nelson, Elkford, Hedley, Oliver, Fernie, Christina Lake, Greenwood, Grand Forks, Osoyoos and Creston that provide visitor information, assistance and advice.

Many of the visitor centres provide visitor services beyond their centres, including mobile roaming vehicles, ambassador street teams and social media information services.

8. Communications/Technology

Communities along Highway 3 (particularly Hope and Creston Valley) have seen significant upgrades to the communications and technology infrastructure, including investments in faster, more reliable broadband internet access/fiber-optic. Cell service is available in all the cities, towns, municipalities etc., however there are large areas along the highway (between communities) without coverage.

3 BC'S HIGHWAY #3 MAYORS AND CHAIRS COALITION

The Highway #3 Mayors and Chairs Coalition is comprised of local government elected officials from the majority of communities and regional districts located on the Crowsnest Highway corridor from Hope to the Alberta border (Highways 3, 3A, and 3B).

The Coalition created a subcommittee working group to undertake initiatives to develop and market the Crowsnest Highway corridor as a prime route for travelers: "Refreshing the messaging and promoting the route more actively will help change the perceptions of travelers which will generate increased visitation, length of stay and visitors' spending, and thus benefit the economy of all the communities located along the route." The group is also highly interested in exploring the opportunity electric vehicle travel could provide for this corridor.

The subcommittee consists of elected members of the coalition and tourism professionals from Kootenay Rockies Tourism, Tourism Rossland and the Thompson Okanagan Tourism Association (TOTA).[12]

The purpose of this subcommittee is to create and oversee a multi-year strategy for the development and the marketing of this corridor to create economic opportunities and drive more visitors to the corridor. The Subcommittee developed the following goals, objectives and deliverables:

a. Goals & Objectives

i. Drive traffic to Hwy 3
ii. Brand/common theme/historic route
iii. An attractive route to travel (safe and scenic)
iv. How are we going to get there (electric HWY)?
v. Infrastructure/Experience Design/Branding & Marketing – 3 pillars
vi. Raise awareness, promote as scenic option, encourage more traffic – more stops.

b. Deliverables

i. Asset inventory – attractions, rest areas, charging stations, mapping
ii. Action plans, low hanging fruit
iii. 10-year vision, 3-year action plan
iv. 3-4 stakeholder engagement sessions

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[12] Members of the subcommittee: Chair: Mayor Kathy Moore- City of Rossland; Mayor Lawrence Chernoff- City of Castlegar; Mayor Sue McKortoff- Town of Osoyoos; Mayor Ron Toyota- City of Creston; Councillor Kim Maynard- City of Princeton; Mayor Mary Giuliano- City of Fernie; Mayor Manfred Bauer- Village of Keremeos; Deanne Steven- Executive Director, Tourism Rossland; Emilie Cayer-Huard - Industry & Destination Development Specialist, Kootenay Rockies Tourism; Simone Carlysle-Smith - Industry & Community Development Specialist, Thompson Okanagan Tourism Association. In addition to the tourism professionals, the subcommittee is working with representatives from the Ministry of Transportation and representatives from the economic branch of the Ministry for Jobs, Tourism and Skills Training.

v. Identify target audience
vi. Alignment with goals/objectives with other industry plans – provincial, regional, local
vii. Identify a sustainable funding model
viii. Governance model

After participating in a visioning exercise[13], the subcommittee captured the intent for the future of the Crowsnest Highway #3 Corridor in the following vision statement:

"In 2026, the Crowsnest Highway is recognized as a highly regarded and top of mind scenic route by travelers and residents. It is perceived as safe, well signed, convenient and modern; yet, it offers an authentic and enriching experience for the travelers. The communities along the corridor are collaborating with each other; each of them is resilient, charming, welcoming and economically thriving. The unique and diverse culture, heritage and the natural beauty are preserved and celebrated at every turn."

The goal of the strategy is to develop a ten-year vision with a 3-year action plan that provides a framework for local government, First Nations, community groups, DMOs, RDMOs, Chambers of Commerce, businesses and non-profit groups to work towards shifting the perceptions travelers have of this route. The intent is to improve the experience provided along the corridor and ensure the supporting infrastructure meets or exceeds the visitor's expectations. And, through branding and marketing, to increase awareness and attract more visitors, who will want to stay longer in the communities, experience the unique offerings along the route and who will want to return again and again.

The strategy will include a set of guiding principles and recommendations to ensure the highway benefits from visitation year-round as an important driver of economic development for the surrounding communities and their stakeholders. The strategy will encourage strong partnerships and demonstrate how the implementation will increase overall tourism visitations and spending along the corridor.

The Coalition has a long history of collaboration with the Provincial government and has been successful over the last few years in working with the Ministry of Transportation to complete numerous improvements to the highway, including the addition of passing lanes in critical sections along the corridor, repaving, improved intersections and other safety features for the route.

[13] For details on the Visioning Workshop (June 28th 2016) refer to Appendix 9.9

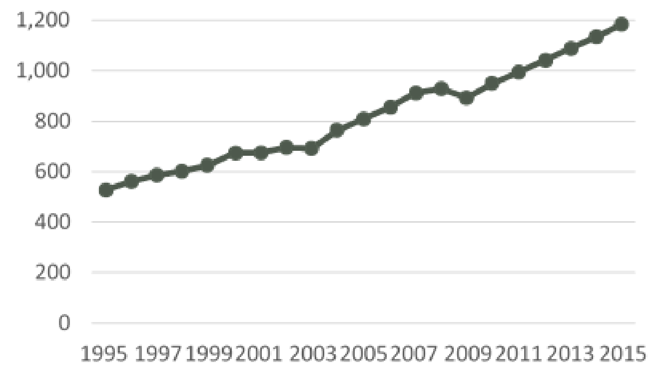
4 TOURISM INDUSTRY CONTEXT

4.1 Global Tourism Performance

Global tourism is one of the largest and fastest-growing economic sectors in the world. 2015 was no exception, with international tourists arrivals (ITAs) growing 4.4% over 2014 to reach 1,184 million. Over the past two decades ITAs have grown 125%. In fact, ITAs have grown by 4% or more every year since 2010. (Figure 3)

In 2015, Europe led growth in ITAs with a 5% increase over 2014. North America saw a 4% increase in ITAs. Arrivals to the Middle East grew about 3% and arrival to Africa declined by 3%.

Figure 3: Global International Tourism Arrivals (Millions), 1995-2015



Source: UNWTO Tourism Highlights, 2015

Spending by tourists follow a similar pattern. In 2015, spending by tourists was estimated to be $1,232 billion US dollars.[14] This represents 3.6% growth over 2014[15] and 25% growth since 2010.

In the long term, growth is expected to continue over the next two decades. According to the UNWTO's Tourism Towards 2030, the number of international tourist arrivals worldwide will increase by an average of 3.3% a year over the period 2010 to 2030.[16] The pace of growth is expected to be higher in the emerging economy destinations like Asia, Latin America, Central and Eastern Europe, the Middle East and Africa (4.4% per year) compared to traditional destinations (2.2% per year). By 2030, more than half (57%) of international arrivals will be captured by emerging economy destinations.

Increasing competition, global security threats, economic conditions, natural disasters, disease outbreaks and border security concerns will continue to concern citizens worldwide and could impact project growth rates.

[14] UNWTO World Tourism Barometer. 2016. United Nations World Tourism Organization.

[15] Growth accounts for exchange rate fluctuations and inflation.

[16] Source: http://media.unwto.org/press-release/2016-01-18/international-tourist-arrivals-4-reach-record-12-billion-2015

4.2 Canadian Tourism Performance

Similar to global economic impacts, tourism is Canada's top service export and is the top employer of young Canadians. Over the past decade, there has been steady growth in the economic performance of the Canadian tourism industry. In 2015, tourism accounted for:[17] [18]

- Almost 17.8 million international overnight visitors (Figure 4),
- 637,000 jobs and 190,000 business establishments in Canada, and
- $16.8 billion in international tourism expenditures.

Figure 4: International Overnight Visitors to Canada

Source: Statistics Canada. Data Table 427-0004

In 2015, almost 12.5 million or 70% of international visitors were from the United States. Other key international markets[19] include the United Kingdom (4% share), France (3% share), Germany (3% share) and Australia (2% share). Markets of emerging/transitional interest are Japan (2% share), South Korea (1% share), Mexico (1% share), Brazil (1% share), China (3% share), and India (1% share). China saw exceptional growth (29%) in 2014 but slower growth in 2015 (9%). In total, Canada's top 11 key markets account for 70% of international overnight visitors. (Figure 5)

Figure 5: Canada's Key Markets, 2015

	Overnight Visitors		
	2015	Percent change over 2014	Share
United States	12,474,500	8%	70%
United Kingdom	715,548	6%	4%
France	500,502	4%	3%
China	493,827	9%	3%
Germany	328,870	1%	2%
Australia	286,906	2%	2%
Japan	275,027	6%	2%
Mexico	196,408	14%	1%
India	190,565	9%	1%
South Korea	188,585	16%	1%
Brazil	112,268	13%	1%
TOTAL	**17,782,949**	**8%**	**70%**

Source: Destination Canada

In the face of these recent increases in international visitor arrivals, Canada has not kept pace with its competitors. Canada's market share of global international tourism arrivals has declined from 2.9% in 2000 to 1.5% in 2014. 2015 marked a reversal in this trend where, Canada grew faster than the global growth rate.

[17] Ambitious Together. 2015 Annual Report. 2016. Destination Canada.
[18] Tourism Snapshot 2015 Year-in-Review. December 2016. Volume 11. Issue 12. 2016. Destination Canada.
[19] As designated by Destination Canada.

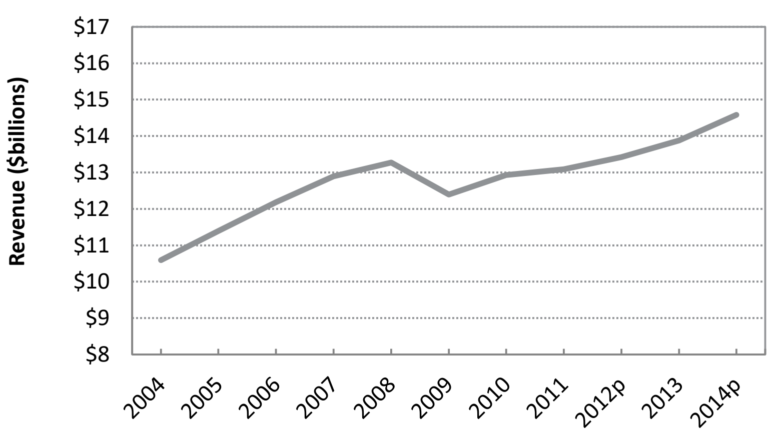
4.3 BC Tourism Performance

4.3.1 Economic Indicators

The BC economy is diverse and evolving. Built on the foundations of the resource sector, the economy now primarily relies on the service industry (including tourism)[20]:

- In 2014, the economy grew by 2.9%, which was the second highest rate among provinces in Canada and above the national average. The tourism industry contributed $7.1 billion of added value to BC's gross domestic product, an increase of 4.5% from 2013. The economy has been projected to continue this growth into 2015.
- In 2014, the tourism industry generated $14.6 billion in revenue, a 5.1% increase from 2013, and a 37.7% increase from 2004. (Figure 6)
- In 2014, Municipal and Regional District Tax (MRDT) revenue grew by +9.0% over 2013 and reached a total of $1.7 billion. The tourism industry contributed $7.1 billion of value added to the BC economy, as measured through GDP (in 2007 constant dollars). This represents 4.5% growth over 2013 and 13.1% growth since 2007.
- In 2014, there were 18,682 tourism-related businesses in BC, down 3.0% from 2013 and up 3.6% from 2004.
- Complimenting this economic growth, unemployment rates dropped 0.5 percentage points from 2013 to 6.1% in 2014, while employment rates increased by 0.6% (led by the goods-producing sector). These changes are indicative of a healthy and growing economy.
- The tourism industry employed 127,500 people in 2014. Tourism-related employment increased by 2.2%, and provides 1 out of every 15 jobs in the province. In 2014, the tourism industry paid $4.3 billion in wages and salaries, up 4.5% from 2013 and a 30.2% increase since 2004.

Figure 6: BC Room Revenues, 2015



BC Stats (2015)

[20] Value of Tourism 2014. A Snapshot of Tourism in BC. 2015. Destination British Columbia.

More recent BC tourism performance indicators demonstrated 2015 was an exceptional year of growth for the BC tourism industry. There was an increase of 8% in total overnight, international visitor arrivals, which was mostly due to almost 10% annual growth in visitation from the United States. Overnight arrivals from Asia/Pacific (5%) and Europe (4%) also grew. Also, BC provincial hotel occupancy rates (up 2.2 points), average daily room rates (up 9%), food service and drinking place receipts (up 7%) and passenger volume to YVR (5%) all showed the strength of the tourism industry in 2015. (Figure 7)

4.3.2 Key Markets

In 2015, there were 18.9 million overnight visitors in BC, those visitors spent about $10.3 billion. Over half of the visitors (55%) were BC residents. Visitors from other parts of Canada accounted for 18% of all visits, another 18% were from the United States while international visitors accounted for the remaining 8% of visitor volume. However, international visitors accounted for 38% of visitor expenditures, while Canadian and BC residents accounted for two-thirds (62%) of expenditures. (Figure 8)

Figure 7: British Columbia Tourism Performance, 2015

	2015 Performance	Percent Change Over 2014
International Visitor Arrivals		
Total Overnight	4,925,916	7.9%
USA Overnight	3,263,395	9.6%
Asia/Pacific	1,049,466	4.5%
Europe	473,166	3.8%
Travel Parties to BC Visitor Centres	1,272,014	-7.4%
Room Revenue ($000)	$2,002,682	15.3%
Provincial Hotel Occupancy Rate (Average)	66.1%	2.2 points
Provincial Average Daily Room Rate	$153	8.8%
Food Services and Drinking Places Receipts	$9,541,000	7.2%
BC Ferries Passengers	20,442,794	4.0%
Total Passenger Volume to YVR	20,316,978	4.9%

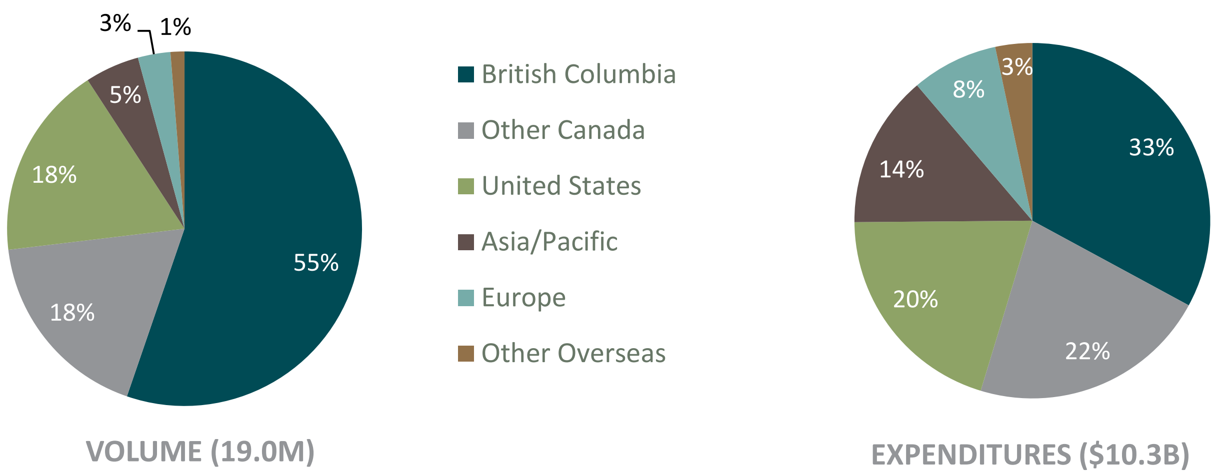
Source: Provincial Tourism Indicators: 2015 Year-to-Date, February 2016. Destination British Columbia.

In 2015, Canadian residents took 13.8 million person-trips within their country where they spent at least one night in BC. These domestic trips generated just over $5.6 billion in expenditures. Travel by Canadian residents decreased 6% between 2013 and 2015, while expenditures have decreased 1%.

- Visitation from Ontario and Alberta has decreased by 11% and 16%, respectively since 2013. Alberta and Ontario resident expenditures have both declined 11% over the same period while expenditures by BC residents have grown by 8%.

In 2015, over 5 million international travellers visited Canada and spent at least one night in BC. These travellers spent $4.6 billion during their trips. Overall international visitation increased 16% between 2013 and 2015, while overall expenditures increased 19%.

Figure 8: BC's Tourism Volume and Expenditure Market, 2015



Source: Destination BC. Values may be subject to revisions as updated data becomes available Domestic estimates are based on a partial year (3/4) of results from the Travel Survey of Residents of Canada. See Appendix 9.3 for more details.

BC Stats (2015)

- The United States is BC's largest international market, accounting for 66% of international visitor volume and 44% of expenditures. Visitation from the US increased 14% between 2013 and 2015 while expenditures increased 16% during the same period. BC's two key US markets – Washington and California – both experienced the same increases in visitation and expenditure. Mexican visitation grew 33% and expenditures grew 37% between 2013 and 2015.
- BC's two key European markets – the United Kingdom and Germany – accounted for 43% and 20% of European visitor volume and 43% and 19% of European expenditures. Both markets have experienced modest growth since 2013; UK visitation increased 5% and German visitation increased 2%. While expenditures also increased by 5% and 6%, respectively.
- BC has five key markets in Asia/Pacific – Australia, China, India, Japan and South Korea. Japanese (28%), Chinese (32%), South Korean (18%) and Indian (30%) visitation increased substantially between 2013 and 2015. Visitation from Australia increased a more modest 7% over the same period. Overall expenditures grew 19% for the Asia/Pacific region in total, the largest gain of all international regions.

4.3.3 Regional Performance and Markets

The Regional Performance chart shows available information to demonstrate performance of the tourism region and Planning Area. (Figure 9)

Figure 9: Regional Performance, 2014 and 2015

		2014	2015	Percent Change over 2014
Travel Parties to BC Visitor Centres	Hope	17,334	17,415	0.5%
	Oliver	7,229	6,440	-10.9%
	Osoyoos	18,414	18,786	2.0%
	Sparwood	20,500	17,265	-15.8%
	Cranbrook	2,980	2,896	-2.8%
	Castlegar	9,233	9,588	3.8%
	Rossland	1,398	1,806	29.2%
	Kimberley	12,330	11,524	-6.5%
	Trail	2,201	2,154	-2.1%
	Nelson	10,358	9,080	-12.3%
	Creston	10,586	9,495	-10.3%
	Fernie	6,842	6,057	-11.5%
	Christina Lake	16,334	15,693	-3.9%
	Greenwood	4,062	4,130	1.7%
	Grand Forks	3,118	2,688	-13.8%
	Elkford	426	475	11.5%
Highway Traffic - Rte 3, W BC/AB Border/Crowsnest Pass		1,647,226	1,640,822	-0.4%
Room revenue ($'000's)				
	Osoyoos	$ 17,083	$ 18,602	8.9%
	Kimberley	$ 4,894	$ 4,347	-11.2%
	East Kootenay-Fernie	$ 15,809	$ 14,297	-9.6%
	Castlegar, Nelson, Rossland	$ 17,687	$ 23,145	30.9%
Passenger Volume to Regional Airports				
	Canadian Rockies	131,669	128,941	2.1%
	Castlegar	77,203	80,045	3.7%

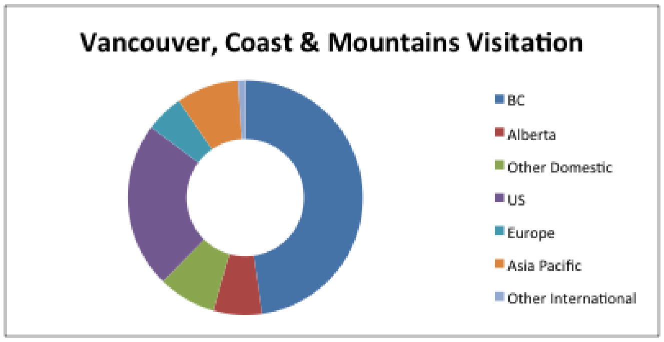
Source: Destination BC, Ministry of Transportation, BC Stats and Ministry of Finance, Castlegar Airport

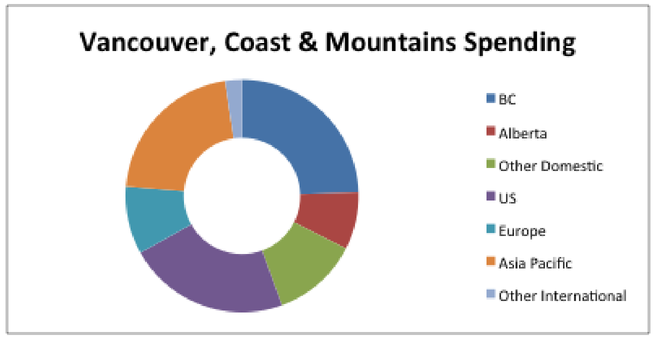
Destination BC Regional Profile

Highway 3 is included in three tourism regions: Vancouver, Coast and Mountains (VCM); Thompson Okanagan (TO) and the Kootenay Rockies (KR).

The Vancouver, Coast and Mountains tourism region has 61% of BC's population at 12,677,617 of which 81,300 are employed in the tourism industry in 81,300 businesses. In 2013, room revenues for the entire region were $978.4 million.[21] The VCM region captured approximately half of overall visitor volume (8.2 million visitors) and expenditures ($4.6 billion in spending). (Figure 10)

Figure 10: Vancouver, Coast and Mountain Visitor Volume and Spending

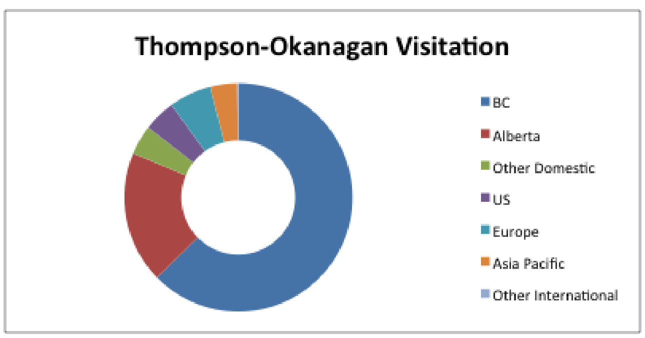


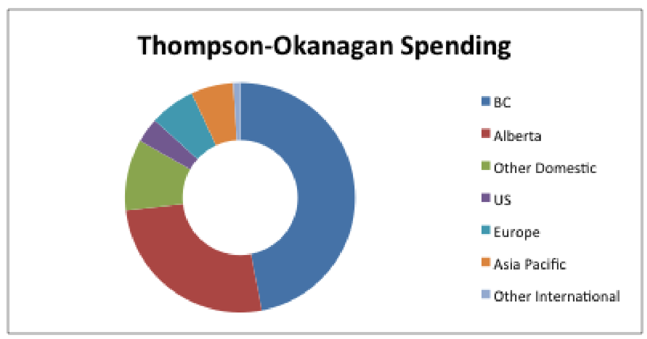


Source: Statistics Canada: 2013-2014 Pooled TSRC, 2014 ITS

The Thompson Okanagan tourism region has 12% of BC's population at 520,803 of which 14,600 are employed in the tourism industry in 2,434 businesses. In 2013, room revenues for the entire region were $978.4 million.[22] Thompson Okanagan was the second most visited region (Figure 11) with 13% of visitor expenditures.

Figure 11: Thompson Okanagan Visitor Volume and Spending





Source: Statistics Canada: 2013-2014 Pooled TSRC, 2014 ITS

In 2012, the entire Kootenay Rockies tourism region received 9% of provincial overnight visitation (1.6 million person visits) and 7% of related spending ($602 million). The region has 3% of BC's population at 146,264 of which 5,700 are employed in the tourism industry in 850 businesses. In 2012, room revenues for the entire region were $188.7 million.[23] The Kootenay Rockies was the fourth most visited region with 12% of visitor expenditures. (Figure 12)

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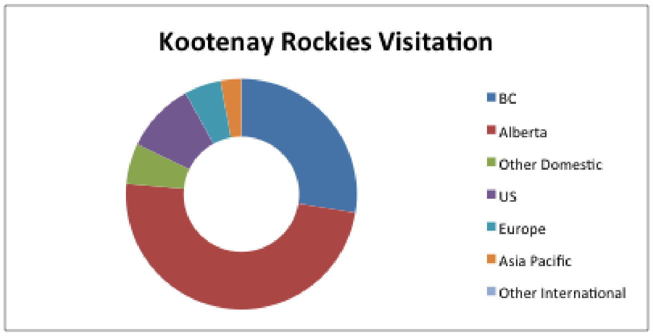
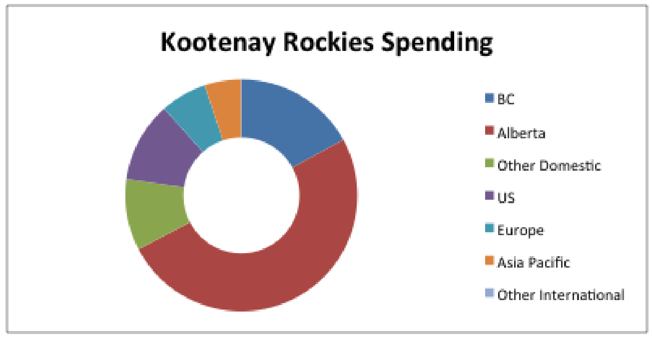
[21] Source: Vancouver, Coast and Mountains Regional Profile (2015), Destination BC.
[22] Source: Vancouver, Thompson Okanagan Regional Profile (2015), Destination BC.
[23] Source: Kootenay Rockies Regional Profile (2015), Destination BC.

Figure 12: Kootenay Rockies Visitor Volume and Spending





Source: Statistics Canada: 2013-2014 Pooled TSRC, 2014 ITS

Key Markets by Region[24]

At the provincial level, Destination BC has produced regional profiles for each of the tourism regions in the province. (Figure 13) The table displays the rank and the proportion of volume and expenditure by tourism region. BC residents formed the largest market of origin across most of the six tourism regions. BC residents accounted for over 60% of visitor volume in the Thompson Okanagan, and just over 40% of visitor volume in VCM. However, BC residents still made up the largest market for the VCM region.

In terms of visitor spending, BC was the top market but BC residents accounted for a smaller proportion of regional expenditures. In the KR, BC slipped to second position behind Alberta. Alberta residents accounted for 52% of regional volume and 50% of regional expenditures, compared to 24% and 22% respectively for BC residents.

Washington was in the top five markets for visitation in VCM, TO, and KR. However, some markets were particularly important for certain regions. Saskatchewan was in the top five for KR and the United Kingdom as an important market for VCM, TO and KR. Ontario featured as a key market for VCM and TO.

The relative importance of the top five markets shifted depending on whether visitor volume or expenditures were used as the base:

- While Washington was ranked second in terms of VCM s visitor volume (10%), it shifted to fourth position in terms of expenditures (6%).
- Based on expenditures, Ontario became the second most important market for VCM.
- Ontario secured third position for TO and Saskatchewan moved to fifth position for KR.

[24] Source: BC Tourism Industry Performance, Regional Visitation – Destination BC (Nov 2015)

Figure 13: Top Five Markets for BC Tourism Regions

Top Five Markets (Rank and Proportion of Regional Total)

			VCM	VI	TOTA	KR	NBC	CCC
By Visitor Volume	Domestic	Alberta	3 6%	3 4%	2 13%	1 52%	2 13%	2 6%
		BC	1 46%	1 66%	1 70%	2 24%	1 69%	1 76%
		Ontario	4 5%	4 3%	4 2%	4 2%		
		Saskatchewan				5 2%		
	United States	Alaska					3 2%	5 2%
		California	5 4%	5 3%			5 1%	
		Washington	2 10%	2 6%	3 3%	3 3%		3 3%
	Overseas	Germany					4 1%	4 2%
		UK			5 1%			
% captured by top 5			65%	81%	87%	83%	83%	89%
By Expenditures	Domestic	Alberta	3 6%	2 10%	2 20%	1 50%	2 20%	4 3%
		BC	1 22%	1 41%	1 53%	2 22%	1 55%	1 67%
		Ontario	2 9%	4 6%	3 4%			
		Saskatchewan				5 2%		
	United States	Alaska					5 1%	
		California		5 4%			3 4%	2 6%
		Washington	4 6%	3 7%	4 3%	3 3%		5 3%
	Overseas	Germany					4 2%	3 3%
		UK	5		5	4		
								82%

Source: BC Tourism Industry Performance, Regional Visitation – Destination BC (Nov 2015)

Domestic travellers accounted for three-fifths of visitor volume and just under half of tourism spending in VCM. In the interior regions – KR, and TO – domestic travellers accounted for a much larger proportion of volume and expenditures.

Americans accounted for about 16% of overall volume and 18% of expenditures in BC. US travellers accounted for 26% of visitation and 22% of expenditures in VCM. In TO and KR, Americans accounted for less than 10% of each region's visitor volume.

4.3.4 Visitor Characteristics

On average, BC residents spent just under three nights during a trip in their home province. BC residents' trips were slightly longer in KR and slightly shorter in VCM. Other Canadian residents spent over five nights during a trip in BC, and trip lengths varied from 3.5 nights in KR up to 5.6 in VCM.

Travel party size was generally consistent for BC and other Canadian residents, averaging 1.6 people per party. Generally, about 15% of travel parties included children under 18 years of age. Among BC residents, this proportion was fairly stable across the regions. For other Canadian residents, the proportion of parties travelling with children varied from 11% for VCM, 17% for TO and 25% for KR.

BC residents spent an average of $130 per travel party per night during their trip. By region, the average trip spending ranged from $110 in TO, $117 in KR to $132 in VCM. Food and beverage tended to account for the largest proportion of trip spending by BC residents, followed by accommodation and vehicle costs (private vehicles or rentals).

Other Canadian residents spent $155 per party per night, on average. This spending ranged from $141 in TO, $154 in KR to $171 per party per night in VCM. While food and beverage remained the largest spending category for other Canadians across most regions, transportation costs – either public transportation or vehicles – were the largest spending categories in VCM.

The following chart shows the Trip Characteristics for Domestic travellers for each tourism region in BC. (Figure 14)

Figure 14: Overnight Trip Characteristics for Domestic Travellers in/to BC

		BC OVERALL	Trip Characteristics by Tourism Region					
			VCM	VI	TOTA	KR	NBC	CCC
BC Residents	Average nights per trip	2.9	2.7	2.8	2.9	3.3	3.0	3.1
	Average party size	1.6	1.5	1.6	1.8	1.8	1.6	1.8
	Parties travelling with kids	15%	14%	15%	18%	16%	17%	18%
	Trip spending (per party per night)	$130	$132	$111	$110	$117	$143	$84
	Spending by category[a]							
	Public transportation[b]	12%	10%	10%	3%	1%	12%	1%
	Vehicle[c]	22%	15%	20%	22%	36%	28%	34%
	Accommodation	23%	26%	22%	26%	18%	25%	24%
	Food & beverage	28%	29%	34%	33%	33%	24%	31%
	Recreation & entertainment	8%	11%	6%	8%	6%	5%	7%
	Retail & other items	8%	10%	8%	8%	6%	6%	4%
Other Canadian Residents	Average nights per trip	5.6	5.6	6.4	4.6	3.5	4.8	7.4
	Average party size	1.6	1.5	1.5	1.7	1.9	1.7	1.7
	Parties travelling with kids	16%	11%	7%	17%	25%	20%	10%
	Trip spending (per party per night)	$155	$171	$156	$141	$154	$129	$125
	Spending by category[a]							
	Public transportation[b]	17%	26%	24%	8%	1%	11%	0%
	Vehicle[c]	14%	8%	14%	16%	21%	23%	51%
	Accommodation	24%	25%	24%	25%	21%	28%	13%
	Food & beverage	28%	25%	25%	31%	32%	28%	27%
	Recreation & entertainment	10%	9%	7%	9%	22%	3%	5%
	Retail & other items	7%	7%	6%	11%	3%	7%	4%

[a] *Spending by category is based on spending per party per night*
[b] *This category includes public and local transportation (plane, bus, boat, train); Canadian air carrier fares removed from data.*
[c] *This category includes the costs of operating private vehicles and/or renting a vehicle.*

4.3.5 Top BC Visitor Experiences

The global travel market is becoming increasingly diverse and segmented. However, most of British Columbia's target consumers share one thing in common: they have an increased desire for travel experiences that express individuality, including travel that offers unique, exotic experiences. There are also travellers who pick their destination based on pre-existing passions and pursuits.

British Columbia's target consumers strongly connect with the unique combination of ocean, rainforest and mountains in British Columbia, as well as the stunning natural beauty and wildlife. Destination BC has identified five iconic experiences that showcase those aspects of British Columbia's consumer brand in a compelling way[25]: Rainforests, Cities in Wilderness, Skiing, Canadian Rockies, Ocean Coast.

Destination BC tracks a number of attributes that describe BC as a destination in an annual consumer research study conducted in target North American markets (BC, AB, WA, CA, ON). Survey respondents are asked to select the destination they most associate with a range of attributes. The following are the top ten attributes that are most associated with British Columbia (in no particular order):

- Has excellent skiing/snowboarding
- Has a unique combination of ocean, mountains and rainforest
- Has beautiful natural scenery
- Has cities in close proximity to nature and wilderness
- Has easily accessible nature and wilderness activities
- Has opportunities to experience aboriginal culture and attractions
- Has lots of opportunity to view wildlife
- Has an incredible diversity of wildlife
- Has lots of great outdoor activities
- Has lots of protected areas, including nature reserves, regional and/or national parks

A specific look by market shows the top activities on a trip to BC by market. (Figure 15)

Figure 15: Top Activities on a Trip to BC

	BC residents	Other Canadians	**US residents	**Other inter-national
1	National, provincial or nature park	National, provincial or nature park	National, provincial or nature park	National, provincial or nature park
2	Camping	Beach	Historic site	Zoo or aquarium
3	Boating/canoeing/ kayaking	Hiking or backpacking	Zoo or aquarium	Museum or art gallery
4	Beach	Museum or art gallery	Museum or art gallery	Historic site
5	Fishing	Historic site	Downhill skiing or snowboarding	Festival or fair

Source: Regional Profile Reports, January 2015, Destination BC

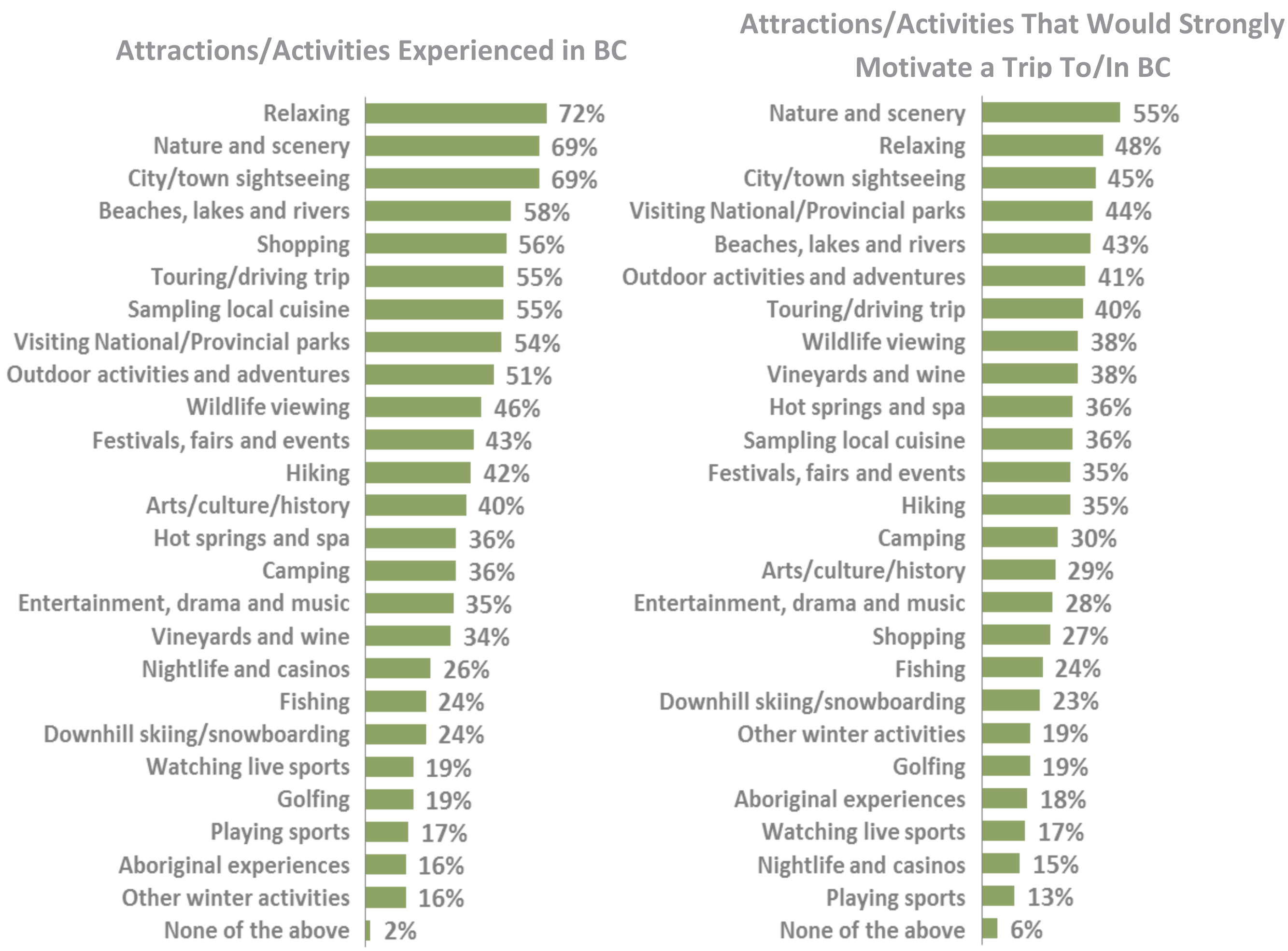
*Please note that the activities listed could have taken place anywhere on the trip, not just in the specific Regions.

** Please note that the following activities were not included in this analysis: visit friends or family, shopping, sightseeing, bar/night club, sport/outdoor activity unspecified.

[25] The Destination BC Global Marketing Plan 2017 also identifies key content themes that will be supported, including: Nature & Wilderness, Culture & Lifestyle, Cities on the Edge of Wilderness, Winter/Ski and Touring/Road Trips. Sub-topics include: Brand Iconic Experiences (Rainforests, Cities in Wilderness, Skiing, Canadian Rockies, Ocean Coast), Aboriginal Experience, Accommodation, Attractions, Activities, Food & Drink, Adrenaline Adventure, Soft Adventure, Festivals / Events, and Wildlife Viewing.

In 2014, Destination BC conducted an in-depth study of market characteristics of BC's short-haul (BC, AB, WA) markets. The study asked about activity participation on past trips to/in BC in the last 2 years and activities that strongly motivate trip to BC. (Figure 16)

Figure 16: Attractions/Activities Experienced and Motivated a Trip



Source: 2014 Destination BC short-haul consumers study. Base: those who have visited in the last two years (n=1,762)
Q1. Below is a list of leisure attractions/activities. In the first column, please select all of the attractions/activities that you have experienced while travelling on an overnight leisure trip in British Columbia in the past two years.
Q2, please select all the activities that you would be strongly motivated to travel in British Columbia to experience (whether or not you have already experienced these activities in British Columbia) on an overnight leisure trip.

Activity-specific markets

The following profiles have been provided for sector-specific markets that have also been identified as important to the long-term growth for the communities along Highway 3. Detailed reports are available on http://www.destinationbc.ca/Research.aspx and summary highlights of the most relevant activities for the Highway planning area are provided below:

Touring (2014)

- A 2009 Drive Market study conducted for Destination British Columbia revealed that the drive market of BC is made up largely of BC residents; accounting for 38% of the total market, followed by visitors from Alberta and Ontario, both contributing 15% of the market.
- Approximately one-third of Canadian touring travellers are aged 18-34 years; US touring travellers tend to be older with approximately one-quarter over the age of 65 years.
- Approximately one quarter of both Canadian and US touring travellers are in adult-only households.
- American travellers more likely to take guided tours than Canadian travellers.
- The study revealed that self-guided touring visitors who travelled within BC spent approximately $1,800 per trip. Due to longer trip lengths when compared to the US drive market; this spending figure is higher, especially among RV travellers ($2,300 per trip).
- The BC drive market is motivated to travel primarily by sightseeing (76%), opportunities for relaxation (60%) and the availability of nature / scenery / parks (56%). Touring travellers are also interested in city strolls, visiting national/provincial parks, historic sites, natural wonders.[26]

Outdoor Adventure (2016)

- In 2013, approximately 43% of visitors to British Columbia participated in an outdoor adventure activity while on their trip to British Columbia. British Columbia residents (50%) and Alberta (18%) are the heaviest participants of outdoor adventure tourism in British Columbia.
- The most common outdoor recreational activities of British Columbia residents include day hiking (55%), beach activities (51%) and swimming at a lake or river (49%). Participation rates vary by region and tend to depend on recreational assets available (e.g. higher participation in ocean activities among those living on the coast).[27]

Hiking (2009)

- Canadian day hikers skew female; Canadian overnight backpackers skew male.
- American hikers – both day and overnight skew male.
- Majority are aged 18-34; American hikers have larger number of older participants aged 45 years+.
- Well educated; moderate to affluent income.

Cycling and Mountain Biking (2009)

- Male skew to those participating in cycling activities, particularly from US (63% male); Canadian 55% male.

[26] BC Tourism Products, Touring, March 2016, Destination BC

[27] BC Tourism Products, Outdoor Adventure Tourism, March 2016, Destination BC

- 40% of Canadian cyclists are aged 18-34; US participants older with the largest group aged 45-54 (30%).
- Canadian travellers motivated by mountain biking skew younger and male with 42.8% aged 18-34 years and 74.5% male. They are affluent and educated with 46.6% having household incomes of $100,000 or more and 64.2% having completed post secondary education.
- US travellers motivated by mountain biking are 73.8% male.
- Majority (48.3%) of motivated US mountain bikers are aged 18-34 years; like their Canadian counterparts, they are affluent and well educated with 32.7% having household incomes of $100,000 or more and 59% having completed post secondary education.
- US overnight touring cyclists are skewed male as well – 82% of those travellers motivated by overnight touring are male.
- Canadian and US cycling travellers can be considered frequent travellers when compared to the overall travelling population.
- Cycling travellers also enjoy swimming in lakes, strolling the city/seeing buildings, visiting parks, natural wonders, sitting on a beach/sunbathing, visiting historic sites. Many travellers who participate in cycling also enjoy hiking.

Downhill Skiing / Snowboarding (2014)

- Male skew for travellers from both Canada and the US participating in and motivated by skiing/snowboarding; this skew is more heavily pronounced in the American visitor base; snowboarders also skew more heavily male.
- Nearly half of Canadians are younger (18-34 years); One third of American travellers are in this same age group; more American than Canadian travellers are in the 34-55 year category.
- American and Canadian skiiers and snowboarders are affluent and well educated – this is more pronounced with motivated skiiers.
- Frequent travellers; BC is rated very highly by both Canadians and Americans.
- Other activities enjoyed by Canadian alpine travellers– swimming, sunbathing, sitting on a beach.
- Other activities enjoyed by American alpine travellers – strolling through a city, visiting heritage sites.
- Activities also enjoyed by Canadian and American alpine travellers include swimming in the ocean, same day hiking trips, visiting National/Provincial parks.

Fishing (2009)

- Predominately male; 18-34 and 45-54 years of age.
- Reasonably affluent, educated.
- Majority come from adult-only households.
- Fresh water fishing dominates Canadian market (BC residents have a higher salt water fishing rate).
- Other activities – swimming, motor boating.
- Show some interest in ‘natural wonders’, visiting national/provincial parks.

Golf (2009)

- Two thirds of golf pleasure travellers from both Canada and the US who had been to BC in 2004/05 and participated in a golf activity were male – this male skew is even more pronounced amongst those motivated to travel for a golf activity.
- Canadian travellers who had participated in a golf activity while on a trip were younger than their American counterparts. Nearly 49% of Canadian participating golf travellers were aged between 18 and 44 years compared to 38% of Americans.
- Participating golf travellers tend to be high-income earners with over 43% of Canadians and over 50% of US travellers earning $100,000 or more per annum. The proportion is even high for those motivated to travel by golf activities.
- The majority of golf travellers are well educated.
- Canadian travellers motivated by golf tend to be older than the general population of Canadian travellers to BC with 37% aged 55 years or older.
- Other popular activities in addition to golf includes sunbathing/sitting on a beach; swimming in lakes; strolling to see city buildings; visiting a nature park; visiting historic sites/buildings; and swimming in oceans.
- Hiking skiing and fishing were the most common complementary sports-related outdoor activities of interest to golfers.
- Impact factors for US golfers when choosing a destination include: quality of golf course; value for money; availability of multiple courses and weather conditions.

Aboriginal tourism (various dates)

- The number of overnight visits to BC that included participation in some form of Aboriginal cultural tourism increased by an estimated 97% between 2006 and 2010 to approximately 3.7 million visits, almost double the number from 2006.
- This growth is most pronounced among the domestic market (+106%) which accounts for approximately half the Aboriginal cultural tourism volume in BC in 2010.
- An Aboriginal cultural tourism visitor often includes an Aboriginal cultural tourism product or activity in their first visit to British Columba. Visitors tend to primarily be from North American and European countries and visit British Columbia for an average of 13 days, with 3 days devoted to Aboriginal cultural tourism experiences. Primarily due to the longer length of stay, Aboriginal culture visitors spend more per trip than other visitors.[28]

Heritage (2009)

- Canadian heritage travellers tend to be younger than their US counterparts – 31% of participating Canadians are aged 18-34 years; largest group of participating Americans is over 65 years of age (25%).

[28] BC Tourism Products, Aboriginal Cultural Tourism, March 2016, Destination BC

- 32% of US travellers motivated by heritage are over age 65; only 15% of motivated Canadian heritage travellers are in this same age group.
- Motivated American heritage travellers are relatively affluent when compared to the overall population of travellers to BC and are on average more affluent than motivated Canadian heritage travellers.
- Heritage travellers also enjoy city strolls, visiting national/provincial parks, sunbathing/sitting on a beach, visiting well-known natural wonders.

4.4 Economic Trends

4.4.1 Overall Economic Performance

While some travel is required for business or personal reasons, tourism tends to be a discretionary purchase that depends on personal disposable income. When economies are strong, tourism spending grows more rapidly than consumer spending as a whole. Likewise, during recessions, tourism can decline quickly and substantially.

Overall, over the next several years[29], advanced economies are projected to increase marginally, with declined growth in Japan due to a planned consumption tax impacting other advanced economies. Three risks that influence global growth include lower commodity prices, a generalized slow down in emerging market economies and international ramifications of developments in China's rebalancing. Emerging economies have experienced five years of declined economic growth, notably Brazil and Russia that are in recession. Also, oil prices fell by about 50% in 2015 compared to 2014, with a forecast of another 10% decline in 2016 and only modest recovery in the near future. This decline is a result of three factors: increases in oil supply, weaker global demand and improved energy efficiency. For oil-exporting countries (or provinces, like Alberta) this could force more significant cuts in spending.

4.4.2 Exchange Rates

The Tourism Industry Association of Canada (TIAC) demonstrated that the impact of exchange rates on U.S. travel to Canada is unclear.[30] A variety of factors impacted the decline of Americans visiting Canada through the mid to late 2000s and early 2010s (e.g., poor economy, border security issues, passport requirements, SARS) in addition to currency fluctuation. During this period, U.S. same-day and overnight travel declined, but isolating only one influencing factor is impossible. It is likely the recent rise in visitation is influenced more by a strong rebound in the economy and favourable gas prices than exchange rates. This is also supported by past research that demonstrates low awareness of the value of the Canadian dollar by American citizens.

The impact is clearer for Canadian travel as a lower Canadian dollar tends to keep Canadians at home at least as much as incenting Americans to travel to Canada.

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[29] This summary draws information from the World Economic Outlook report (April 2016) published by the International Monetary Fund (IMF); as well as from the Organisation for Economic Co-operation and Development (OECD).
[30] http://tiac.travel/_Library/TIAC_Publications/New_ANNUAL_REPORT_EN.pdf

4.5 Consumer Trends

Trends are patterns of activity – social, economic, environmental, political and/or technological – that will affect the future over the next 20 years. Within the last decade, there have been significant shifts in consumer preferences that have affected travel choices. A summary of the most relevant shifts is outlined below. Section 2.8 describes how BC has shifted its tourism management approach to adapt to these trends.

Overall, the impact of the various economic, demographic and attitudinal trends is that the tourism market will become more segmented, and product demand will become more diverse.

Consumer Trends	Description	Implication
Shifting Demographics / Millennials	By 2030, the world's population is expected to increase 20% from today's 6.9 billion to 8.3 billion. Many developed countries have now progressively ageing populations. Rural-to-urban migration continues to be a significant pattern within many countries. Millennials, also known as Generation Y, are the demographic cohort born between the early 1980s and the early 2000s. Millennials are one of the largest generations in history are emerging as important to the tourism industry due to their sheer size and contribution to international visits.	Tourism needs to account for the preferences and needs of older travellers who may have a 'younger' outlook but may need nearby medical care. Also, seasonal travel patterns may shift as older travellers have the freedom to travel outside of traditional peak periods. Increases in multi-generational families and solo travellers will require more flexible options for transportation, accommodation, and services. Destinations need to plan for millennials unique travel preferences, including their preference for: o Experiences that align with social equality, personal growth, authenticity, innovation and environmental consciousness, and o Automatic and essential use of technology.
Shifting Values and Attitudes	Health, environmental sustainability, and ethics values are more prevalent and creating higher demand for certain products.	BC is well endowed with natural beauty and pristine wilderness, which is a draw for international and domestic travellers. Finding a balance between encouraging visitation to BC's natural assets and preserving them will be critical.
Mobile Technology	The use of mobile and other technology has exploded, with most travellers now having near-constant access to web enabled devices. Consumers increasingly place a huge value on being connected and use technology for sharing ideas, getting news, researching, communicating with friends and industry.	For destinations, this means an opportunity to reach travellers both before and during their trip and draw them off the traditional tourist path. Businesses and destinations need to adapt to the continued innovation and increase in the use of mobile devices by ensuring connectivity and online information sources.

Consumer Trends	Description	Implication
Transportation Innovation and Technology[31]	New transportation technologies are emerging, including connected and autonomous vehicles, alternative fuels, keyless fleet management and traffic analytics. Connected technology focuses on wireless communication: vehicle-to-vehicle, vehicle-to-pedestrian and vehicle-to-infrastructure.	Transportation concepts, policies and legislation is rapidly evolving. New technology for on-road communications will dramatically change how vehicles operate, provide information and capabilities for better, real-time traffic management and provide enhanced traveller information.
Advocacy / Social Media	Recommendations and stories from other travellers is the most influential source of information for travel destinations, with positive word of mouth driving travellers to take action. Advocates are believed to represent up to 25% of the consumer base with the potential to influence the remaining 75%.	Traveller advocacy begins with an experience. Focusing on developing positive and remarkable visitor experiences, products and services will have a greater impact than marketing tactics alone. Local destinations, tourism businesses and communities all gain from leveraging traveller advocacy.
Travel Information Sources	Different consumers are at different stages of travel decision-making and require different information. Awareness and inspiration occur mostly through traditional media and word of mouth; trip-planning through on-line web-sites and traveller review sites. Social networks are still an occasional planning tool for most but are growing in importance.	Visitor services must extend beyond bricks-and-mortar locations to take advantage of the ability to connect with visitors via new digital information and servicing opportunities. Societal trends and specifics around individual trips are always changing so the landscape of trip planning and visitor services will continue to evolve.
Sharing Economy	Travel disrupters such as sharing economy organizations like Airbnb and Uber are changing the travel landscape. Travel disrupters have led to more traveller choice for accommodation and transportation trip components.	As travellers are able to experience destinations from a local's perspective, more residents are able to get involved with and benefit from tourism. These alternatives present an opportunity for destinations that lack traditional infrastructure like large hotels and transportation systems.
Customer Service / Personalization	Technology has shifted power from institutions to the individual consumer and at the same time, consumers are more cost-conscious. Businesses have a new focus on providing personalized customer service at a lower cost, e.g., online self-service, online chat and facilitation of service from online communities. Increasingly, customers are shopping across multiple locations – in-store/person and devices – desktops, smartphones and tablets.	Customers increasingly expect continuity and best-practice service between customer service channels. This expectation has been extended to the tourism industry. Consumers will expect this capability throughout their travel experience, from the smallest to largest businesses and destinations.

[31] http://www.govtech.com/transportation/How-Transportation-Technologies-Will-Change-Everything-.html

Consumer Trends	Description	Implication
High Quality, Authentic Experiences	The last decade has witnessed growing demand for vacations that offer authentic opportunities to experience the culture, natural attributes and unique activities of the local destination as well as enrich the traveller's life. This is particularly true for the emerging millennial market. There has been a growth in the awareness and availability of aboriginal tourism experiences throughout BC, with efforts led by Aboriginal Tourism Association British Columbia (AtBC).	Destinations should understand and track components of remarkable experiences in BC: unless the tourism product meets the needs and expectations of visitors, the destination cannot realize its full potential. One way to do so is to measure Net Promoter Score. Two critical drivers for NPS include the natural environment and the supporting tourism infrastructure. Ensuring attributes of the natural environment are maintained and protected will support continued interest in BC as a travel destination.
Value, Staycations and Time Poverty	Travellers continue to place greater emphasis on achieving greater value for money when decision-making and purchasing. The 2015/16 fall of the Canadian dollar has led to many Canadians to avoid travelling to the U.S., but stay at home or within Canada. In some markets and some demographic segments, it appears that populations are feeling greater pressures on leisure time, leading to more frequent shorter trips.	Despite increases in wealth, people do not necessarily feel wealthier and continue to seek budget travel options. BC is not perceived as an inexpensive, or 'value' destination which drives the importance of top quality experiences facilitated by outstanding visitor services. The "time poor" consumer generally wants to maximize their 'value for time' with quick purchases, fast check-ins, easy transportation logistics, and option activities during trips.

4.6 Destination Management Trends and Policy Issues

Management Trends	Description	Implication
Shifts in Role of DMO	DMOs continue to evolve their role in response to changing consumer behavior and competitive pressures.	Destination Marketing Association International (DMAI) documented three main groups of action by DMOs in response to evolving trends. They include: • Dealing with the New Marketplace: Shifting from broadcast communication to engagement with travellers. • Building and Protecting the Destination Brand: More emphasis on the quality experiences and destination advocacy, management and development. • Evolving the DMO Business Model: Working together with public and private sector partners to build new business model for DMO.
Tourism Marketing Trends	DMOs have evolved their marketing strategies and initiatives to meet shifting	Destinations should ensure development activities align with regional, provincial and national branding

Management Trends	Description	Implication
	consumer preferences. There is a new focus on digital, mobile, social advocacy, personalization, outstanding customer service, authentic experiences, partnerships and alignment with other agencies.	and marketing initiatives. Also, destination development activities should focus on remarkable, authentic experiences that surpass visitor expectations in order to encourage repeat visitors and positive word-of-mouth.
Visitor Services Trends	An increasing number of travellers plan their trips and get visitor information online. Smartphones have accelerated this trend, with instant information available on-the-go, thus causing rapid drops in the number of visitors at physical visitor centres.	Destinations need to consider a multi-channel approach to providing visitor services. The traditional bricks-and-mortar approach of welcoming visitors at visitor centres no longer has the broad economic impact that it once did.
Competition	Global competition is fierce. Mature destinations are embracing the value of tourism while emerging destinations increase their competitiveness and target new markets. Also, locally, there is growth in the number of BC destinations looking to tourism to increase their local economy.	To maintain and grow market share, BC tourism businesses will need to be accessible and accommodating to these markets, and our messaging must be relevant to this audience.
Climate Change and Tourism	Global warming impacts to the tourism industry include: • Retreating glaciers, milder winters and reduced snowfall. • Rising sea levels on coastal areas. • More frequent / intense forest fires. • Changes in the natural landscapes, parks and protected areas. • Impacts on wine producing regions, marine environments and fisheries, and species migration, decline extirpation.	The industry has a responsibility to reduce its own climate change footprint by undertaking various infrastructure retrofit, management, operational and programming changes to reduce energy and water use and overall greenhouse gas emissions. Destinations should consider climate change while planning tourism infrastructure and products.
HR/Labour	The market for tourism employment, both globally and in Canada, is expected to face considerable workforce shortages in the future. BC's tourism industry is expected to have 101,430 job openings by 2020, affecting the food and beverage services, recreation and entertainment industry sector.[32]	Local tourism businesses and destinations will continue to evolve to attract a sufficient labour force, including: • Raising wages to attract more employees. • Highlight opportunities for advancement to prospective employees; workers aged 15 to 24 years were twice as likely to remain with their employer when given opportunities for advancement.

[32] Source: www.destinationbc.ca/BC-Tourism-Industry/provincial-tourism-strategy-and-policy.aspx

Management Trends	Description	Implication
	Changes to the Temporary Foreign Worker (TFW) program have restricted the capacity and ability, in some cases, to make use of the program within the tourism industry.	• Individual businesses can increase annual vacation days from two weeks • Identifying underused labour pools including mature workers, persons with disabilities and new immigrants.
Land Use	Increasing competition among resource industries, competition within land-based tourism sectors and increasing visitor volume could lead to pressure on land-based tourism policies and businesses.	Elements of BC's natural environment are seen as important reasons to recommend BC as a destination and ultimately travel again. Ensuring these attributes are properly maintained and protected will support continued interest in BC as a travel destination.
Sharing Economy Emerges	Travel disrupters such as sharing economy organizations like Airbnb and Uber are changing the travel landscape and providing more value and choice to consumers.	Travel disrupters have led to increased competition with existing, traditional travel businesses (e.g. taxis, hotels), which, along with concerns for traveller safety and fair commerce, has led to review of existing regulation and policies.

4.7 BC Tourism Policies

4.7.1 National and Provincial Industry Association Policy Recommendations

TIAC suggests public policy challenges in three key areas are inhibiting tourism growth in Canada. TIAC recommends the following shifts:

1. Competitive and sustainable long-term funding for Destination Canada.
2. More competitive tax and visa policy.
    1. Aviation Taxes & Fees: Canada is a "Fly-to" destination – and the cost structure is a barrier to success. Airport rents, fuel taxes and security fees have rendered Canada 105th in the world for aviation cost structure according to the World Economic Forum.
    2. Visas & Border Issues: Facilitating the process of crossing the Canadian border is essential for generating more business and leisure travellers: improve border access and infrastructure; build on pre-clearance services and trusted traveller programs; and build an effective visa system to encourage visitors from key emerging markets including Brazil, Russia, India, China and Mexico.[33]
3. Investments in tourism products owned by federal and provincial governments (e.g., parks, museums and heritage areas), and renewal of support for attractions and festivals creates urgencies for travellers to choose Canada.[34]

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[33] On June 28, 2016, the Government of Canada announced it will eliminate the need for visitor visas from Mexico. http://pm.gc.ca/eng/news/2016/06/28/canada-lift-visa-requirements-mexico

[34] http://tiac.travel/advocacy_global.htm

TIABC has identified these four priority policy challenges in British Columbia:[35]

- Private Room Rentals in BC: As short-term, room rentals in private homes have grown exponentially as a trend, it is critically important to have regulations introduced within each community. The tourism industry in BC continues to lose potential hotel tax revenue and now many resort communities, particularly those with seasonal employees, are affected by lack of available rental accommodation for staff. TIABC's policy recommendations include processes for local and provincial government to address the tax and compliance issues.
- Formula Funding for Destination BC: It is critically important to have a sustainably and competitively resourced destination marketing organization in BC and Canada. Destination marketing exists because the private sector and policy makers recognize that the tourism industry is comprised largely of small and medium sized businesses that lack the ability to market into the competitive global market place on their own. TIABC's policy recommendations include dedicated formula-funding for tourism marketing at the provincial and national level.
- Canada-U.S. Pre-clearance: TIABC recognizes the critical importance of access from British Columbia's most important international source market, the United States. With sustained advocacy, smart pilot projects and effective industry on government prioritization, British Columbia can position itself at the front of the line to operationalize the historic Agreement on Land, Rail, Marine and Air Transport pre-clearance as part of the Beyond the Board Action Plan. TIABC's policy recommendations ensure that the Province of BC work with both the Government of Canada and across the border to ensure efficient passage of the treaty.

4.7.2 Land Use Policies

Crown land is land that is owned by the provincial government and includes any lakes or rivers that cover the land. This land is available to the public for a wide range of uses including such things as tourism and recreation, forestry, mineral extraction, oil and gas extraction and production, agriculture and a range of other uses for economic or non-economic activities. The use of Crown land in BC is allocated according to the following Crown Land Allocation Principles:

1. Crown land values are managed for the benefit of the public.
2. Economic, environmental and social needs and opportunities are identified and supported.
3. The interests of First Nations' communities are recognized.
4. Decisions are timely, well-considered and transparent.
5. Public accountability is maintained during the allocation of Crown land.

These principles provide guidance to public officials who are involved in making decisions related to the allocation of Crown land. Details about tourism policy on Crown Land are found in Appendix 9.5.

[35] TIABC. 2016. Personal Communication.

4.8 Destination Management and Marketing Focus in BC

There have been significant shifts in the strategic direction of tourism in BC, including from the Ministry of Jobs, Tourism, and Skills Training with the Gaining the Edge Strategy, as well as from Destination BC's corporate strategy and 2017 Global Marketing Plan. Shifts include:

- BC's tourism system is evolving to become better aligned in destination development, marketing and use of the BC destination brand.
- New roles for the regional tourism organizations and business advisors with an increased focus on destination development. New roles for the sector marketing organizations (e.g., mountain bike, boating, etc.) with an increase role in marketing provincially;
- An increased number of 2% tax funded communities through the Municipal and Regional District Tax (MRDT). Increase of allowable MRDT tax from 2% to 3%, which may inject an additional $10 million to $20 million into the tourism system (currently ~ $30 million collected by over 50 MRDT communities in BC).
- Increasing focus on content creation, data-driven on-line marketing, advocacy, social media and inspiring travel via passions. (In 2017, Destination BC will focus on the following passions: ski enthusiasts, mountain bikers, fishers/anglers, wine/culinary (breweries, wineries and dining) and golf).
- Increasing use of Explorer Quotient (EQ) in marketing and destination development efforts.
- Increasing use of Net Promoter Score® (NPS®) to measure the intention to recommend/refer a travel destination, organization or sector. Destination BC has identified NPS drivers as a common provincial goal. For further information on NPS, see Appendix 9.6.
- Empowering the Visitor Services Network to increase the impact, reach and accessibility of innovative visitor services in communities to ensure remarkable experiences for visitors at every touch point.
- Assisting tourism businesses to evolve their offerings and meet and exceed guest needs and expectations through the development of remarkable experiences.
- Enabling tourism businesses to elevate their abilities by offering enhanced professional development and learning resources.
- A strong focus on destination development throughout the province through collaborative, integrated planning and coordination and that leads to enhanced tourism economic growth.

4.8.1 Key Markets

Destination BC's investment strategy focuses on three investment classifications to determine where marketing activity and funding will be best focused.

Invest for Growth - Destination BC will invest in these high-potential markets to inspire new and repeat travel to BC and increase market share. Markets: British Columbia, Alberta, US (Washington, California) and China.

Maintain to Strengthen - Destination BC will maintain investment in these traditional markets to ensure BC continues to be a travel destination of choice. Markets: Ontario, UK, Germany, Australia and Japan.

Respond and Monitor - Destination BC will support Destination Canada in these markets and watch for changes that indicate new market strategies and investments that are warranted. Markets: South Korea, Mexico, India and France.

Markets included in 'invest for growth' and 'maintain to strengthen' are considered Destination BC's top ten key markets (BC, Alberta, Washington, California, China, Ontario, UK, Germany, Australia and Japan). All of Destination BC's marketing activities – Consumer Marketing, Travel Trade, Travel Media, Co-op Marketing – are all designed to drive growth from these markets.

While investment is not currently present for markets included in 'respond and monitor' (South Korea, Mexico, India and France), they continue to be important markets for BC. Through partnership with Destination Canada, Destination BC will continue to work with travel media to increase awareness and travel trade to increase product in the market.

Demographics also are reviewed by market. Although the Millennial cohort (ages 18-35) may be the same size as global Baby Boomers (52-70), they do not have the same wealth. In addition, Baby Boomers tend to be retired, or close to retired, and have the time to travel. In activities where age is relevant, Destination BC will focus primarily on Baby Boomers in the US and Europe (except for ski), and will focus on Millennials/GenX in China, Japan and Mexico. (Figure 17)

Figure 17: Leisure Visitors to BC by Market

	BC	AB	ON	WA	CA	CH	AUS	GER	UK	JP
Millennials (Ages 18-35)**	34%	36%	35%	16%	15%	31%	30%	32%	16%	**40%**
Generation X (Ages 36-51)**	**40%**	**39%**	**38%**	31%	32%	**52%**	23%	**39%**	34%	19%
Baby Boomers (Ages 52-70)**	26%	26%	27%	**39%**	**43%**	13%	**44%**	22%	**43%**	39%
Other Generations	N/A	N/A	N/A	14%	10%	4%	2%	7%	7%	2%

**Approximate current age range for each generation, based on media sources.
Source: Destination BC Global Marketing Plan, 2017.

4.8.2 Traveller Type

AUTHENTIC EXPERIENCERS
(PRIMARY)
Older and highly educated, they relish experiencing all their travel destination has to offer in an authentic, reserved, non-exorbitant way. They like the freedom of doing their own thing and connecting with the locals, and have a particular interest in history.

CULTURAL EXPLORERS
(PRIMARY)
Avid, open-minded and socially engaged travellers, they embrace, discover and immerse themselves in all aspects of the travel experience. They seek spontaneous and authentic experiences on their own terms.

FREE SPIRITS
(SECONDARY)
Younger, adventurous thrill seekers, they are highly social and open-minded. They are committed travellers who indulge in high-end experiences that are shared with others.

Destination BC primarily markets to leisure travellers (65%). Along with the consumer insights gained through branding consumer research, Destination Canada's Explorer Quotient (EQ) psychographic segmentation model allows us to more deeply understand and inspire the motivations, dreams and passions of our target consumers. Destination BC activity targets three of the twelve North American EQ segmentation types - Authentic Experiencers, Cultural Explorers and Free Spirits.

Although activities overlap by EQ type, travellers in each EQ type also have unique interests – for example Cultural Explorers want to be immersed in the culture of a destination (e.g., sampling the local cuisine is one way to achieve an understanding of the people and the area of the destination), while Free Spirits are keen on bucket lists and brand names (e.g., shopping being one outlet for acquiring brand name possessions).

Destination BC conducted research on its North American (BC, AB, WA, CA, ON) consumers which included travellers who intend to travel to BC in the next two years. As part of the research, consumers were asked what activities they intended to participate in while in the province. General sightseeing, nature/scenery and relaxing are common top five activities across all the four EQ types, however, they may wish to participate in the activities differently (e.g. nature/scenery – guided group tour versus a local guide). (Figure 18)

Figure 18: Top Five Activities EQ Types Anticipates Participating while in BC

	Authentic Experiences *(n = 503)*		**Cultural Explorers**	***(n = 263)***
Top 1	General sightseeing	70%	Nature, scenery	75%
Top 2	Nature, scenery	66%	Relaxing	71%
Top 3	Touring/driving trip	63%	General sightseeing	67%
Top 4	Relaxing	59%	Touring/driving trip	61%
Top 5	Walking	57%	Sampling local cuisine	60%
	Free Spirits *(n = 395)*		**Gentle Explorers+**	***(n = 810)***
Top 1	Relaxing	72%	Relaxing	57%
Top 2	General sightseeing	66%	General sightseeing	56%
Top 3	Nature, scenery	57%	Touring/driving trip	49%
Top 4	City/Town sightseeing	55%	Nature, scenery	45%
Top 5	Shopping	52%	City/Town sightseeing	43%

Destination BC's Brand Discovery Research (2013)

+Gentle Explorers: while not one of Destination BC's targeted EQ types, it is the largest segment of travellers within BC.

5 HIGHWAY 3 MANAGEMENT CONTEXT

5.1 Management Structure & Key Initiatives

The tourism industry in B.C. is comprised of many different organizations with various stakeholders including tourism businesses, suppliers, product sectors, communities, associations, regional destination marketing organizations, First Nations and federal, provincial, and municipal governments, all playing a role in destination management (examples):

Federal

- Destination Canada
- Western Economic Diversification
- Parks Canada
- Department of Ocean and Fisheries

Provincial

- Destination BC (DBC)
- Ministries:
  - Jobs, Tourism and Skills Training
  - Transportation and Infrastructure
  - Forests, Lands and Natural Resource Operations, incl. Rec Sites and Trails
  - BC Parks
  - Community, Sport and Cultural Development

Regional

- Regional Airports
- Regional Districts
- Regional Chambers of Commerce
- Economic Development Organizations
- Funding Organizations & Trusts
- DMO's
- Post-Secondary Educational Institutions

Local

- First Nations
- Local Governments
- Community DMO's
- Chambers of Commerce
- Visitor Centres
- Tourism Operators
- Arts, Culture, Heritage Organizations
- Clubs/Volunteer Groups
- Residents

In Highway 3, there are multiple local organizations that play a role in destination development, including:

- Arts organizations, such as Hope and District Arts Council, Cranbrook & District Arts Council, The Princeton Arts Council, Osoyoos & District Arts Council, Castlegar Arts Council, Selkirk Weavers and Spinners Guild, Artisans of Crawford Bay, Nelson and District Arts Council, The Civic Theatre Society (Nelson), Trail and District Arts Council/Charles Bailey Theatre, Rossland Council for Arts and Culture;
- Music organizations/festivals, such as Ponderosa Music Festival Rock Creek, Shambhala Music Festival Salmo, Princeton Traditional Music Festival, Keremeos Bluegrass Country Jamboree, Creston Concert Society, Valley Bluegrass Music Society (Castlegar);
- Heritage Organizations, such as Greenwood Heritage Society, Greenwood Legacy Group, Sparwood Arts and Heritage Society; Princeton and District Museum & Archives, Osoyoos & District Museum and Archives, Castlegar and District Heritage Society, Creston Museum, Trail Historical Society, Nelson Museum, Rossland Historical Museum and Archives Association;
- Agricultural/Farmers Market organizations – Kootenay Local Agricultural Society, Creston Valley Farmers Market, Rossland Mountain Market Society, Cottonwood Community Market (Nelson);
- Business development organizations, such as AdvantageHOPE, Chambers of Commerce for the various communities, Community Futures, Fields Forward (Creston), Creston Valley Food Action Coalition;
- Conservation and environmental organizations, such as Hope Mountain Centre for Outdoor Learning, Sparwood Fish and Wildlife Association, Vermilion Trails Society, Wildsight, West Kootenay EcoSociety, Friends of Kootenay Lake Stewards, Rossland Society for Environmental Action;

- Trails organizations, such as Castlegar Parks and Trails Society, Kootenay Columbia Trail Society, Trails for Creston Valley Society, Nelson Area Trail Society; Fernie Trail Alliance,
- Cycling organizations, such as Creston Valley Cycling Club, Castlegar Mountain Bike Society, Nelson Cycling Club;
- Nordic Trail organizations, such as Black Jack Nordic Ski Club (Rossland), Castlegar Nordic Ski Club, Nelson Nordic Ski Club Fernie Nordic Club;
- Snowmobile organizations, such as Castlegar Snowmobile Association, Nelson Sno-Goers,
- Other Sports Clubs (i.e. Ice Hockey, Figure Skating, Curling, Bowling, Golf, Soccer and Baseball);
- Service Clubs, such as the Lions Club, Fraternal Order of Eagles, Knights of Columbus and Sparwood Futures Society; and
- Nelson Road Kings Car Club, Kootenay Lake Vintage Car Club.

For a full list of local community organizations, see Appendix 9.7.

The following charts outline the main Federal, Provincial, First Nation, Regional and Local initiatives that are relevant to tourism development and specific to communities along Highway 3.

Federal	
Description/Mandate	**Key Initiatives**
Government of Canada More than 15 Government of Canada departments and agencies work together to support Canada's tourism industry.	• Promotional investment in the US Market. • Improving border access to Canada. Improving VISA services, e.g., reinstating VISA with Mexico. • Improving National Parks. • Financial support to tourism businesses, communities in partnership with other levels of government and with Aboriginal communities. • Investing in tourism and cultural infrastructure, e.g., the Building Canada Plan and Canada's Economic Action Plan both invest in infrastructure that benefits tourism, such as convention centres, exhibition halls, arts centres, and sports, recreational, cultural and heritage assets. • Supporting the development of Aboriginal cultural tourism experiences, in particular near national parks. • Support and tools for cultural and heritage tourism.
Destination Canada is a federal Crown Corporation that is Canada's national tourism marketing organization. $90 million (Total Budget)	• Manage the Canada Brand. • Strategic marketing in 11 International markets: Australia, Brazil, China, France, Germany, India, Japan, Mexico, South Korea, the UK and the US. • Market research and analysis. • EQ Program management. • Promotes product and industry development. • Increase focus and investment in the US Market. • Focus on big data to improve marketing effectiveness. • Focus on partnerships to extend marketing reach.

	• Assist small – medium sized businesses in being ready and able to promote their products and travel experiences to the international markets. A focus on supporting entrepreneurship. • Focus on youth travel. • Developing marketing platforms for partners to help close the sale. • Measurements, research and insight.
Western Economic Diversification (WD) $137 million (2015/16 Total Budget)	• WD invests in a wide range of programs and projects that focuses on the economic development of Western Canada. • Initiatives: The Canada 150 Community Infrastructure Program supports community infrastructure including cultural centres and museums, parks and recreational trails and tourism facilities; Western Diversification Program is the main program through which WD invests in projects related to innovation, business development and entrepreneurship, community economic development and policy, advocacy and coordination. • Financial support for AtBC and Aboriginal tourism development.
Parks Canada $1,157.7 million (2015/16 Total Budget)	• Protect and present nationally significant examples of Canada's natural and cultural heritage. Initiatives: Infrastructure Investment, Indigenous Affairs, Environmental Stewardship. • Kootenay National Park of Canada is UNESCO World Heritage Site featuring Radium Hot Springs. • In 2011, Parks Canada conducted a feasibility study for a proposed National Park Reserve in the South Okanagan-Lower Similkameen. The proposal did not proceed.

Provincial	
Description/Mandate	**Key Initiatives**
Destination BC (DBC) $52.6 million (2015/16 Total Budget)	• Includes several communities along Highway 3 in marketing BC domestically, nationally and internationally as a tourist destination via consumer advertising and campaigns, travel trade, media relations, content generation and social media efforts. • Market research and analysis. • Destination Development Planning – Highway 3 Planning Area. • Remarkable Experiences program has been implemented in Fernie (resort experience) and in the Okanagan (Rail Trail and winter experiences). • Visitor Services Network – service funding and Innovation Fund. • Dedicated Vancouver, Coast and Mountain's (VCM) Business Advisor and Travel Media Relations & Travel Trade representatives are primary liaison between DBC and VCM communities.
Ministry of Jobs, Tourism and Skills Training (MJTST) $195.4 million (2015/16 Total)	• Initiatives: Tourism policy direction and coordination between government and Destination BC, Resort Municipality Initiative, Aboriginal business and investments, Industry Training Authority, Creative BC. • WorkBC - helps people find jobs, explore career options and improve their skills. Also, help employers fill jobs and grow their businesses. • Community support for economic development

	• MRDT program – up to 3% tax to sale of short-term accommodation to provide funding for local tourism marketing, programs and projects.
	• Resort Municipality Initiative – funding provided to eligible resort-based communities (program extended to December 2017). There are four RMI communities along Highway 3:
	    ○ **Osoyoos:** Waterfront facility enhancement, waterfront safety, boat trailer parking, trail systems, marina facility enhancement and interpretive wetland area development.
	    ○ **Fernie:** Trail maintenance and development, tourism events and festivals, Fernie museum and info centre improvements, winter evening shuttle, boat launch and tourism signage.
	    ○ **Rossland:** Improved signage, visitor centre enhancements and seasonal shuttle service.
	    ○ **Kimberley**: Mountain bike trails, trail kiosks, festivals and events, signage and a winter ski shuttle.
	• Creative Sector - provide expertise and business support to strengthen BC's motion picture, interactive digital, music and publishing sectors.
	• Tourism Policies - work across government to identify and mitigate policy barriers across government.

Ministry of Aboriginal Relations & Reconciliation	• Work on agreements that support First Nation self-governing and broader economic development, including: • General support for the work of AtBC. • First Nation Leadership Gathering, 2016 – all First Nations commitment to participate in the Destination BC Destination Development Planning process.
Ministry of Transportation and Infrastructure (MOTI) $843.4 million (2015/16 Total budget)	• DriveBC and BC Highway webcams for Highway 3. • Realignment of Highway 3 between Hope and Princeton, to improve safety. The Province of British Columbia is providing $17,307,500, for a total project cost of $27.65 million. • Improvements to the Pine Street-Railway Boulevard intersection with Highway 3. This will improve safety for motorists travelling on Highway 3 through Creston, and improve access to and from the highway for Creston residents. The total project value is approximately $5.4 million, with funding coming from the Province of B.C. and the Town of Creston. • Province invested approximately $6 million to resurface an important stretch of Highway 3 between Hope and Nicolum Creek Bridge. • MoTI improved cycling paving / safety on highways. • Community Works – in April, 2014 tourism infrastructure was added to the eligible list (from gas tax funding). • British Columbia Air Access Program (BCAAP) provides capital funding to assist B.C. airports with improvements to their infrastructure. $24 million available over 3 years.
Ministry of Forests, Lands and Natural Resource Operations, including Rec Sites and Trails (RST)	• FrontCounter BC - single window service for clients of provincial natural resource ministries and agencies. Located in Castlegar, Cranbrook, and online. • Cumulative Effects Framework – assessing and managing the measure the effect of all natural resource activities on values that are important to the people of British Columbia.

$608.1 million (2015/16 Total Budget)	• BC Rural Dividend Fund - The $75 million fund will assist rural communities and organizations diversify their economies and build and retain their workforce. First Nations are eligible for funding. Awards from the first intake included Castlegar and District Community Services Society ($100,000); City of Trail ($79,759). • Heritage BC Grants and Programs. 2016 projects included Kootenay Lake Historical Society SS Moyie interpretive signage; Rossland Heritage Commission Calvary Cemetery Signage; in 2014 Rossland also received funding for the Miners Hall Preservation and Restoration; Fort Steele – Provincial Heritage Site is supported financially by Province. • Recognition Programs. • Forest Stewardship Plans: Public consultation and considerations for recreation and other use required. • Stewardship of Provincial Crown land and natural resources, and protection of BC's archaeological and heritage resources. Initiatives: BC Wildfire Services, Crown Land Policies, and Fish, Wildlife & Habitat Management, Resort. • Heritage management, including Fort Steele Town, and the Grist Mill at Keremeos. • Recreation Sites and Trails Initiatives: Mountain Biking, Provincial Trails Strategy. Ongoing authorization of events in parks. (Southern Interior East District) – many investments are being made by RST in the planning area including trail planning (Creston/East Shore) and mountain biking trails (Castlegar). • BC Wildfire Services.
Ministry of Environment, including BC Parks $138.9 million (2015/16)	• Protected Areas Framework for British Columbia's South Okanagan[36]. • Capital investments in existing BC Parks. • Working with PFOs to enhance visitor services, e.g., RV rentals, activities. • Have been monitoring the displacement of wildlife from the use and construction of trails. • New Parks Strategy, including: - Addition of 1,900 new campsites or recreation sites close to popular campgrounds, with Okanagan and Kootenays designated as areas for growth. - More park rangers. - Accessibility assessments and enhancements. - Potential for application of Osoyoos Desert Centre as a UNESCO World Heritage Site. - First Nation cultural connections. • Process applications and activities for filming.
Ministry of Community, Sport and Cultural Development (MCSCD)	• In February 2016, the Ministry announced a three-year Creative Economy Strategy. As part of the strategy, the Province will be targeting $1.5 million over the next three years towards shared creative spaces, including:

[36] http://www.env.gov.bc.ca/bcparks/planning/pdfs/ip-protected-areas-framework-so.pdf?v=1479695789247

$228.5 million (2015/16 Total Budget)	- Invest in hosting major festivals and events. - Collaborative Spaces intake – grants up to $50k for collaborative projects. - Showing artists/galleries in International markets. - Business development work for artists/arts organizations under development. - Artsvest training and incentive program designed to spark new business sponsorship of arts and culture. The Arts Council of the Central Okanagan is a participating organization for 2016. • Develop a five-year Sports, Arts and Culture Hosting Program, designed to attract marquee events, and maintain the province's reputation as a premier sports and cultural event destination. (Working with MJTST.) • Climate Action Charter – all municipalities and regional districts on the Highway 3 corridor have signed the charter. • Community Recreation Program: Castlegar outdoor natural swimming pool $400K. Cranbrook Cycle/Walk Trail Extensions and Upgrades $280K, Fernie Max Turyk Soccer Field Development $350K, Greenwood Ball Field Upgrade to Multi-Use Recreational Field $263K, Hope Community $370K, Recreation Park, Midway Arena Expansion/Upgrade $400K, Osoyoos Dividend Ridge Trail $232K, Princeton Zig Zag Pedestrian Walkway & Integrated Sidewalk Improvement $180K, Salmo Valley Community Centre Health Fitness Expansion Project $80K, Sparwood Leisure Centre Energy Retrofit $400K, Nelson Outdoor Skatepark $400,000. • New Building Canada Fund/Small Community fund: West Fernie Water System Upgrade $6.9m; Fernie James White Well Project $1.6m and Grand Forks Wastewater Treatment Plant $306K; City of Rossland Washington Water Main Replacement (drinking water) $2.2 million. • BC Arts Council funding – accessed by many organizations in the planning area. • Gaming Grants: Local organizations up to $100,000 per year; Regional organizations up to $225,000 per year; Province-wide organizations up to $250,000 per year.
Ministry of Agriculture	• Agricultural Area Plans: (Area 'A' RDOS & Town of Osoyoos; Agricultural Plan 2011; Creston Valley Agriculture Plan 2002; Regional District of Central Kootenay Agriculture Plan (whole region) 2011; East Kootenay Regional District 2014; Boundary Area Agricultural Plan 2012, Midway Agriculture Plan being considered (2016). • Regulatory changes to allow farmers to hold special agri-tourism events, e.g., weddings and music festivals on their property without a permit, providing specific conditions are met, such as a maximum of 150 guests at each event, a restriction of 10 events or less annually, no permanent parking, and no new permanent structures built on the land. • Buy Local program. • Create new markets for BC wine, craft beer and spirits. • Strengthen certification and quality assurance programs. • Looking for support in demonstration economic value of agri-tourism.
Heritage BC	• Manage the Heritage Legacy Fund, and administer grants. • Manages the Chinese Canadian, Japanese Canadian Recognition program, identifying areas of significant cultural value.

	• Japanese Canadian Historic Places Recognition Project received over 270 nominations by the November 30th 2016 deadline. Next steps will be announced in early 2017. Nominations in the planning area include: the Greenword (Japanese Canadian Internment Camps, BC), Christina Lake and Tashme (Japanese Canadian Internment Camps, BC, near Hope)
Aboriginal Tourism Association of BC (AtBC) www.aboriginalbc.com	• Works closely with tourism, business, education and government organizations to help British Columbia's Aboriginal tourism businesses offer quality experiences and actively promotes these experiences to visitors and local residents. • Initiatives: marketing and promotion, training and business development, Aboriginal travel services (travel agency), regional strategies, Klahowya Village (Vancouver/Victoria), "Authentic Aboriginal" cultural authenticity program. • Training programs: 12 workshops - training and capacity building program to develop tourism businesses, improve market readiness and assists with job/careers. • Actively promoting stakeholders through marketing efforts such as social media, blogs, sharing culture/stories; five along Highway 3: St. Eugene Golf Resort Casino (Cranbrook); Nk'Mip Desert Cultural Centre (Osoyoos); Nk'Mip Cellars (Osoyoos), Nk'Mip RV Park (Osoyoos), Spirit Ridge at Nk'Mip Resort (Osoyoos). • Partnership with TOTA on the addition of a Regional Aboriginal Tourism Specialist to the TOTA team, responsible for developing a cultural tourism strategy in alignment with TOTA's Embracing Our Potential and AtBC's The Next Phase plans. The endeavour is to develop economic opportunities and progress Aboriginal tourism business within the region.
Sector Marketing Organizations	• Multiple sector marketing organizations support operators and communities, including: - Mountain Bike Tourism Association: launching new tourism development services for communities; research; contribute to Mountain Bike Tourism Manual; and marketing efforts. www.mountainbikingbc.com - BC Camping and RVing Coalition: marketing efforts. www.campingrvbc.com - Backcountry Lodges of BC Association: marketing efforts www.backcountrylodgesofbc.com - BC Fishing Resorts & Outfitters Association (BCFROA): marketing efforts www.wheretofishinbc.com - Canada West Ski Areas Association: media relations and marketing www.cwsaa.org - BC Golf Marketing Alliance www.aga-bc.org/bcgma - BC Wine Institute (BCWI): marketing and advocacy efforts http://www.winebc.com/
go2HR	• Supporting the tourism industry in attracting, training and retaining a reliable and skilled workforce.

	• WorldHost Training Services - delivers world-class customer service workshops, e-Learning and customized courses for the tourism and hospitality industries. (go2Hr will be program owner effective 2017.) • Partnership with TOTA for full-time human resource staff to assist regional tourism businesses with human resources related strategies. • HR counsel to the Highway 3 Destination Development Planning process.
Tourism Industry Association of BC	• Advocacy on national tourism issues (e.g. air access, customs and borders, etc.). • Lobbying and creating awareness about specific provincial tourism issues (e.g. land use issues, etc.). • Providing tourism related information and research services.
WildSafe BC	• WildSafeBC is a program designed, owned and delivered by the BC Conservation Foundation designed to reduce human-wildlife conflict through education, innovation and cooperation.

Community Futures	• Assist existing and new small businesses with training, loans, counseling and resources including:
	    • Marketing support and Advocacy
	    • Business advice and coaching (Basin Business Advisors program – one on one as well as workshops)
	    • Small business loans up to $500,000.
	• Deliver's the Province's 48 week long Self Employment Program that helps participants develop and launch their own businesses.
	• The only organization throughout rural BC with a mandate for small business and community economic development.
	• Community Futures BC provides a communication link between Community Futures offices in BC and Western Economic Diversification, Community Futures Pan West, and Community Futures Network of Canada.

Trade and Invest BC	• Trade and Invest B.C. works with international enterprises to help them build strong links to the resources, skills and businesses that make British Columbia an attractive place to work and invest. • The B.C. Business Network, profiling British Columbia products and services to international buyers. • Includes investment opportunities in: Agrifoods, Forestry, Mining, Technology, Tourism. • Profile information on all eight large economic regions. Within these regions are 27 regional districts, 162 incorporated municipalities and more than 200 First Nations.

Regional	
Description/Mandate	**Key Initiatives**
Columbia Basin Trust (CBT)	The CBT was created in 1995 to support efforts by the people of the Basin to create a legacy of social, economic and environmental well-being in the

"$31 million in programs and services delivered to the basin last year"…July 27, 2016 News Release *"20 projects receive $1 million under Recreation Infrastructure Grants"….September 2, 2016 News Release* *"Over 160 arts, culture and heritage projects have received a total of $706,000 in funding support for 2016-17 season….*	Canadian portion of the Columbia River Basin—the region most affected by the Columbia River Treaty (CRT). $45 million endowment funds must be allocated to the region, representing a fair share of the ongoing benefits being realized outside of the Basin as a result of the CRT. Currently CBT has 13 Strategic Priorities: • Affordable Housing • Agriculture • **Arts, Culture and Heritage** • Broadband • Community Priorities • Early Childhood and Childhood Development • **Economic Development** • Environment • First Nations Relationships • Land Acquisition • Non-Profit Support • **Recreation and Physical Activity** • Renewable and Alternative Energy • Countless projects throughout the planning area have been funded through CBT.
Southern Interior Development Initiative Trust (SIDIT)	• In 2006, the government of British Columbia enacted legislation launching the Southern Interior Development Initiative Trust with a $50 million one-time allocation paid into a Regional Account. The objective of the Southern Interior Development Initiative Trust is to help grow and diversify the economy of the Southern Interior of British Columbia through economic development initiatives. • SIDIT's funding programs are specifically targeted toward investments in self sustaining projects. • Communities include: Hope, Osoyoos, Princeton, Keremeos, Cranbrook, Fernie, Sparwood, Castlegar, Creston, Salmo, Grand Forks, Greenwood and Midway. • Funding projects include: Kootenay Region Association for Community Living, Creston, BC – $20,000; Creston and District Community Resource Center Society – $50,000; Cranbrook Society for Community Living; TOTA – $50,000; Regional District Okanagan Similkameen – $17,500; Okanagan Similkameen Film Commission – $13,250; Nk'Mip Desert Cultural Centre – $48,250; Organic Farming, Keremeos – $30,000; Christina Lake Chamber of Commerce – Christina Living Arts Centre -$150,000; City of Castlegar – Hazard Beacon Project - $150,000; Nelson Civic Theatre $10,000; City of Nelson Broadband Initiative $50,000; City of Trail Fibre Broadband Commercialization $50,000; City of Rossland fibre network $50,000. BlackJack Cross Country Ski Club (Rossland) $50,000 in 2010 + $10,000 for trail improvements; Red Mountain Ski Resort (undisclosed $). • The Boundary communities of Midway, Greenwood, Area E and Rock Creek are raising $8.4 million to purchase the vacant Pope & Talbot mill

	operations in Midway. The mill will be the largest direct and indirect employer in the Boundary area.
Southern Interior Beetle Action Coalition *"Since inception, SIBAC has supported over 92 community projects and provided over $1.8million in funding which was leveraged an additional $14.2 million."* www.sibacs.com	• Represents 9 Regional Districts and 6 Tribal Councils in the Southern Interior to encourage greater access to rural investment capital. SIBAC is currently focusing on three major activities: 1. Encouraging the Provincial Government to create a BC equivalent to the Nova Scotia program; 2. Supporting the creation of the Christina Lake Venture Capital Corporation; and 3. Sponsoring a major project to bring the Unleashing Local Capital Project to BC. • Recent SIBAC funded community projects in the planning area include: West Kootenay Route Tourism Business Plan 2015; Columbia Cultural Tourism Strategy 2014; Mapping Visitors to the Columbia Valley Final Report 2013; Invest Kootenay Strategic Planning 2011; Invest Kootenay Strategic Planning 2011; BC Rural Network – Rural Communities Summit Kaslo June 2014; Columbia Discovery Centre; Canal Flats Final Report 2014.
Imagine Kootenay Partners from Highway #3 include: City of Castlegar; District of Sparwood; City of Fernie; City of Nelson and CSRD Areas E & F; Cities of Trail, Rossland and Area. Other partners include: City of Revelstoke and CSRD Area B, Town of Golden and CSRD Area A, Kootenay Lake (RDCK Area A), Columbia Valley Region (Invermere, Radium Hot Springs and Canal Flats; RDEK Areas F&G), Boundary Region, Village of Nakusp.	• Imagine Kootenay (IK) is managed and administered by Community Futures Central Kootenay. IK is a joint-initiative of local governments, economic development organizations and Chambers of Commerce with the aim of attracting and supporting investment and workforce development throughout the Kootenay and Boundary region. • Current Imagine Kootenay • www.imaginekootenay.com promotes opportunities to live, work and invest in the Kootenays • Showcases the outstanding work, business and lifestyle opportunities that raises the profile of the Kootenay region. • Provides interested investors up-to-date information about a community's business environment. • Improves investor readiness at the community level by providing tools and facilitating planning. • Connects people to the variety of employers and opportunities available within the Kootenay region.
Community Futures of Greater Trail	• South Kootenay Business Centre – office space resources and in-house mentoring • Small business and micro loans • Deliver's the Province's 48 week long Self Employment Program that helps participants develop and launch their own businesses.
Airports	• West Kootenay Regional Airport (Castlegar): Daily flights to/from Vancouver and Calgary, 12,500 annual aircraft movements, and 74,000 annual passengers. • Canadian Rockies International Airport (Cranbrook): The airport is mid-process in developing an extensive sustainability plan, including a goals and results matrix.

Fraser Valley Regional District	• The FVRD includes six municipalities and eight electoral districts (includes Hope). • FVRD manages 10 regional parks, including Thacker Regional Park in Hope. • FVRD Plan has a focus on building tourism, including outdoor recreation and agritourism.
Regional District of East Kootenay	• Services provided include: land use planning, water supply, sewage disposal, fire protection, recreation, mosquito control, street lighting, community parks, emergency management programs, solid waste and recycling, transit, 9-1-1, library grants, regional parks, and invasive plant control. • The East Kootenay Integrated Lake Management Partnership (EKILMP) is a coalition of various agencies, local governments, First Nations and non-government organizations with joint responsibilities to protect lake ecosystems[37]. The mandate of the partnership is to maintain the integrity of lake ecosystems for fish, wildlife, drinking water, heritage, recreation and aesthetic values. • Several plans are underway[38]: o Jaffray & Elko Area Official Community o Wasa and Area OCP Plan Update
Regional District of Central Kootenay (RDCK)	• Operates 22 regional parks including Great Northern Trail (RDCK has a license of occupation from the Province for this trail). • Developed the RDCK Castlegar Recreation & Culture Master Plan 2016. • Completed an Agricultural Area Plan. • Undertaken research into Heritage Planning. • The Kootenay Lake Partnership is a multi-stakeholder initiative which has been developed to support a productive and healthy Kootenay Lake ecosystem into the future. The project envisions balanced land and water uses that sustain environmental, community, recreational, aboriginal, cultural, traditional, and aesthetic values. • Operates the Visitor Centre in Creston. • Partners with the Town of Creston to explore the creation of a Creston Valley DMO.
Regional District of Kootenay Boundary (Areas A & B)	• Strategic plan from 2012-2015 • Manage CBT community initiatives funds for RD – funded projects in 2016/17 relevant to destination development include: Black Jack Cross Country Ski Club – Skier Development Program; Greater Trail Creative Activities Centre Society for the Visual Arts – VISA Gallery & Studio Upgrade; Kootenay Columbia Trails Society – Trail Construction; Rossland Council for Arts & Culture – Sculpture for downtown Rossland; Rossland Fall Fair; Rossland Gold Fever Follies; Rossland Historical Museum Association; Rossland Lions Campground – signage upgrade;
Regional District Okanagan Similkameen	• Represents City of Penticton, the District of Summerland, the Town of Osoyoos, the Town of Oliver, the Town of Princeton and the Village of

[37] http://www.rdek.bc.ca/departments/planning/ekilmp/
[38] http://www.rdek.bc.ca/departments/planning/plans/

	Keremeos, Kaleden/Okanagan Falls, Naramata, Okanagan Lake West/West Bench, Keremeos, Rural/Hedley, Cawston. • The South Okanagan Regional Growth Strategy (RGS) was launched in 2004, adopted in 2010, amended in 2011, and updated in 2016. It is a partnership between the Regional District Okanagan-Similkameen (RDOS), the City of Penticton, the Town of Oliver, the Town of Osoyoos, and the District of Summerland to manage growth in the South Okanagan in manner that is consistent with long-term social, environmental and economic objectives. • Regional Heritage Strategic Plan (RHSP) was adopted in 2016.
Kootenay Rockies Tourism	• KRT is contracted as a representative of Destination BC. KRT delivers marketing tactics on behalf of the Touring & Exploring sector and works with Destination on program delivery, such as Remarkable Experiences and Destination Development, Cooperative Marketing Programs, media relations and travel trade. • KootenayRockies.com is the official regional consumer website for the Kootenay Rockies region. It includes an inventory of all tourism product in the southeastern corner of BC. • Delivers industry development initiatives such as the annual industry conference.
Thompson Okanagan Tourism Association	• TOTA works to support the ongoing growth and sustainability of the regional tourism industry through destination marketing, management and industry development. • TOTA is contracted as a representative of Destination BC for Touring & Exploring marketing programs, Remarkable Experiences and Destination Development, Cooperative Marketing Programs, media relations and travel trade. • TOTA specific regional programs include: Aboriginal tourism, Charter of Sustainability, HR, Regional Rail Trails, and Wonder of Winter. • Manages promotional development and marketing activities for Route 97 (joint project with North Central Washington), Similkameen Valley and Boundary Country (represents Beaverdell, Bridesville, Christina Lake, Grand Forks, Greenwood, Midway, Rock Creek and Westbridge, and home to Big White).
Our Okanagan	• Our Okanagan is an independent steering committee with representation from the Community Futures of the Valley, Okanagan Partnership, Accelerate Okanagan, Chambers of Commerce and the Economic Development Community. Our Okanagan is an online tool developed to address challenge of connecting those with needs to those that can address them, creating more opportunity for all.
University of the Fraser Valley, Hope Centre	• Offers courses in: Hospitality and Event Management Post-degree certificate, and Hospitality Event Planning.
Selkirk College (Castlegar) **Columbia Basin Rural Development Institute**	• Selkirk College main campus located in Castlegar with campuses in Nelson and Trail; Learning Centres in Kaslo and Nakusp; approx. 2,400 students including ~300 international students; wide range of programs offered including a strong tourism and hospitality program (including: Cook Training, Professional, Culinary Management, Golf Club Operations, Post

www.cbrdi.ca	Graduate Diploma in Culinary Management, Post-Graduate Diploma in Hospitality Management, Resort and Hotel Management, Ski Resort Operations and Management). • The Rural Development Institute (RDI), at Selkirk College, is a regional research centre with a mandate to support decision-making by Columbia Basin-Boundary communities through the provision of information, applied research and outreach and extension support: • Supports the efforts of economic development groups through the provision of relevant and timely research and best practice tools and processes; - Engages rural revitalization research; - Assists in regional economic diversification through the promotion of innovation and knowledge transfer; - Builds capacity through collaborative working partnerships with existing organizations, networks and experts.
College of the Rockies	• Creston has a College of the Rockies campus with several tourism programs including: Adventure Tourism Business Operations, Mountain Adventure Skills Training, Recreation Leaders, Tourism and Recreation Management.
University of British Columbia - Okanagan	• The University offers undergraduate and graduate courses in Arts and Business, among others, but not tourism specific courses. Also, engages Aboriginal people in mutually supportive and productive relationships, and works to integrate understandings of Indigenous cultures and histories into its curriculum and operations.
Okanagan College	• Their programs in Culinary Arts, Tourism and Hospitality (2-year diploma or 4-year degree in Business Administration) and Viticulture and Wine Studies reflect the Okanagan Valley's natural environment.
Boundary Country Regional Chamber of Commerce	• Provides an information hub for local business owners, investors, and residents. • Represents: Christina Lake, Grand Forks, Greenwood and Midway.
South Okanagan Chamber of Commerce	• The Chamber has a regional focus and works closely with other stakeholders and partners in Osoyoos, Oliver, Okanagan Falls and beyond. 'Our motto for our South Okanagan communities and businesses is to unite, connect, and prosper.'
Lower Columbia Initiative Corporation	• Economic development initiatives for Rossland, Trail, Montrose, Fruitvale, Warfield and RDKB
Community Futures Boundary	• Community Futures is a community- based economic development program that helps rural communities build sustainable economies across Canada. • Represents (Christina Lake, Grand Forks, Greenwood, Midway, Rock Creek, Bridesville, Christian Valley, Westbridge, Beaverdell, and Big White)
Fraser Basin Council (FBC)	• FBC is a collaboration of four orders of government (federal, provincial, local and First Nations) along with those from the private sector and civil society. FBC has helped people learn about sustainability, resolve

	conflicts, and roll out partnership initiatives with a focus on climate change and air quality, watersheds and water resources, and local sustainability and resilience.
BC Rural Network (BCRN)	• BCRN is a coalition of organizations, communities, and individuals who share a commitment to building the capacity of British Columbia to develop responses to rural and remote community issues.

First Nations	
Description/Mandate	**Key Initiatives**
Stó:lō Nation	• The Stó:lō Nation represents 11 Bands. • Aboriginal Skills and training, including SASET Culinary Program, BladeRunners Program, First Nations Jobs Funds. • Cultural Heritage and Archives • Cultural Education and Tourism • Tours are offered at the Shxwt'a:selhaxwxt Interpretive Centre, the Stó:lō Ethnobotanical Garden, the Coqualeetza Longhouse and grounds as well as the Stó:lō Resource Centre and Stó:lō Gift Shop. Plans to enhance tourism efforts and improve the website and booking services.
The Okanagan (Syilx) Nation	• The Okanagan Nation Alliance (ONA) represents eight member communities and promotes business development, fisheries and aquatics, natural resources and land use and wellness. • The Okanagan Nation Territory includes the following watersheds: Okanagan Basin, the Similkameen Basin, and the Kettle Basin, as well as parts of the Columbia Basin (Columbia River and Arrow Lakes) and Thompson Basin (Shuswap River and Salmon River). The ONAFD works to provide technical fisheries assistance for the Nation and it's eight member communities ands and acts as a liaison with federal and provincial fisheries agencies.
Ktunaxa Nation	• The goals of the Ktunaxa Nation Council include preservation and promotion of Ktunaxa traditional knowledge, language and culture, community and social development and wellness, land and resource development, economic investment and self-government. • It is also the goal of the Ktunaxa Nation Council and its member Bands to work with neighbours and build strong relationships to strengthen the regional economy within the Kootenays. • Lower Kootenay band has purchased Ainsworth Hotsprings and has plans for additional Aboriginal cultural interpretation and experiences (hiking, boat tours).
Yale First Nation (Hope)	• Independent First Nation with approximately 160 band members living on and off reserve. • The Yale Natural Resource Department coordinates consultation with various levels of government and industry on all activities that may adversely impact lands, resources and cultural heritage resources.

Sinixt Nation (Interior Salish)	• A British Columbia Supreme Court Land Claim was filed in 2008 by Sinixt Nation representatives on behalf of the collective rights of all Sinixt descendants in regards to the lands described as Sinixt Territory. Corporations, Provincial and Federal governments and their agents and employees are required to consult with the Sinixt Nation in regards to developments and business operations and land use and resource extraction within Sinixt Territory as stated by both international and domestic law. • No current tourism ventures – focus is on recovering status as a First Nation and having associated rights recognized related to their traditional territory that were eliminated when declared extinct.

Communities/Local	
Description/Mandate	**Key Initiatives**
District of Hope	• The District of Hope's Integrated Official Community Plan was presented to Mayor and Council for their consideration at the end of June 2016. • This combined Integrated Community Sustainability Plan, Official Community Plan update, and Age Friendly Plan sets the future direction for land use and development, mobility, infrastructure, community health and safety, and climate-action in the District. • In conjunction with the Fraser Valley Regional District, the District of Hope developed an online mapping service for residents and visitors.
AdvantageHOPE	• AdvantageHOPE is Hope's Economic Development and Tourism Agency (DMO). • Economic development and growth is achievable through tourism development and similar initiatives that recognize the unique 'hub' of its location and unique natural assets. • The AdvantageHOPE workplan includes the goal of increasing Hope, Cascades & Canyons' profile as a destination and working towards recognition as both a Destination Marketing Organization (DMO) and one of BC's official Resort Municipalities. • Operates the Visitor Centre (40,000 visitors and prospective residents). • Works with Scenic 7 cooperative marketing group (Coquitlam to Hope), with a focus on road trip touring.
District of Sparwood	• Goals include: Encourage, promote, and celebrate local heritage, culture, and arts; and Enhance the downtown by promoting high quality design and construction that reinforces Sparwood's unique sense of place and become the social, cultural, and economic centre of the community with opportunities to live, work, learn, shop, and play.
City of Greenwood	• Canada's smallest City. • Promote and protect heritage resources.

City of Grand Forks	• The community has been home to a large Doukhobor population since the early 1900´s and continues to celebrate and embrace their rich culture.
Boundary Country	• Official Visitor website. • Represents: Beaverdell, Bridesville, Christina Lake, Grand Forks, Greenwood, Midway, Rock Creek and Westbridge, and home to Big White.
City of Castlegar	• Executes on the Official Community Plan. • Millennium Park investment in natural swimming ponds (opened in 2014). • Supports Castlegar Sculpture Walk. • Castlegar is a regional hub for the Central Kootenays. The West Kootenay Regional Airport provides regular service to Vancouver and Calgary. • Developed a comprehensive Community Plan. • Focus on diversifying the economy.
Castlegar Chamber of Commerce	• Encouraging a business and visitor friendly experience. • The Chamber is committed to working to enhance the community's quality of life by encouraging growth in commerce and supporting sustainable development.
Destination Castlegar	• DMO for Castlegar. • Provides visitor information.
City of Cranbrook	• Stimulating more opportunities in the knowledge-based, technology and creative sectors through such actions as improved access to broadband (fibre optic) services. • Continuing to support entrepreneurial/niche business opportunities.
Cranbrook Chamber of Commerce	• The Chamber aims to strategically direct policy and lobby to ensure a successful and sustainable future for the economy of Cranbrook. • Provides visitor information.
Cranbrook Tourism	• DMO for Cranbrook.
City of Fernie	• To strengthen the tourism economy, Fernie needs to grow visitation. This includes encouraging visitors to stay longer and spend more. A diversified economy supports overall community prosperity in keeping with the values of the City of Fernie Official Community Plan and Strategic Plan.
Fernie Chamber of Commerce	• The Chamber is a is a service organization that is dedicated to enhancing the economic future of Fernie and the quality of life for the residents.
Tourism Fernie	• DMO for Fernie.

	• Developed a 5-year strategic plan. To strengthen the tourism economy, Fernie needs to grow visitation. This includes encouraging visitors to stay longer and spend more. • Developed the Fernie and Elk Valley Cultural Guide. • Designated recipient for the MRDT program (2%).
Town of Princeton	• The Official Community Plan of 2008 is being reviewed in 2016. • The plan will recognize existing conditions and trends, notably the importance of the natural environment and community growth management, and the preservation and enhancement of Princeton's social character and sense of place.
Destination Osoyoos	• DMO for Osoyoos. • Provides visitor information and information on relocating for 'SnowBirds".
Town of Osoyoos	• Osoyoos is a Resort Municipality. • The Town is currently in the process of developing a Parks and Trails Master Plan[39]. • Designated recipient of MRDT program (2%).
Town of Creston	• Executes on the Official Community Plan (OCP review underway in 2016) and Cultivating Creston – Integrated Community Sustainability Plan adopted in 2013 (timeframe to 2030) is the vision, plan and process for continued success to the year 2030, and a way to position the Town of Creston and the Creston Valley for ongoing success and sustainability in the longer-term. • 2015-2017 Corporate Strategic Plan identifies many strategies – of relevance to destination development – strategy to connect town trails to regional trail network; have also identified need for affordably housing. • Permanent market park for Creston Farmers Market in progress. • They have also developed an Integrated Community Sustainability Plan, Age-friendly Action Plan and a Youth Action Plan.
Creston Valley Chamber of Commerce	• The Creston Valley Chamber of Commerce is an advocate for business in the region. • Developed the Creston Valley Food Hub website in partnership with the Creston Valley Food Action Coalition.
Fields Forward Creston	• Community juicer being purchased as a social enterprise.
Creston Valley Tourism	• Pursuing MRDT application and explore the creation of a DMO. • Provides visitor information for the following Communities: Town of Creston, Erickson, Lister, West Creston, Wynndel, Yahk, Lower Kootenay Band and East Shore Kootenay Lake.

[39] http://www.osoyoos.ca/content/parks-and-trails-master-plan

Village of Keremeos	• Called the "Orchard Village", Organic Capital of Canada and the Fruit Stand Capital of Canada. • In Sept 2016, they presented a plan to improve the visual appeal of Downtown Keremeos (Downtown Enhancement report). • Developed an age-friendly action plan in 2015.
Similkameen Valley Tourism	• DMO for Similkameen Valley. • Official visitor website for the Similkameen Valley, including Cathedral Lakes, Cawston, Chopaka, Coalmont, Eastgate, Hedley, Keremeos, Manning Park, Olalla, Princeton, Similkameen Valley, Tulameen and Twin Lakes.
Similkameen Country	• Promotes community, local businesses, and tourism in the area.
Village of Midway	• Provides information to visitors and those looking to relocate.
Village of Salmo	• Sustainable Salmo is a planning process (2016-2017) to update the Village's Official Community Plan in a way that is sustainable and inclusive. Project partners include the Village of Salmo, Central Kootenay Regional District, Fraser Basin Council, Interior Health, and Flipside Sustainability. • The Village has also developed an Age-Friendly Action Plan.
City of Nelson	• Executes on the Official Community Plan and Path to 2040 Sustainability Strategy; 2015-2018 Strategic Plan with four strategic goals: Enhance Sustainability of City Services and Infrastructure; Strengthen Neighbourhoods; Expand Local Jobs, Local Prosperity; Achieve Excellence in City Governance. • Major projects include: Hall Street Corridor to waterfront; Railtown Sustainable Neighbourhood plan; downtown public realm plan including effective use of landscaping and public art; develop central and east waterfront neighbourhoods including planned amenities; affordable housing identified as need in Housing Strategy. • Specific strategy in 2015-2018 to facilitate vibrancy in sport, culture and recreation to enhance economic growth through partnerships, events, festivals and business development. • Cultural Collaboration and Recreation Master Plan. • Recently renovated and expanded aquatic and fitness centre; multi-use arena and Civic Arena.
Nelson Kootenay Lake Tourism Society	• DMO for Nelson, Kootenay Lake, Kaslo including Balfour, Ainsworth and Lardeau • Designated recipient for the MRDT program (2%).
Nelson & District Chamber of Commerce	• The Nelson & District Chamber of Commerce supports: - Expanded and diversified small business and tourism sectors. - Development which recognizes heritage and environmental values. - Artistic, cultural and educational activities. • Houses and operates the Nelson Visitor Centre.

Nelson and Area Economic Development Partnership	• The NAEDP is a partnership between the City of Nelson, Community Futures Central Kootenay, the Nelson & District Chamber of Commerce and RDCK Areas E and F. The partnership's goal is to take a unified approach to community economic development initiatives for the city and region.
City of Trail	• Executes on the Official Community Plan. • Significant projects include downtown revitalization, pedestrian/pipeline bridge across river, and Trail Riverfront Centre (Museum & Library). • Operates the Trail Memorial Centre, the Trail Aquatic and Leisure Centre, the Willi Krause Fieldhouse, and approximately 20 developed parks within the City of Trail.
Trail & District Chamber of Commerce	• Functions as DMO and works with Lower Columbia tourism collaborative. • Operates the Visitor Centre. • Business Excellence Awards.
City of Rossland	• Executes on the Official Community Plan and 5-year Resort Development Strategy as a Resort Community receiving RMI funding. • Significant projects include Miners Hall upgrades; working with the Rossland Council for Arts & Culture (RCAC) to restore and renovate the Rossland Miners Union Hall for use by all community members. The City of Rossland is the lead on the Exterior Renovation which includes restoration and preservation work on the roof and siding and includes replacing the leaking roof, replacing and painting damaged siding, removing the crumbling brick chimney and restoring heritage features of the façade. The Rossland Arts Council is the lead on the Interior Renovation which focuses on the renovation of the currently undeveloped Attic (4th Floor) into gathering places for the community, improvements to the Performance Hall and a heritage restoration of the exterior balcony. • Rossland Museum & Discovery Centre/Visitor Centre upgrades - $3 million phased renewal project - **Phase I**: Renovation of the Entry Gallery (entrance gallery space, archives, offices, washrooms, and more) – $480,000. - **Phase II**: Mine Experience (replacement of Black Bear Mine tour) – $700,000. - **Phase III**: Atrium (addition to main building) – $450,000. - **Phase IV**: Industrial Shed (new building on property to house major equipment for display) – $500,000. - **Phase V**: Sign / Sitework / Exterior (exterior work of main building) – $375,000. - **Phase VI**: Interior Renovations (interior exhibitions and mechanical/electrical in main building) – $450,000.

Red Resort Association	• Legislated mountain resort association on lands at the base of Red Mountain collects annual membership fees and contributes to Tourism Rossland for destination promotion.
Tourism Rossland	• DMO for Rossland; also project manages RMI funding on behalf of the City of Rossland and is lead on Lower Columbia tourism initiatives. • Designated recipient for the MRDT program (3%).
Village of Warfield	• Executes on the Official Community Plan. • Operates Community Hall and Village Square Park.
Village of Montrose	• Executes on the Official Community Plan.
Village of Fruitvale	• Executes on the Official Community Plan. • Champion Lakes municipal golf club.
City of Kimberley	• Executes on the Official Community Plan and 5-year Resort Development Strategy as a Resort Community receiving RMI funding. • The city is a pioneer in economic resilience, shifting focus to a more diversified economy and further developing its tourism industry after an era of mining. • Consistent Branding with the City of Kimberley, Tourism Kimberley, the Kimberley Chamber of Commerce and the Kimberley Conference Centre. • The City has a developed Tourism Plan and Cultural Plan.
Kimberley Conference & Athlete Training Centre	• The 24,000-square foot Centre is the largest meeting facility in the East Kootenay region. It also houses Kimberley's Athlete Training Centre, a professional fitness and ski tuning facility ideal for competition preparation and hosting sporting events.
The Kimberley and District Chamber of Commerce	• Mission is to serve as leaders in the promotion, development, growth and prosperity of business in our community. • Goals include the delivery of Best Practices in governance, communication, community partnerships and member value. • Designated recipient for the MRDT program (2%).
Tourism Kimberley	• DMO for Kimberley (administers MRDT revenue) • Operates the visitor centre.
Okanagan Falls Visitor Information Centre	• Provides visitor information for the Valley.
Town of Oliver	• The Town is currently working on a project to review and update their Official Community Plan. • The Town has a grant from the Province's Rural Development Fund to create a revitalization action plan for the downtown. The Action Plan will identify and prioritize several projects for the Town and community partners. This action plan will build on other efforts,

	including the current OCP update and the South Okanagan Chamber of Commerce's work.
Oliver Tourism Association	• DMO for Oliver. • Their tourism plan that was created through the Community Tourism Foundations® program in partnership with the community areas of the Town of Oliver and the Electoral Area C of the Regional District of the Okanagan-Similkameen.
District of Elkford	• While Elkford continues to have strong economic and social connection to the mining industry, several trends will have a pronounced and profound growth influence on Elkford's future: - Modest expansion of community population with anticipated mine employment expansion. - Growth of the regional tourism industry (related to Fernie growth). - Anticipated long-term expansion of the local mining industry. - Exponential growth in mountain property and project investment originating most specifically from Calgary but also including Vancouver and North America.
Elkford Community Conference Centre	• The 1,800-square-metre building features a Visitor Centre, playschool, commercial kitchen, banquet hall with a stage for the performing arts, multi-purpose meeting rooms as well as historical displays.
Elkford Chamber of Commerce	• Goals are to continue being a strong advocate and supporter of local business, a valuable support system and an effective network provider.
Town of Hedley	• Provides information to visitors and residents on activities, events etc. through their website: hedley.ca.
Fort Steele Heritage Town	• The Friends of Fort Steele Society took over full management of operations in 2004 under a long-term contract with the Province of British Columbia. • The Friends are striving to build a sustainable future for Fort Steele by continuing conservation initiatives, building community partnerships, developing a sustainable funding model, and providing visitors an experience that truly enables them to visualize a day in the life of Fort Steele in its heyday. • The Wasa Hotel and Museum are currently (Jan 2017) in the process of being renovated.

5.2 Past Tourism Planning Initiatives

In total, there are over 100 plans and reports that have been reviewed to identify the past tourism planning initiatives. A recap of the most significant plans and projects has been included here. For a full list of the plans, see Appendix 9.1.

5.2.1 First Nation Articulation, Official Community Plans and Regional District Plans

A review of the articulation from First Nation communities, Office Community Plans, Regional District Plans and Sustainability Plans revealed significant similarities. The following common language was found throughout multiple documents and shows general intent for similar visions of what life in a community along the Highway #3 corridor aspires to be:

- Honour and respect our individual and shared history, traditions and culture.
- Recognize, preserve and protect our way of life and all that makes communities along Highway 3 unique.
- Sustainable businesses and economic development to encourage youth to stay/return and provide economic opportunity that in turn attracts a viable population base.
- Drive entrepreneurship and innovation.
- Respect for, and protection of, the environment and natural assets – seven generations considered in decision making.
- Active living in the outdoors.
- Support and celebrate diversity of people and lifestyle choices.
- Urban density – vibrant, walkable town/village centres with a viable resident base.
- Value of waterfront access and lake/river based assets/experiences.
- Improved safety for those travelling along Highway 3.
- Managed housing – affordability and availability.
- Initiatives to retain youth within communities.
- Respect different industries and shared land uses.
- Ensure sustainable food resources and land use value.
- Improve tourism market readiness, and provide quality experiences.
- Maintain and enhance festivals and events.
- Improve partnerships and collaboration between communities and organizations.
- Increase knowledge and awareness across the communities of entire Highway #3/3A/3B.

5.2.2 Trails Plans

The amount of effort applied to the development of trail plans and the support for the strategies highlights trails as a significant product for Highway 3 with identified potential for increasing tourism visitation. Multiple plans demonstrate broad acceptance of trail development, maintenance and marketing, including: *Trails Strategy for British Columbia, 2012* (Provincial Trails Strategy); *Thompson Okanagan Regional Rail Trails Tourism Strategy, 2016; Regional District Okanagan Similkameen Trails Master Plan, 2012;* Regional *District Central Kootenays Official Regional Parks Plan, 2009*; Trails to the Boundary Society website; and *Fernie Trails Master Plan, 2015*, as examples. Trail plans highlight:

- Continued support for the Trans Canada Trail as a world-class destination cycling trail.
- Integrate trail planning with the transportation network system.
- Maintenance of existing trails and legitimization of existing trails.
- Planning, development and management of proposed priority trails, including risk reduction, liability, and conflict reduction.

- Provide trails relatively close to settled areas to maintain accessibility, encourage utilization and minimize travel time and costs.
- Improve framework to manage motorized and non-motorized trail use agreements, ensuring both have viable opportunities for recreation.
- Integrate consideration of recreation trail use into resource road decisions.
- Establish reliable partnerships and funding models.
- Ensure connected trail networks that provide linkages among communities and regions, as well as nearby parks, natural areas and other assets.

5.2.3 Education

There are multiple plans that identify a concern with the ability to attract, retain and train employees that will stay, work and live along Highway 3. While education goes beyond the tourism sector, multiple initiatives within tourism have been highlighted within these plans, including new educational opportunities as identified within the *Selkirk College Strategic Plan 2013-2018; College of the Rockies Strategic Plan, 2015-2020; Sto:lo Nation 2015-2016 Annual Report;* and Hope Mountain Centre for Outdoor Learning and Okanagan Chefs Association websites, as examples. Education plans focus on:

- Increased focus on business administration and degree level training.
- Increased focus on economic development and sustainable community development studies.
- Continued focus on tourism fundamentals, outdoor recreation and adventure tourism training.
- Continued focus on culinary training.
- Increased opportunities for practicum placement, study exchange, and experiential learning.
- Promote professionalism in the food service industry.
- Aboriginal Cultural Tourism training.
- Provide connections within the tourism industry for jobs and job openings, e.g., provide a network for chefs and cooks.

5.2.4 Arts, Culture & Heritage

A significant number of community, economic development and sector plans articulate the desire to nurture and showcase the vibrant arts, cultural and heritage assets within the communities. Arts, Culture & Heritage is recognized within these following plans, among others: *Cranbrook Cultural Plan for Arts and Heritage, 2009; Kimberley Cultural Plan 2009; Our Heritage Historic Places, Heritage Strategy for BC;* and websites from multiple local organizations listed in Appendix 9.7

- Supporting capacity development to enable organizations to increase their impact, e.g., governance, staffing, volunteers.
- Strive for organizations to increase earned revenues and gain benefits from tourism.
- Increase collaboration and partnership between community groups.
- Enhance investments in infrastructure, e.g., new galleries, museums, heritage places.
- Build partnerships with First Nations to celebrate their unique heritage values.
- Raise the profile of local artists/artisans.
- Enhance or provide funds to support arts, culture and heritage.

- Increase awareness of the economic and social value of arts, culture and heritage.
- Integrate historic place conservation into related business sectors.
- Ensure a diversity in products and experiences reflecting and attracting a diversity in audiences.

5.2.5 Agricultural/Agritourism

Highway 3 has three significant agriculture plans that guide agriculture efforts, including: *Regional District Central Kootenays Agricultural Plan, 2011; Regional District East Kootenays Agricultural Plan Lower Columbia; Regional District Okanagan-Similkameen Agriculture Plan, 2011; Keremeos OCP*, *2013; Boundary Area Agricultural Plan 2012;* and information from organizations such as Creston Valley Food Action Coalition. These plans include the following connections to tourism:

- Strengthen the sustainability of farm organizations.
- Cultivation and mentoring of new farmers.
- Expand local market options, such as farmer's markets, street vendors, and other events and venues.
- Improve marketing of regional agricultural products.
- Further develop and promote culinary and agri-tourism experiences as value as diversification and value-added opportunities, e.g., fruit stands, home occupations and bed and breakfasts.
- Provide consistent information and support to farmers.
- Increase understanding of and support for farming in the general population.
- Preservation of the land base and water for food production.

5.2.6 Economic Development

Significant planning has occurred focused on economic development, including: *Hope Economic Development Strategy Update, 2015*; *Columbia Basin Business Retention and Expansion Project, 2015; South Okanagan Regional Growth Strategy (RGS), 2016; Osoyoos 2015-17 Resort Development Strategy; ImagineKimberley ICSP Document, 2011;* and *Columbia Basin Management Plan 2016-2020.* Economic development is also incorporated into multiple other plans, such as OCPs and information found on website such as the Okanagan Nation Alliance Business Development and Lower Columbia Initiatives.

Economic Development plans focus on:

- Thriving, diverse economies with greater self-sufficiency for present and future generations.
- Energized development based on new innovation, collaboration, creativity and ideas.
- Cooperation amongst communities, agencies and First Nations.
- Capacity building and enabling residents, organizations and communities to strengthen their knowledge, skills and capabilities.
- Working with Business Development Advisors.
- Create structures to better support economic development in the region.
- Implement new and innovative investment tools.
- Providing a business-friendly atmosphere for business attraction, retention and expansion.
- New resident attraction.

- Research and information collection and sharing to support decisions and educate local residents on economic indicators, drivers, and activities of interest.
- Advocating for grants and provincial/federal support.
- Collaboration on facilities and infrastructure.

5.2.7 Human Resources

Multiple plans cite staffing and human resource challenges, including the *Regional Tourism and Hospitality Industry Labour Demand and Supply Projections, 2013* (Vancouver, Coast and Mountains, Thompson Okanagan and Kootenay Rockies tourism regions); *Columbia Basin Management Plan 2016-2020*; and *Osoyoos Resort Development Strategy, 2015-17*. Areas of focus include:

- Focus on supporting industry with labour shortages. The accommodation industry, the food and beverage services industry and the recreation and entertainment industry are expected to generate the largest share of the projected labour shortages.
- Affordable housing development and workforce housing for staff and entrepreneurs.
- Training for frontline customer services and product knowledge.

5.2.8 Destination Marketing

Highway 3 includes multiple DMOs and four RMI communities – Osoyoos, Fernie, Kimberley and Rossland. The following strategic priorities were identified within their tourism plans:

- Strong focus on shoulder season marketing.
- Strong focus on festivals and events as a way to expand the season beyond peak visitor months.
- A focus on increasing the number of tourism businesses.
- A focus on increasing the length of stay.
- Strong focus on trails as a driver of visitation, with increased trail product and amenities.
- Improvements for signage and trailheads.
- Use of visitor surveys to collect more specific information.
- Offering shuttle services to connect resorts, communities and airports.
- Offering visitor services through visitor centres, social media and street teams. Also, training for front line and residents to act as visitor services ambassadors.
- Increasing groups and meetings, incentives, conventions and exhibitions (MICE) markets.
- Downtown vibrancy and beautification, including public art and heritage promotion.
- Improving marina and water-based facilities.

6 HIGHWAY 3 PERFORMANCE AND MARKET ANALYSIS

6.1 Tourism Performance

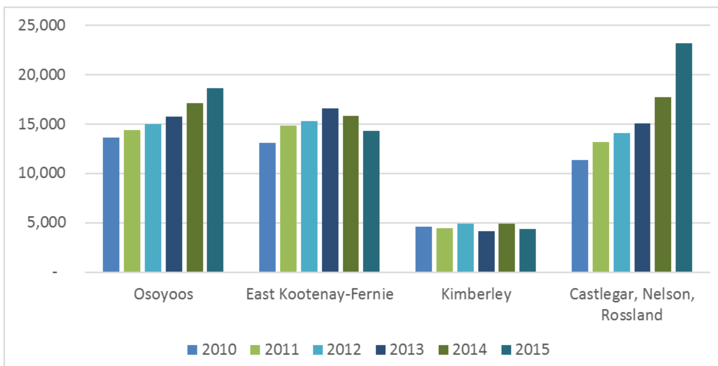
There are few indicators available to measure performance of the tourism industry at a local level. The data that exists includes: room revenue, highway volume, air passenger volume and visitor centre statistics.

Room Revenues

Accommodation room revenue and occupancy have not been measured since 2010 when the BC Government introduced the HST in 2011. Currently room revenues are only reported based on Municipal & Regional District Tax (MRDT) reporting, leaving communities who do not collect MRDT without an important metric. The following information has been provided using the most recent available data.

Year-over-year analysis of room revenue trends between 2010 and 2015 show strong growth in Castlegar/Nelson/Rossland and Osoyoos, however, room revenue has been declining in the East Kootenays-Fernie and fluctuating in Kimberley. These are the only communities along Highway 3 that collect MRDT. (Figure 19)

Figure 19: Room Revenue (in $000), Annually, 2010 -2015

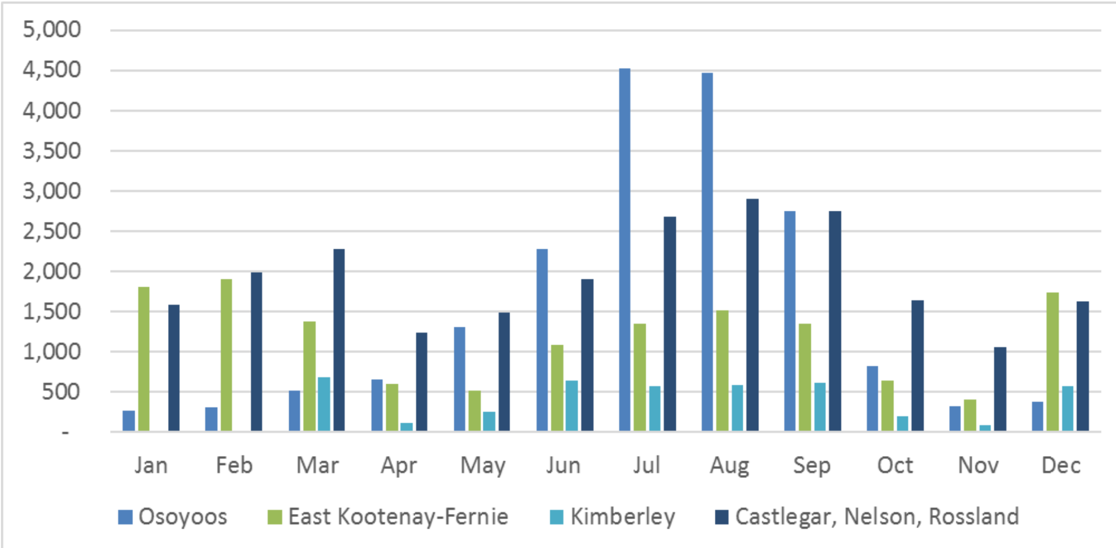


Source: BC Stats and Ministry of Finance; Sept. 23, 2016.

Accommodation Seasonality

Month-over-month analysis of room revenue for 2015 shows the highest growth in revenue for the summer months in Osoyoos, where as East Kootenay-Fernie has the highest revenue over the winter months. Castlegar, Nelson, Rossland and Kimberley have higher revenue over summer and winter months and lower revenue in Spring and Fall. (Figure 20).

Figure 20: Room Revenue (in $000), Monthly 2015

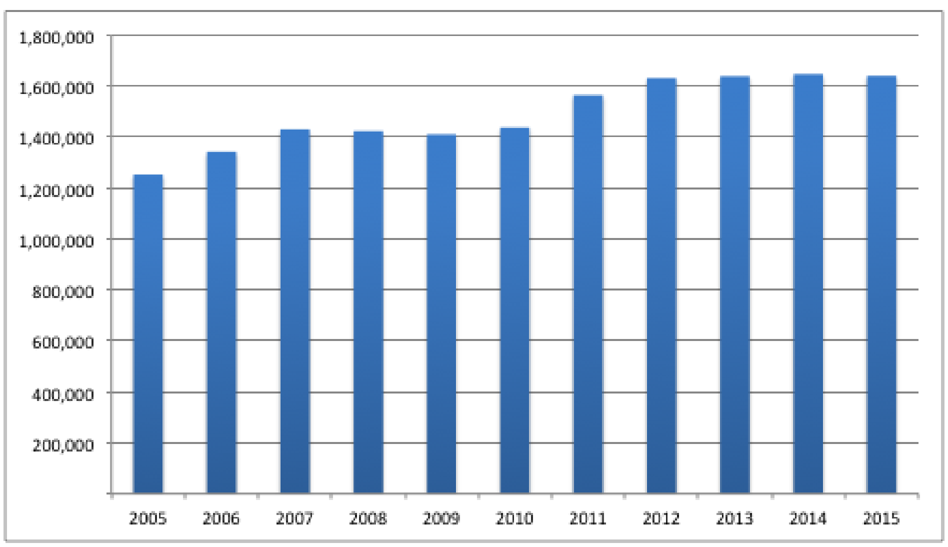


Source: BC Stats and Ministry of Finance; Sept. 23, 2016

Transportation

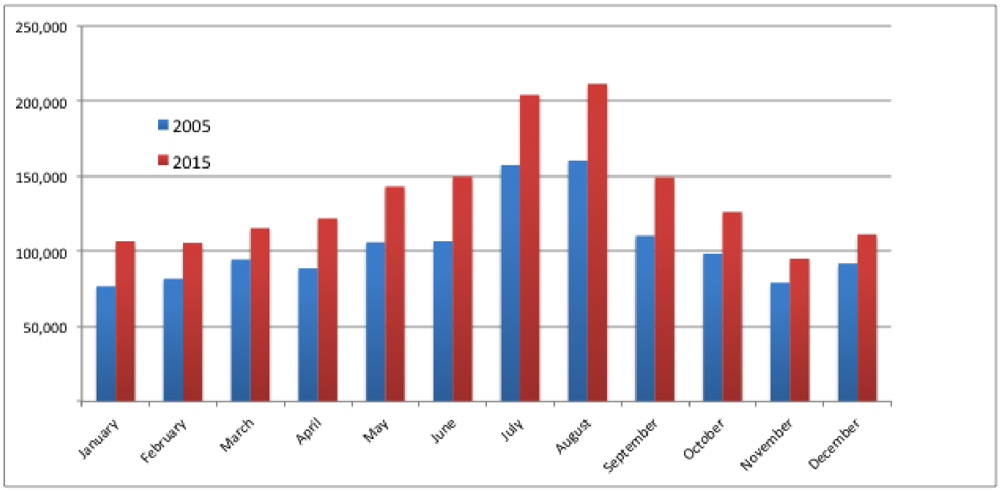
The Ministry of Transportation collects vehicle volume data. Based on the Crownest Pass tracker, vehicle numbers have grown from 1.2 million in 2005 to 1.6 million in 2015, with the highest volumes occurring during the summer months of July and August (see Figure 21, Figure 22).

Figure 21: Highway Traffic - Rte 3, W BC/AB border/Crowsnest Pass: Annual 2005-2015



Source: Ministry of Transportation and Infrastructure

Figure 22: Highway Traffic - Rte 3, W BC/AB border/Crowsnest Pass: Monthly 2005/2015



Source: Destination BC

Other sites along Highway 3 track between 500,000 and 1,650,000 annually, depending on location. The following traffic trackers demonstrate the annual volume by each site (including commercial, local and visitor traffic) as well as summer traffic (July/August):

- Othello at 0.2 kms east of Route 5: 524,870
  - 1,483 daily average in 2013; 2,814 daily average in summer
- Hedley: 1,001,560
  - 2,744 daily average in 2015; 4,590 daily average in summer
- Rock Creek: 622,690
  - 1,706 daily average in 2015; 2,718 daily average in summer
- Midway: 1,016,160
  - 2,784 daily average in 2016; 3,819 daily average in summer
- Walker Creek Rest Area (24 km east of Christina Lake): 930,385
  - 2,549 daily average in 2016; 3,500 daily average in summer
- Salmo (West): 977,835
  - 2,679 daily average in 2015; 3,662 daily average in summer
- Yahk: 1,651,990
  - 3,076 daily average in 2016; 4,526 daily average in summer

Several communities along Highway 3 are accessible by air including: Hope Airport/Aerodrome, Midway Aerodrome, West Kootenay Regional Airport (Castlegar), Sparwood/Elk Valley Airport, Cranbrook/Canadian Rockies International Airport, Osoyoos Airport and Grand Forks Airport. Destination BC tracks enplaned and deplaned passengers for Castlegar airport (see Figure 23).

Figure 23: Passenger Volume, Castlegar Airport 2015

Passenger Volume to Regional Airports

Enplaned and Deplaned

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Castlegar	2,315 -30.5%	3,536 -23.4%	5,496 8.1%	6,587 7.3%	8,040 13.3%	8,215 -5.3%	10,049 -2.0%	10,430 -1.7%	8,584 0.3%	7,442 -0.2%	3,065 -31.7%	3,444 -8.0%	77,203 -3.6%

Source: Destination BC

6.2 Key Markets

There is limited consumer data to support market visitation, however, when examining provincial, regional and local visitor centre data: the key markets are identified as BC residents and Albertan's, followed by visitors from other parts of Canada and Washington state. Destination BC has conducted market research into these key markets, highlights are provided below:

6.2.1 British Columbia Residents[40]

- In 2015, British Columbia residents accounted for 58% of BC's total overnight visitation and continued to be BC's largest market.
- BC captured 76% of all domestic overnight travel by British Columbia residents in 2015. This represents an estimated 11.2 million British Columbia residents travelling within BC in 2015 and approximately $3.6 billion generated in tourist receipts.
- All age groups are represented – 37% are aged 18-34 years; 36% are aged 35-54 years.
- 42% were travelling for leisure; 44% were travelling to visit friends/family.
- Average travel party size of 2.7 people.
- Average trip length 2.8 nights; 64% staying 1-2 nights; 28% staying 3-5 nights.
- 84% travel by auto/camper/RV.
- 6% visit Kootenay Rockies; 41% visit Vancouver Coast & Mountains and; 20% visit Thompson Okanagan regions.
- Travel throughout the year with peaks in July/August/September.
- Beaches, hiking/backpacking, visiting friends/family, camping, visiting parks, boating, wildlife viewing and fishing are most popular activities.
- 21% do not need accommodation; 29% book their accommodation directly.
- Explorer Quotient Traveller Type: 36% are Gentle Explorers; 17% are Free Spirits; 16% are Authentic Experiencers; 10% are Cultural Explorers.

6.2.2 Albertan Travellers[41]

- In 2015, Alberta residents accounted for 13% of BC's total overnight visitation.
- Accounting for 17% of all domestic visitation to BC, Alberta residents continued to be BC's second-largest domestic market.

[40] http://www.destinationbc.ca/getattachment/Research/Research-by-Market/North-America/BC.pdf.aspx
[41] http://www.destinationbc.ca/getattachment/Research/Research-by-Market/North-America/Alberta.pdf.aspx

- Alberta travellers took 2.4 million overnight trips to BC in 2015.
- All age groups represented; 39% are aged 18-34 years; 40% are aged 35-54 years.
- 55% were travelling for leisure; 35% were travelling to visit friends/family.
- Average travel party size of 3.1 people.
- Average trip length 4.4 nights; 36% staying 1-2 nights; 40% staying 3-5 nights.
- 75% travel by auto/camper/RV; 22% travel by air.
- 36% visit Kootenay Rockers; 27% visit Thompson Okanagan; 21% visit Vancouver Coast & Mountains.
- Travel throughout the year with peak travel in July/August (42%).
- 21% do not need accommodation; 29% book their accommodation directly.
- Hiking, beaches, visiting parks, boating, visiting friends/family, camping, and golfing are most popular activities.
- Explorer Quotient Traveller Type: 38% are Gentle Explorers; 21% are Free Spirits; 13% are Authentic Experiencers; 12% are Cultural Explorers.

6.2.3 Washington State Travellers[42]

- The US was BC's largest international market in 2015, accounting for 66% of BC's international overnight visitation.
- Washington travellers represented 45% of all US visitation to BC. This proportion increased from 41% in 2014.
- Washington State travellers took 1.4 million overnight trips to BC in 2015.
- 62% of travellers are aged 45 years or older; 45% are aged 55+ years; 23% are 65+years.
- 63% were travelling for leisure; 24% were visiting friends/relatives.
- Average travel party size of 3.0 people.
- Average trip length of 3.0 nights – 76% stay 1-3 nights.
- 83% travel by auto.
- 5% visit Kootenay Rockies; 75% visit Vancouver, Coast & Mountains and 9% visit Thompson Okanagan.
- Travel throughout the year with small peaks in July/August.
- 10% do not need accommodation; 28% book accommodation directly; 20% use an OTA; 32% still use a travel agent.
- Shopping, sightseeing, visiting friends/family, outdoor activities are the most popular activities.
- Explorer Quotient Traveller Type: 34% are Gentle Explorers; 18% are Authentic Experiencers; 15% are Free Spirits; 10% are Cultural Explorers.

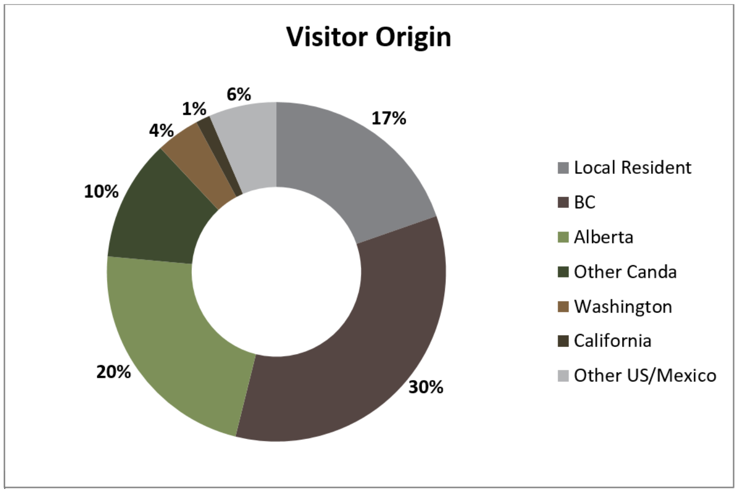
6.3 Visitor Characteristics

There are visitor centres in Hope, Sparwood, Cranbrook, Castlegar, Creston, Rossland, Kimberley, Trail, Nelson, Elkford, Hedley, Oliver, Fernie, Christina Lake, Greenwood, Grand Forks, and Osoyoos that collect visitor statistics.

[42] http://www.destinationbc.ca/getattachment/Research/Research-by-Market/North-America/Washington.pdf.aspx

The visitor centre statistics from 2015 indicates that communities along Highway 3 are primarily reliant on the BC market (30%), the second key geographic market is Alberta (20%), and the third is local residents (17%). (Figure 24)

Figure 24: Visitor Origin – 2 year average 2014/15

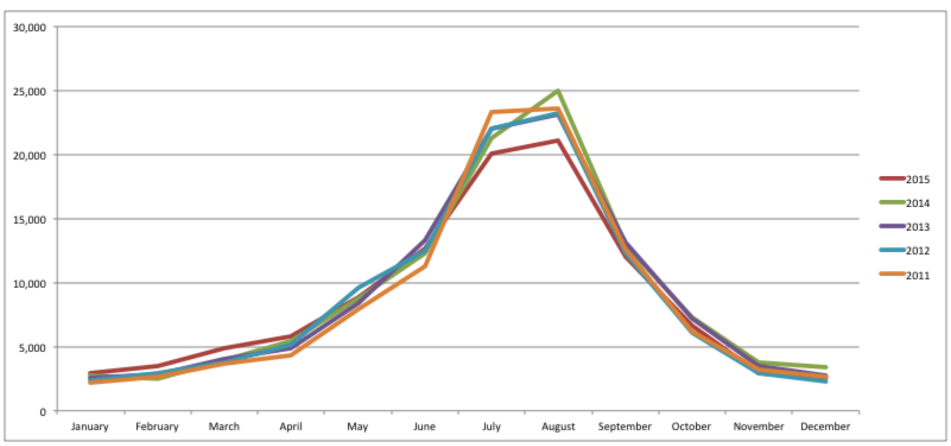


Source: Visitor Services Network Statistics Program, Destination BC

Visitors to visitor centres show significant same day trips (67%). 15% take one day trips and 8% two-day trips. Only 3% of visitors take a trip more than one week in duration.

The majority of visitor parties utilize visitor centres during the summer months. (Figure 25)

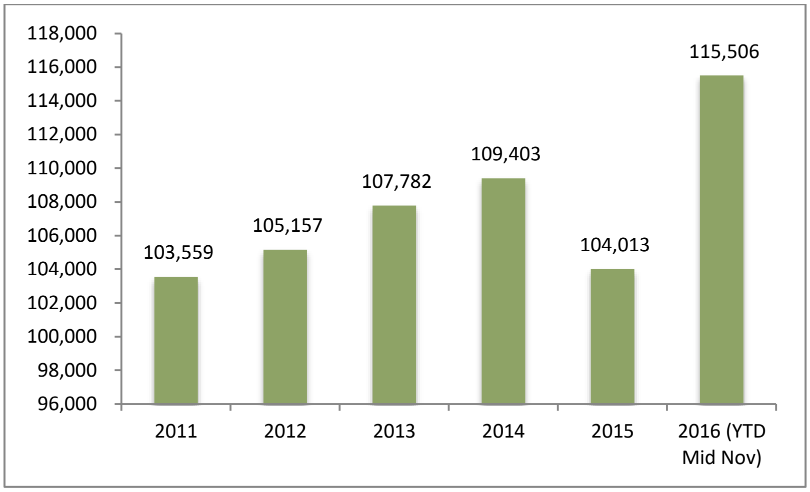
Figure 25: Total Visitor Parties - Monthly 2011- 2015



Source: Visitor Services Network Statistics Program, Destination BC

Total visitor parties have been steadily increasing since 2011, with the exception of 2015. Year-to-date data for 2016 shows a significant increase over all prior years. (Figure 26)

Figure 26: Total Visitor Parties - Annual 2011- 2016 (YTD Mid November)



Source: Visitor Services Network Statistics Program, Destination BC

6.4 Psychographic - Market Segmentation

Rather than marketing to or developing products for travellers based on traditional segments, such as demographics (e.g. age, gender, income) or geography, Explorer Types (EQ) emphasizes the importance of traveller segmentation based on their psychological characteristics, such as their attitudes, beliefs, values, motivations, and behaviours. When various psychological characteristics are combined, different types of travellers emerge.

Destination BC actively targets three of the twelve North American EQ segmentation types - Authentic Experiencers, Cultural Explorers and Free Spirits. For the Highway 3, the EQ type Gentle Explorer is also relevant as they are frequent travellers that return to past destinations and enjoy the security of familiar surroundings. (EQ types are outlined in Section 2.3.4)

Further, people are motivated to travel by their passions/interests, and research has shown that focusing on passions can create a higher potential for creating active consideration for BC and visitation to a destination.

Visitors to communities along Highway 3 may differ in a number of ways, including their expectations, attitudes, motivations, interests, passions, and willingness to pay for a tourism experience. It is important to consider these market segmentations in development plans. Currently, the following interest groups and passions are identified for Highway 3:

Touring/Road Trip	Hiking	Parks	Lakes/Boating	Skiing & Snowboarding
Camping/ Resorts	Cycling (road/mountains)	Agritourism &Wineries	Motorized Sports	Heritage

7 HIGHWAY 3 ASSESSMENT

This section outlines the assessment of Highway 3 as an overall tourism destination with an aim to highlight the key features and potential areas for destination development support and enhancement.

7.1 Summary of Demand Generators/Experience Enhancers

Based on stakeholder input during the four Session 1 meetings (Manning Park, Hope, Cranbrook and a webinar) the Highway #3 core attractors and demand generators to be enhanced and protected throughout destination development over the next 10 years are considered:

- The appeal of a slower, relaxing, scenic drive with multiple places to stop enroute to communities, attractions and destinations from Vancouver to the Alberta border.
- The uniqueness of each community along the corridor– the quirkiness, small town friendliness and the sense of place that attracts the many characters that call these communities 'home' and serves as a backdrop for authentic stories, old and new.
- A sense of place that embraces both an abiding zen-like calm and peacefulness, juxtaposed with asense of discovery, innovation and search for adventure.
- Incredible scenic beauty, healthy ecosystems (clean air, clean water, abundant wildlife, locally grown, organic foods) and relatively easy access to awesome outdoor adventure for every passion and almost every skill level supporting healthy living and personal growth/rejuvenation.
- Growing trail-based infrastructures attached to many of these authentic communities providing access for hiking, mountain biking, trail running as well as a variety of mechanized activities.
- Fresh, pure, rejuvenating water – lakes, rivers, hotsprings and all the associated water-based activities (paddling, angling, soaking…).
- Deep, consistent, quality snowfall combined with uncrowded, small-town experiences and easy access to backcountry via concentration of heli/cat skiing operators or self-propelled touring.
- Nostalgia from taking the route as a child during family vacations, and the appeal of reliving those positive memories while taking the open road now with family or friends.
- A depth and quality of culture, history and heritage manifested in artisan works, live music, theatre performances, public art, history and heritage, festivals and events.

7.2 Destination Assessment

A destination assessment is an integral component of Destination BC's destination planning program to provide an important overview of the strength of the planning area as a destination for visitors. The Assessment looks at the destination resources, assets, infrastructure and policies that make a destination competitive. The Assessment has been organized into four sections:

1. Destination readiness – looking at general attributes of the destination and travel to and within the destination.
2. Tourism assets and experiences – looking at the entire range of tourism resources and assets, and the delivery of experiences.

3. Support services infrastructure – looking at the infrastructure that supports the industry, such as the accommodation sector.
4. Enabling context – looking at the planning, policies and resources that enable the industry to thrive sustainably.

The intent for this project is to have a representative sample of industry stakeholders complete a quantitative assessment. However, this survey will not be complete until later in the process. As such, the information below has been provided by the facilitator, based on information provided in the process to date, including: stakeholders feedback on worksheets, interviews, in-destination site visits and Session 1 workshops, as well as the personal experiences from the facilitators and Destination BC project team travelling throughout the area.

This section of the report will be updated once the survey is active and complete.

Overall Assessment
Overall, the Highway 3 corridor has appeal as a travel route with multiple destinations either along the route (e.g., Manning Park, Osoyoos, Kootenays, etc), or at either end (Metro Vancouver, Whistler, Banff or Calgary). It is a large, rural area with a significant number of activities, attractions and communities along it's route, which can be a positive for some travellers (e.g., lots of places to stop, unique towns to visit, etc), or a detractor (slower route, rural environment may not provide amenities, etc). As a planning area, Highway 3 benefits greatly from the existence of the Highway 3 Mayors and Chairs Coalition and their Tourism Sub-Committee, who have already worked collaboratively with the Provincial Government to improve the experience along the route, predominantly a better driving experience through improved signage, additional passing lanes, and safer roads/pedestrian walkways. Significant investments have been made to improve the road conditions. Having this group already established and working collaborively on priority initatives sets a great foundation for moving forward. There are currently multiple iconic demand generators (such as Manning Parks, ski resorts, summer destinations) and an abundance of additional experiences with potential to further increase the visitor interest for travelling along Highway 3. However, areas of predominanly summer season destinations (e.g., Osoyoos, Princeton, etc) have large gaps in it's total offering to visitors. Areas with strong winter product (e.g., Fernie, Rossland, Kimberly, Manning Park, etc) have more significant capacity opportunities in the shoulder season (spring/fall). Overall, the corridor lacks a strong, iconic destination (e.g., Sea-to-Sky Gondola, Whistler), however it's appeal is the totality of experiences all along the route like a "string of pearls" that when combined in a 'journey' offer inspiration to travel that route over other options such as the faster, but less scenic Highway 5 (Coquihalla Highway). In many ways, communities along the highway have taken great steps to improve the climate of the tourism industry and visitor economy. But the level of visitation doesn't reach significant volumes to achieve year-round business sustainability and enable all communities and destinations along the corridor to fully benefit from its potential. Constraints that limit the corridor include: road conditions and rest stops; consistent cell/internet service; business operating climate; lack of new products experiences, attractions and year-round activities; and staffing constraints. Similarly, there are multiple risks associated with future tourism development, such as: trail and land use management; climate change; funding sources such as RMI; and inadequate base of year-round visitation to support business viability.

Destination Readiness	
General Attributes	• Entire destination includes unique attributes which potentially appeal to and cater to slightly different markets. • The natural environment and diversity of ecosystems has significant appeal. • There are areas along the corridor (e.g., communities, rest areas, along the side of the highway) that may be considered visibly unattractive. • For the most part, the built environment (cities, towns and villages) has aesthetic appeal to visitors. However, some areas may detract from the appeal, e.g., empty storefronts, empty lots, industry, etc. • Local communities have put effort into improving the attractiveness of public areas through landscaping, floral décor, and/or other forms of artistic outdoor enhancement such as art installations and murals, however, more can be done. • There is a low incidence of crimes. • Visitor considerations for the most part have not been considered as part of the planning in Emergency Preparedness.
Travel to the Destination	• The areas are almost entirely reliant on visitors having a vehicle to get them to and around the destination. • The destination is accessed by relatively good roads for driving. Some parts of Highway 3 are windy and can be considered more dangerous in poor weather. Many roads are not lit in the dark. • There is a regular scheduled air service to local and regional airports along the planning area. Airplane service is generally considered reliable, good quality service; Castlegar is the exception, with less reliable service and higher than average cancellation rate due to weather. • Overall, the airports along the route provide generally good airport infrastructure. • The destination corridor is served by a regular scheduled bus service from other major cities outside of the area, however, service is provided in the middle of night in some areas, which is not a good experience or conducive to connections with other services such as rental cars or accommodations. • Winter travel to the destination can be readily undertaken, but perceptions of poor road conditions can detract visitors or curtail visitor travel plans. • Travel by vehicle is generally supported by adequate support services, e.g., gas stations, roadside emergency services, signage/directions, etc. There are few rest areas; the appeal of the destination could be improved with additional view stops. Also, there are gaps in the services 24-hours for late night travellers.
Transportation and Access within the Destination	• There is very little transportation available to travel between communities and major points of interest, other than the travellers own vehicle. • Highway signage could be improved to clearly guide visitors to services, amenities and attractions access. The highway system could benefit from more rest areas and view stops for the travelling visitor. These rest areas could be enhanced with wifi service and some basic amenities such as coffee/snacks.

Tourism Assets and Experiences	
Natural Resource-Based Tourism Assets and Experiences	• The destination has significant natural attractions and designated landscapes (regional parks, provincial parks) that draw visitors to the area. Some of these natural attractions and designated landscapes are serviced by tourism operators, but opportunities exist to improve visitor access for visitors of all skills levels and abilities. • Freshwater-based recreational activities are available and attract visitors to the area (boating, swimming). • Angling opportunities (fresh water) are available and attract visitors to the area. • Guide outfitter opportunities are available and attract visitors to the area. • The natural landscape (scenic and biodiversity) is well protected in many areas and is generally managed for balanced use. There are few land use management plans. • Generally, visitors are made aware of the destination's natural heritage values, including signage and information on key attractors, although more can be done to heighten awareness along the corridor. • There appears to be an increase of people accessing trails/back-country trails with little knowledge of risks and skills needed, e.g., safety, survival skills. • Winter outdoor recreation is abundant and draws significant visitation to the area. The Powder Highway has increased in awareness over the last five years and is a core attractor. • Nature-based tourism assets have been improved to provide access to visitors with disabilities, however more can be done. • Tourism use levels are not generally adversely affecting natural assets or the visitor experience. • The destination has an attractive range of trail systems that draw visitors to the area for hiking, mountain biking, canoeing and kayaking. • There are trails available for off-road vehicles and horseback riding. • The trails are well managed but the volunteer base is at capacity. Trail infrastructure and supportive amenities such as huts have been developed. Access to trail heads for the area's top trails is good and parking is adequate. • While there are issues associated with conflict between users or with other economic activities on the trail systems (in particular with motorized and non-motorized users), they are being managed within the communities and with help from the Provincial Government. • Connectivity between trails within the region and beyond the region are being made, but more work can be done to make them market-ready. Gaps in the trail networks have been fully identified in some communities and strategies are in place to address these gaps. • Rail Trails development presents an important opportunity for the Corridor. • The stories associated with the trails across the destination have not been fully identified and documented. • Trail experiences have not been developed and integrated with other adjacent attractions and complementary experiences to their potential.

	• The destination does have marina facilities on some lakes with the ability to accommodate visiting boats traffic, although there are gaps in water-based infrastructure (pumpouts, fuel, moorage).
Cultural Heritage	• The destination has few Aboriginal cultural tourism attractions that draw visitors to the area although there are some available that may be included in a visit, e.g., Nk'Mip Desert Cultural Centre, St. Eugene's Resort. • The destination has a good selection of cultural and heritage attractions that draw visitors to the area (e.g. historic buildings, historic sites, etc). • The contribution of BC's historic places is evident within the destination, including three Japanese Canadian Internment Camps. • Local government has a strong commitment to protecting and enhancing cultural and heritage assets as tourism products. • The destination has a strong arts community and a relatively good culture performance sector based on the size of communities. • Many agritourism and opportunities to experience rural lifestyles are available. • Visiting wineries and craft breweries is a growing product offering, with new operators every year. • Farmers' markets are available in spring to fall as well as several seasonal fruit stands along the route • The destination has been building a reputation for local foods and culinary tourism, in particular in the Okanagan and Kootenay areas. • The destination has built a reputation for artisan arts and crafts products.
Other tourism attractions and supporting infrastructure and services	• There is a lack of fun-themed attractions that are widely appealing and accessible to all and that draw visitors to the area. • The destination has spa and wellness centres, with additional independent spa/wellness services. • The evening economy is not strong (evening entertainment) in most smaller communities. • Dining opportunities at a range of price points are readily available in the peak summer season and more limited through the rest of the year. Many businesses close in evenings or specific days, which leaves limited options. • The retail shopping experience is a key aspect of the overall visitor experience with efforts to drive further vibrancy in downtown cores. • The visitor is well serviced by visitor services such as multiple visitor centres, street teams, and social media efforts.
Delivery of experiences	• Along the entire 10-hour drive along the corridor, there are gaps in experiences, e.g., a traveller can drive for an hour without an enticing experience or attractions to pull them off the road. • There are more limited visitor experiences in spring and fall. • Not all operators regularly partner to develop and deliver engaging and innovative experiences. • The visitor can develop some understanding of the destination's key stories from the experiences that are offered. Visitors can select from a range of developed

	experiences that enable them to understand the essence of what makes the destination distinctive. • The destination stages a spectrum of cultural heritage/ nature events/festivals that attract overnight visitors. • The destination promotes itself as part of larger driving routes or circle tours that are designed to enrich the visitor experience. However, itineraries have not been developed inclusive of the entire Highway 3 corridor; rather sections are included in other routes, e.g., Kootenay Hot Springs tours or Route 97, which is a north-south route through the Interior Cascades of British Columbia and North Central Washington. • For the most part, through direct engagement with businesses, visitors can easily purchase/book experiences and activities in advance. • There are some outfitting businesses that can assist visitors experience the nature-based and/or water-based assets more effectively. • There are few tour guides that offer visitors a more personalized experience. • The destination offers integrated resort experiences of varying qualities. • There is limited gear rental in some communities thereby necessitating the traveller bring their own equipment.
Sporting activities, venues and facilities, including winter sports	• There are some indoor sporting facilities (e.g. arena, aquatic centre) that are used by visitors and sport tourism hosting. • There are many 18-hole golf courses that are used by visitors. • There are outdoor sporting facilities (e.g. playing fields) that are regularly used by visitors, in particular for sporting events. • Some parts of the destination regularly hold sporting competitions/ events that attract overnight competitors and spectators. • There is an abundance of winter tourism facilities (community ski hills, destination ski resorts, lifts etc.) throughout the route, most concentrated in the Kootenays.

Support Services Infrastructure	
Accommodation and related facilities	• The destination offers a variety of fixed-roof accommodation facilities of various quality, price and offerings. • Some existing hotels/motels may benefit from updating. • Some areas along Highway 3 have significant cottage country visitation, with accommodation augmented by second home ownership and vacation rentals. In particular, the East Kootenays experience ownership by the Alberta market. • Additional public camping facilities (provided by the Province) would be beneficial for the peak season, as would increasing the season length. • The destination has adequate commercial (privately owned) camping facilities, although some areas could benefit from an increase in capacity as well as an increase in more unique forms of accommodation (e.g. glamping in a miners tent, treehouses etc.).

Meeting, conference and other supportive facilities	• The destination has many quality designated meeting and conference facilities that provide full service (turn-key) event assistance. • Tourism facilities and venues have been improved to provide access to visitors with disabilities. • In general, improvements have been made in the cell coverage and internet connectivity, although there are still many gaps along the main highway and in communities.

Enabling Context	
Planning and policy	• As a planning area, Highway 3 benefits greatly from the existence of the Highway 3 Mayors and Chairs Coalition and their Tourism Sub-Committee, who have already worked collaboratively with the Provincial Government to improve the experience along the route. Other than this committee, there is no other organization looking at the entire length of the Highway 3 corridor for tourism planning and policy work. • Local governments are generally reactive to the development of tourism through economic incentives or investment attraction strategies, as opposed to taking a proactive approach. However, there seems to be growing political support for the tourism industry. • There are many destination management organizations (DMOs) that proactively advocate for tourism, market their destinations, and work to enhance the overall visitor experience. However, there are some gaps and communities that do not have their own DMO and consequently are more challenged to 'connect' into opportunities. • Land-use planning is playing a more significant role in the development of tourism, with considerable uncertainty still evident. • Agricultural Area Plans support development of agritourism within the limitation of Agricultural Land Reserve restrictions. • Regional Growth Strategies support the strategic development of tourism. • There is mixed support for the tourism industry from the communities along the corridor, as other industries, general population growth, environmental concerns, and residents' way of life are considered. • Local governments are supported through input and dialogue with tourism advisory committees or boards. • A variety of Provincial Government ministries and agencies operate within the planning area and have varying degrees of knowledge of the destination. Some areas are more actively involved in tourism development, such as Transportation, Rec Sites & Trails, BC Parks and the Economic Development division within the Ministry of Jobs, Tourism and Skills Training. • The management plans for designated landscapes that benefit tourism (e.g. Provincial Parks) are not current and do not seek to optimize the relevant assets.
Tourism human resources	• Many local residents need to leave their communities to access post-secondary educational and training programs that offer tourism related programs.

	• WorldHost® programs, and other front line customer services training, are periodically hosted within the destination. • Some efforts are taken to ensure that frontline staff are highly knowledgeable of the local area and can provide accurate information and helpful suggestions to visitors that provide economic benefit. However, many staff would benefit from greater familiarization with their own destination and others along Highway #3. • Succession planning appears to be a moderate issue among tourism businesses and operators, in particular for festivals and events, arts and culture, and trails. • The destination is adversely impacted by human resource recruitment and retention issues as staffing shortages are evident in peak seasons. Some operators leverage work programs such as temporary foreign workers. • Staff retention issues are exacerbated by lack of year-round employment opportunities. • Economic development and tourism organizations have some working knowledge of relevant labour policies, but not robust. • Many arts, cultural, festivals and events have a reliance on volunteers to execute their programs and events. • Most volunteer run organizations are experiencing a degree of 'burnout'. • For some, there is a negative perception of tourism as a career path.
Financial resources and regulations	• The destination has received suitable private capital investment in tourism within the past three years. • The destination has accessed capital grants that benefit tourism within the past 3 years. • Economic development organizations and staff generally have varying degrees of knowledge on the status of the industry and opportunities for investment. • Banks and lending institutions do not seem to be as supportive of loan applications from the tourism industry as other industries. • The industry has been impacted by rising land values, as some waterfront land suitable for tourism development has reverted to housing developments. • The Municipal and Regional District Tax is in place throughout many communities within the destination.
Sustainability	• There is clear evidence of a strong commitment to the principles of environmental sustainability by the tourism industry and community at large. • There are some policies and procedures in place to maintain high quality, water-based recreation areas, but other places lack regulations. • In general, tourism does not seem to negatively affect quality of life for residents, although peak weekends and specific areas raise acute concerns. In the East Kootenays the resident's way of life can be more significantly impacted by larger influx of visitors from Alberta. Also, the four resort municipalities can see a dramatic impact on their local quality of life as visitors can represent a significant increase in population base, with a relatively small tax base to support the infrastructure required for the visitor economy. • There is an emphasis on developing tourism in a way that maximizes local economic and social benefits.

	• Tourism is playing a positive role in assisting rural communities to transition from dependency on traditional sectors of the economy such as forestry. • In general, local residents and businesses have varying degrees of knowledge and understanding of the importance of tourism. • Tourism providers are generally encouraged to work toward certification or adopt relevant 'best practices'. • Visitor surveys on satisfaction have been conducted periodically throughout the planning area, but not based on a consolidated effort to gain insights on visitors for the entire Highway 3 corridor. • Very limited research and information, specific to Highway 3, is available to be knowledgeable and make informed decisions.

7.3 Key Comparables/Examples

Three case studies were developed with the intent to showcase comparable destinations that have focused on innovative tourism growth and may provide learnings appropriate for the Highway 3 planning area.

7.3.1 Okanagan Rail Trail

The Okanagan Rail Trail is an example of:

- A full strategic planning, destination development process, including all stakeholders in the area.
- Alignment of strategy from the provincial level, to a regional level, to a sub-regional level, to the individual tourism business level - all plans are aligned in developing and marketing trails.
- Creating a new and/or enhanced experience to attract visitors, and provide something unique in marketing initiatives.

Over history people of all ages have been fascinated with the Railway. It is therefore not surprising that there is a sense of melancholy as train routes over time have been replaced by other less costly and more efficient modes of transportation.

Today in many locations, and specifically along the Trans Canada Trail in southern BC, these former rail lines have been and are being reinvented through the Rails to Trails initiatives. Hundreds of miles of rail line reborn as trails for outdoor enthusiasts. Fortunately, the rail lines for the most part were built with less than a 3% grade in order for the trains of the day to be able to navigate the routes thus providing trails that are quite accessible for many ages and abilities. These trails not only provide communities with healthy outdoor recreational options but create the strong potential for increased domestic and international tourism visitors.

In BC, there is a Provincial Trails strategy that was created by the Recreation Sites and Trails department in the Ministry of Forests, Lands and Natural Resource Operations. The strategy was developed in a spirit of partnership. It is a collaboration of provincial agencies, recreation organizations, local governments, land users, First Nations, and others across BC. The vision of the strategy is "a 'world-renowned', sustainable network of trails, with opportunities for all, which provides benefits for trails users, communities and the province".

The Thompson Okanagan Tourism Association, in their 10-year tourism strategy for the region, identified trails as an experience-based theme to strengthen their identity as a destination. They have embarked on the process of developing a specific Tourism Trails Strategy for their entire region.

The aspiration is that from the provincial level, to a regional level, to a sub-regional level, to the individual tourism business level, all plans are aligned in developing and marketing trails.

To that end, TOTA with the support of Destination BC brought together hundreds of industry stakeholders and community leaders over the course of 2015 and 2016 to complete a Rail Trail Tourism Strategy that will assist in ensuring these Rail Trails are not only established, but that there is a plan in place for their longer-term development and ongoing maintenance allowing for future generations to enjoy the trails as well as the stories and history of these great routes. Efforts to date to enhance the trail system included:

- Myra Canyon section of the railway was designated a National Historic Site of Canada in 2002.
- Safety improvements including clearing and rock face stabilization along the line have taken place.
- A formalized agreement was put in place in 2014 to clearly articulate the non-motorized parts of the trail.
- The Province constructed a parking area, turnaround signs and an accessible trail to a popular tunnel.
- Businesses along these former rail corridors are developing or redeveloping themselves to provide services to the growing number of visitors to these trails.
- Destination BC and TOTA also worked closely on bringing the Remarkable Experiences Business Development pilot to the Kettle Valley. The program brought together 10 operators of various sizes and types from Christina Lake to Summerland that all play a role in the Kettle Valley Rail Trail experience. Through workshops and training these business operators saw the potential for their products and services, explored opportunities to create new remarkable experiences for visitors, expanded their reach online, and realized that they were better and stronger working together as collaborators than as competitors.

7.3.2 Gold Rush Trail

The Gold Rush Trail is an example of destination development in a planning area that spans three tourism regions along a historical route. It is also an example of:

- Long term commitment to destination development and promotion with extensive stakeholder engagement over multiple projects and years.
- Multiple tourism regions collaborating on a mutual goal.
- Focusing on enhancing current and historical assets within a destination to revitalize visitor appeal.

Stretching from New Westminster in Vancouver, Coast & Mountains region, through the Thompson Okanagan Region's Cache Creek and the Cariboo Chilcotin Coast Region's Clinton to Barkerville, the Gold Rush Trail (GRT) has been a hefty nugget of BC culture since the mid-1800s. Thousands of gold seekers made the journey up the trail towards gold towns like Barkerville with a dream to strike it rich.

Between then and the 1980's, modern-day "prospectors" still travelled the trail, but not in search of a fortune in gold. Instead, these travellers drove through the Fraser Canyon to reach Central and Northern BC, and were treated to a wealth of experiences such as the Hell's Gate Airtram, historic sites and wagon roads, First Nations cultural destinations, and more. However, in 1987, the Coquihalla Highway opened and travel to and through the Fraser Canyon along the GRT began to decline, along with other economic generators. Multiple projects to revitalize the economy were "boom and bust", dependent on government priorities and investments.

In the fall of 2010, the Cariboo Chilcotin Coast Tourism Association (CCCTA) and New Pathways to Gold (NPTG) held a special meeting with destination stakeholders with the goal of revitalizing the GRT, focusing on the destination's marketing and tourism efforts. First, it was critical to determine if there was sufficient interest and agreement on a focus of sustainability before any work began. This first meeting resulted in commitments to develop a long - term strategy to grow tourism revenues and visitation along the trail.

With support from the stakeholders, the group sourced funding to create the strategic plan. Between 2010 and 2012, the CCCTA led a collaborative planning effort resulting in the development of a Corridor Management Plan. The CCCTA worked in partnership with Vancouver, Coast & Mountains Tourism Region, Thompson Okanagan Tourism Association, the Heritage Tourism Alliance, the Aboriginal Tourism Association of British Columbia, New Pathways to Gold, and Destination BC (known at the time as Tourism BC within the Ministry of Jobs, Tourism and Skills Training).

The plan was completed in 2012, and the three tourism regions signed a memorandum of understanding to make it happen. The planning project included extensive outreach to stakeholders along the route and a Management Committee of these stakeholders was established in November 2012 to implement the recommendations outlined in the plan. Four objectives were identified:

1. Grow awareness of market ready experiences and theme based journeys along the Gold Rush Trail.
2. Grow visitation and revenues to market ready experiences along the Gold Rush Trail.
3. Improve visitor experience along the Gold Rush Trail.
4. Enhance the scope/scale of the journey available to visitors.

The plan looked at: compelling journeys and themes that would unite the corridor; target markets and marketing strategies; partnerships and relationships to be built; improvements to existing experiences (e.g., snowmobile trail); infrastructure improvements needing government investment (e.g., highway maintenance, highway pullouts, signage, rail service, cell coverage, etc), and eventually, connections to a larger experience that includes California to Alaska connections. The plan also identified a governance structure and a sustainable funding model.

Raising awareness of the trail in the cluttered modern tourism space was identified as essential. Introducing new digital channels and revitalizing old ones were paramount to the destination's success. In close alignment with this, the committee also identified branding and logo design as top priorities to maximize the success of any marketing efforts.

With the plan finalized in 2012, the group set out to identify and create a unifying brand, starting with conducting research, including a 2013 summary of existing information sources, and a brand awareness study conducted in key markets of Alberta, BC and the UK. By 2015, a new brand platform was created based on consumer insight and aligned to the BC destination brand.

With the hiring of a project manager, the marketing plan began with the creation of new marketing and tourism infrastructure, including a website, brochure, and newsletter. Then, in 2014, a Facebook page was launched and a Comcast campaign was undertaken, including an online 30-second advertisement and five-minute feature video with very high view rates.

A significant development initiative was a partnership with the Royal BC Museum, which eventually opened a gold exhibit in 2015. 2015 also brought a fresh online presence with an Instagram account and an updated website based on the approved brand. Other initiatives included 2015 Canada Winter Games on-site activation, ad space in the annual Van Dop listing of cultural events in B.C. and successful familiarization tours for travel-trade and media representatives.

In parallel, work continued in the area to enhance the heritage tourism offerings and continued reconciliation with First Nations.

One initiative of note in 2015, led by the CCCTA and jointly funded by the Provincial Heritage branch and Destination BC, involved holding free Explorer Quotient (EQ) training through stakeholder workshops intended to “help tourism businesses, heritage tourism operators and communities identify visitor types and expectations, learn how to create memorable visitor experiences and work cooperatively to leverage opportunities”. The workshops introduced the EQ program to help stakeholders with improving their experiences and marketing. The training also continued to create unity amongst the Gold Rush Trail stakeholders.

The Gold Rush Trail Committee continues to secure funding to sustain the development and marketing of the Gold Rush Trail and hopes to expand the trail, eventually linking it with San Francisco and Alaska.

7.3.3 Alaska Highway Heritage Project

The Alaska Highway Heritage Project is an example of:

- Long-term strategic planning and destination development involving all stakeholders in the area and intersecting with multiple planning projects.
- Working together to develop and enhance BC's current and future tourism assets.
- Uniting a broad, diverse coalition that includes stakeholders from numerous First Nations, all communities in the Alaska Highway Corridor, and the governments of BC and Yukon.
- Building a plan that incorporates creative ways to incentivize stakeholders to act on that plan.

The 1,900-km long Alaska Highway has a vast canon of legacy, from its Indigenous landscapes through the fur-trade period, the Gold Rush, signing of Treaty 8, Peace River settlement, construction in the Second World War, improvements for tourism and its modern-day use as a vital international transportation route and travel destination. But above all this, it is known as a sustaining link between our heritage and the natural world. Stretching from Dawson Creek, BC through Whitehorse, Yukon to Delta Junction, Alaska, it connects Canadians with their US neighbours and serves as one of the most significant symbiotic links between the two nations.

British Columbia is internationally known for its driving routes, and they are a significant tourism driver that benefits many stakeholders. For local residents, the Alaska Highway is the region’s main street. It connects them to each other, to the places where they work and live, and to history, culture and nature. Many residents recognize historic structures, archaeological sites, and spiritual places, but most visitors are focused on the scenery's beauty and surprised by the level of industrial activity all the way north to Fort Nelson. Residents and visitors alike enjoy wildlife viewing and outdoor recreation.

In an ongoing effort to honour this legacy, Alaska Highway Heritage Project (led by the Alaska Highway Community Society) created a three-year plan with the intent to seek formal recognition of the Alaska Highway as a National Historic Site of Canada. Within this overarching vision, the organization sought to:

- Create a common language among partners and across jurisdictions (including Yukon, BC, local governments, and First Nations).
- Coalesce the stakeholders in a respected national brand.
- Build an understood link between the highway's cultural and natural heritage.
- Gain access to Parks Canada expertise and experience.Get visitors to stay longer and to increase spending by improving destination.

The Alaska Highway Corridor is not a single place or single experience. It is an extended network of culturally significant elements that must be experienced or interpreted to be seen and understood. Team member Julie Harris aptly states, "We understand that heritage includes landscapes and places that may never have been changed by human hand, but still have value to us because they are part of our identity."

While the Alaska Highway Corridor is a shared space (province, territory, federal, municipal and First Nations), governments want to keep their own investments within their own boundaries (with the caveat of the Peace River Regional District's project funding discussion below) and ensure that their own policies (including corporate identity) are always applied. Rules on everything from what signs must look like to whether representatives can attend meetings vary from jurisdiction to jurisdiction. In spite of this, however, they unanimously agree that the Corridor is an historic place that is part of Canada's identity and valuable for economic diversification through tourism.

Perhaps the greatest example of collaboration tackled the jurisdictional issues head on. Substantial progress was made when Yukon created a sister group to the BC-based Alaska Highway Community Society called the Alaska Highway Heritage Society, which used a different funding model. A Memorandum of Understanding was signed in October 2014 by the organizations to formalize their joint participation in the Alaska Highway Heritage Project. Also, the Peace River Regional District (in BC) has committed over $600,000 to this model, and enables Alaska Highway Community Society to go into the Yukon if that's where the money is best spent. This collaboration is paramount to the initiative's success. "Political will is such a big part of the process," April Moi, the local champion, emphasizes. "And it needs to be rejuvenated after each election."

The Alaska Highway Heritage Project team worked with communities to identify specific places within the corridor that have potential to be of national historic significance. In BC, the places are:

- Historic Kiskatinaw Bridge
- Charlie Lake Cave (Tse'K'wa), Fort St. John
- Liard River Hot Springs

Further, according to their website[43], the Alaska Highway Community Society, working collaboratively with other organizations, is undertaking the development of a Northeast BC Heritage Strategy. The strategy “will set out a roadmap to create a viable future for community heritage in northeastern British Columbia”. The project will build upon work undertaken for the nomination of the Alaska Highway Corridor and related initiatives such as the Tumbler Ridge Global Geopark (TRGG), Treaty 8 projects, trails and Destination BC’s destination development and marketing programs.

It has taken years to get to this point, and there is still significant work left to be done. This is truly a long-term destination development project. Commemoration of a network of National Historic sites will strengthen a platform for telling the story of the Alaska Highway Corridor. In the meantime, the communities are moving ahead with their plans to recognize the Alaska Highway. One example is the plans for the 75th Anniversary of the highway in 2017; the following projects are underway: Alaska Highway 75th Anniversary website, Alaska Highway theme song, museum auto circle tour map, public art project, travelling roadshow performances, and a storytelling project.

8 SWOT/Destination Potential Analysis

Strengths

- Highway #3 Mayors and Council Coalition and Tourism Sub-Committee established and actively working collaboratively to enhance the corridor. A strong, unified voice with the Provincial Government.
- Abundance of Provincial Parks and outdoor recreation activities.
- Growth in agritourism, including the different farmer’s markets, fruit stands, wineries, breweries.
- Strong artisan culture – increasing recognition of the area for its arts and culture.
- Significant strengths in nature-based tourism including consistently deep powder snow in winter, extensive trail networks with epic mountain bike rides, hikes and runs and wealth of water-based experiences on the many lakes and rivers.
- Committed and active group of volunteers working on festivals, event, arts and trail development.
- Variety of supporting economic development and funding organizations.
- Unique, family-oriented communities that offer authentic glimpses into rural life.
- Strong product amenities – golf, ski facilities, world-class fishing.
- Four-season playground, with strong summer and winter destinations.
- Strong base of funding and economic development organizations.
- Presence of two densely populated areas at each end: Lower Mainland in the West and Southern Alberta in the East.

[43] http://ouralaskahighway.com/?page_id=981

Weaknesses

- Frontline service levels and quality of experience at tourism businesses are not market ready in many establishments, e.g., quality of some hotel accommodation and service levels of smaller businesses could be improved.
- Dependency on the peak summer season or winter season for some communities, with severe decline of visitation in the off-season.
- Transportation barriers to, from and within the destination, and perceptions of road safety.
- Trail system connectivity.
- Availability of affordable accommodation for staff and entrepreneurs.
- Nature-based assets that offer potential new experiences, but require operators to facilitate such.
- Lack of soft tourism experiences in some areas, e.g., wildlife viewing, bird watching, gentle walks, etc.
- Volunteer issues include aging, burnout and lack of succession planning.
- Staff constraints, including skillsets, transportation, housing and year-round sustainability.
- Varying degrees of knowledge on the tourism industry from economic development and government staff.
- Lack of sufficient information, knowledge and data to demonstrate industry value ad support business decisions.
- Relatively poor perception of tourism as important economic driver and career path.
- Lack of certainty for land use for tourism businesses and experiences.
- Lack of resources to support maintenance and upkeep of existing nature-base assets, e.g., trails, parks.
- Cell service, wifi and internet connectivity.
- Not enough critical mass to create a viable, year-round destination.

Opportunities

- Arts, culture and heritage tourism, including the many festivals and events.
- Interest in agritourism, culinary tourism, wineries, cideries, and breweries is increasing.
- Aboriginal Cultural Tourism development.
- Electric vehicle connectivity as a manifestation of commitment to innovation.
- Significant investments in cycling trails-based tourism.
- Marketing generated by sector marketing organizations and co-operative partnerships, including BC Ale Trail, Mountain Biking, and BC Camping and RVing Coalition.
- Destination BC programs, i.e., Remarkable Experiences, Visitor Services social media program.
- Lower Canadian dollar makes BC attractive to US market and for staycations.
- Group meeting infrastructure in some areas, e.g., convention centre.
- Educational tourism.

Threats

- Climate change, in particular for winter resorts areas.
- Value of Canadian dollar.
- Rules and restrictions that hinder or delay development – all levels of government.

- Appeal of the Highway 1 or Highway 5 routes from Vancouver to Alberta, particularly for touring market.
- Available workforce.
- Growth of competitive destinations, e.g., Sea to Sky, Vancouver Island.
- Sharing economy. Airbnb rentals do not collect MRDT.
- Dependency on the Alberta market, and current economic recession (projected to improve in 2017).
- Residents may not fully understand how tourism benefits the community.
- Resident resistance to change.
- Changing demographics may shift demand for certain travel experiences.
- Lack of tourism staff and hindering labour laws, e.g., foreign workers.
- Industrial development detracting from tourism values and potential, e.g., logging, mining.
- Wildlife degradation and population declines.

8.1 Summary of Relevant Constraints & Opportunities – after meeting from survey

The following constraints and opportunities were identified by stakeholder interviews and by participants of the Session 1 workshops. These were then sent to a broader stakeholder group through a survey for validation and prioritization (online survey to 847 stakeholders, January 16 to February 3). The 183 respondents[44] were asked how important it is to address the identified constraints and opportunities with ratings from 1 to 5, with 1 being "not important" and 5 being "absolutely critical".

The top 15 identified constraints and opportunities are noted below.

Top 15 identified barriers:

1. Long-term health of the ecosystems/natural assets. (4.20)
2. Long-term retention of community character/personality. (4.04)
3. Lack of sustainable funding stream for trail maintenance. (4.03)
4. Lack of coordination and collaboration between stakeholders. (4.03)
5. Road conditions during winter months. (3.95)
6. Lack of cell service and internet connectivity. (3.90)
7. Motorized vs non-motorized land use conflicts. (3.90)
8. Continuation of the Resort Municipality Initiative (RMI) funding. (3.88)
9. Lack of information to support value of tourism. (3.84)
10. Inadequate base of visitation to support business viability. (3.82)
11. Lack of community support for tourism industry/new and expanding tourism businesses (3.82)
12. Lack of education on the value of tourism (3.81)
13. Quality (safety, amenities) of rest stops and washrooms. (3.77)
14. Lack of integrated and consistent wayfinding – Apps to Maps to Signage. (3.77)
15. Over-reliance on non-profit/volunteer user groups i.e. volunteer burnout. (3.76)

[44] Responses by tourism region: Thompson Okanagan – 464 invites, 62 completed responses; Kootenay Rockies – 337 invites, 88 completed responses; Vancouver, Coast and Mountains - 37 invites, 14 completed responses.

Top 15 identified opportunities:

1. Strong focus on shoulder season visitation to ensure year-round business viability. (4.1)
2. Beautification of entire route, e.g., ensure well kept amenities. (4.07)
3. Improve vibrancy of downtown centres. (4.04)
4. Coordinate schedule of festivals and events. (4.03)
5. Improve understanding of the value of tourism and community support for tourism. (4.02)
6. Improve customer service skills levels. (4.01)
7. Grow new/existing festivals and events. (4.00)
8. Secure more consistent support for tourism from municipal governments. (3.96)
9. Increase efforts to attract new investment. (3.96)
10. Policy for maintaining scenic quality of highway viewscapes. (3.92)
11. Improve/develop iconic hiking trails. (3.91)
12. Improve wayfinding signage (Apps to Maps to Signage consistency). (3.89)
13. Offer free wi-fi at regular intervals. (3.87)
14. Improve highway shoulder for cycling. (3.87)
15. Facilitate businesses working together to package products together. (3.86)

The full list of identified constraints and opportunities is included in Appendix 9.8.

9 APPENDICES

9.1 Plan Informed by Reports

The following reports are included in the review, as well as a significant amount of online information reviewed via websites:

1. District of Hope Integrated Official Community Plan, June 2016
2. Hope BC Economic Development Strategy Update, October 2015
3. Hope BC Economic Profile, 2014
4. Fraser Valley Regional District Strategic Plan 2014-2018, 2014
5. Regional District of East Kootenay Regional Sustainability Strategy (RSS), 2014
6. Sparwood - Community Sustainability Plan, 2009
7. Highway 3 Corridor Economic Impact Study, 2011
8. Highway 3 Corridor Economic Impact Study Final Report, June 2012
9. Elk Valley Regional Economic Opportunity Analysis & Growth Sector Identification, June 2013
10. Columbia Basin Business Retention and Expansion Project, 2015
11. Sparwood – Parks, Recreation and Culture Master Plan, 1999
12. The District of Sparwood Communications Strategy, 2013
13. District of Sparwood – Community Engagement Strategy, 2012
14. District of Sparwood – Community Engagement Strategy, Next Steps 2013
15. Sparwood 2015–2018 Corporate Strategic Plan, 2015
16. Sparwood Community Profile 2016, April 2016
17. District of Sparwood Official Community Plan, 2015
18. Greenwood Official Community Plan, 1996
19. Grand Forks Community Profile, 2013
20. Grand Forks Economic Profile, 2014
21. Community Futures Kootenay Columbia Boundary report 2015/2016
22. Castlegar Official Community Plan, 2011
23. Cranbrook Cultural Plan for Arts and Heritage, 2009
24. The Cranbrook Arts, Heritage and Cultural Scan, 2008
25. Cranbrook Official Community Plan, 2014[45]
26. Kootenay Rockies In Market Regional Report, 2012
27. Destination BC Value of Tourism 2003-2013, Feb 2015
28. Tourism Fernie Annual Report 2015-16
29. Tourism Fernie Winter Survey Results, 2015
30. Tourism Fernie Summer Survey results, 2014
31. Fernie MRDT Five Year Strategic Business Plan, 2016
32. Fernie Official Community Plan, 2014
33. Fernie Integrated Community Sustainability Plan, 2011

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[45] https://cranbrook.civicweb.net/filepro/documents/567 (each chapter is saved as a separate file)

34. Fernie Livability Report, 2014
35. Fernie 2014-2018 Corporate Strategic Plan
36. Fernie 2013 RMI Annual Report
37. Fernie 2014 RMI Annual Report
38. Fernie 2015-2017 Resort Development Strategy
39. Fernie Trails Master Plan, 2015
40. Princeton Official Community Plan, 2008
41. Princeton Annual Report, 2014
42. Princeton Community Traffic Study, Final Report, 2015
43. Okanagan Valley Regional Profile
44. South Okanagan Regional Growth Strategy (RGS), 2016
45. Regional District Okanagan Similkameen Regional Heritage Strategic Plan, 2016
46. Regional District Okanagan Similkameen Trails Master Plan, 2012
47. Regional District Okanagan-Similkameen Agriculture Plan, 2011
48. Strategy for a Sustainable Similkameen Valley 2011-2020, 2010
49. Osoyoos Integrated Community Sustainability Plan, 2011
50. Town of Osoyoos 2O16 - 2019 Business Plan, 2016
51. Town of Osoyoos 2016 Operating and 5 Year Capital Project Plan, 2016
52. Osoyoos Parks and Trails Master Plan presentation, 2016
53. Osoyoos Parks and Trails Master Plan report, 2016
54. Osoyoos Resort Development Strategy, 2015-2017
55. Osoyoos RMI Annual Report, 2015
56. Osoyoos RMI Annual Report, 2014
57. Creston, Community Profile, 2013
58. Creston Official Community Plan, 2016
59. Cultivating Creston Integrated Community Sustainability Plan, 2013
60. Cultivating Creston and Age-friendly Action Plans (Round 2) Report, 2014
61. Town of Creston 2015-2017 Corporate Strategic Plan, 2016
62. Plan to improve the visual appeal of Downtown Keremeos, 2016
63. Keremeos Age-Friendly Action Plan, 2015
64. Keremeos, Cawston and Similkameen Experiences Map, 2016
65. Midway Official Community Plan, 2007
66. Village of Salmo 2015 – 2019 Strategic Plan, updated 2016
67. Village of Salmo Administrators report, 2016
68. Sustainable Salmo presentation, Sept 2016
69. Salmo Age-Friendly Action Plan, 2016
70. Fraser Basin 2016-2021 Strategic Plan
71. Fraser Basin – Rural communities Case Studies
72. Regional District Central Kootenays Recreation & Culture Master Plan, 2016
73. Regional District Central Kootenays Agricultural Plan, 2011
74. Regional District East Kootenays Agricultural Plan
75. Nelson Strategic Plan, 2015-2018
76. Nelson Sustainability Strategy

77. Nelson OCP
78. Trail OCP, 2010
79. Trail Strategic Priorities, 2015
80. Rossland Museum Discovery Centre Report, 2014
81. Rossland, Regional District of Kootenay Boundary Heritage feasibility study, 2010
82. Rossland Corporate Strategic Plan 2016-2018
83. Rossland RMI Annual Report, 2014
84. Rossland RMI Annual Report, 2015
85. Rossland Resort Development Strategy, 2015-2017
86. Kimberley Revised Tourism Plan, 2010
87. ImagineKimberley ICSP Document, 2011
88. Kimberley Cultural Plan, 2009
89. Kimberley OCP, 2016
90. Kimberley RMI Analysis, 2006-2015
91. Oliver Strategic, Plan 2016 - 2018
92. Oliver OCP, 2016
93. Elkford OCP, 2010
94. Elkford Community profile, 2016
95. Our Heritage Historic Places, Heritage Strategy for BC
96. Trails Strategy for British Columbia, 2012
97. Thompson Okanagan Regional Tourism Strategy, 2013
98. Thompson Okanagan Regional Rail Trails Tourism Strategy, 2016
99. Regional Tourism and Hospitality Industry Labour Demand and Supply Projections, 2013 (Vancouver Coast and Mountains, Thompson Okanagan and Kootenay Rockies tourism regions)
100. Selkirk College Strategic Plan 2012-2017
101. Selkirk College Education Plan, 2014-2018
102. College of the Rockies Strategic Plan, 2015-202

9.2 Regional District Boundaries Along Highway #3

Fraser Valley Regional District and Regional District of Okanagan-Similkameen

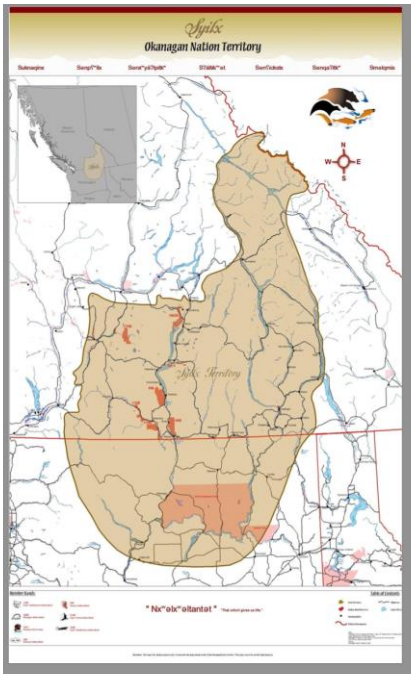
Regional District of Kootenay Boundary and Regional District of Central Kootenay

Regional District of East Kootenay

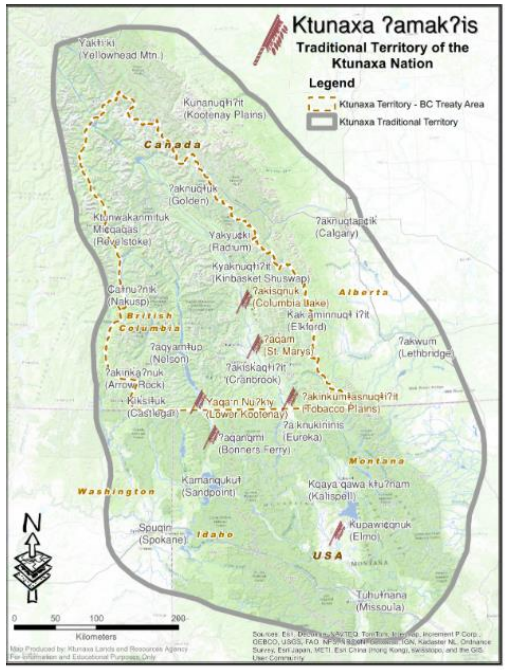
Source: Google maps

9.3 First Nations Territory

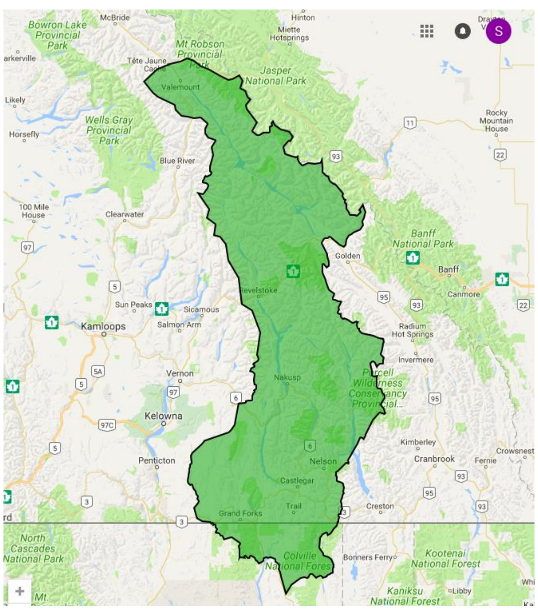
Syilx (Okanagan Nation Territory)



Ktunaxa ?amak?is Nation



Sinixt Nation (Arrow Lakes people)



Stó:lō Nation

9.4 Detailed 2015 BC Visitor Volume and Revenue

Domestic and International Visitation and Expenditures, 2013-2015

Domestic Markets	Visitor Volume (,000 persons)			Market Share	Growth	Expenditures ($million)			Market Share	Growth
	2013	2014	2015[1]		('13-'15)	2013	2014	2015[1]		('13-'15)
Canada (overnight)	14,683	14,223	13,820	100%	-6%	$5,670	$5,437	$5,610	100%	-1%
British Columbia	10,745	10,557	10,448	76%	-3%	$3,134	$3,218	$3,375	60%	8%
Alberta	2,766	2,531	2,320	17%	-16%	$1,523	$1,208	$1,356	24%	-11%
Ontario	677	587	601	4%	-11%	$545	$494	$487	9%	-11%

Statistics Canada, Travel Survey of Residents of Canada (includes travellers who spent one or more nights in BC). Values may be subject to revision as updated data becomes available.

[1] *Estimated based on partial year Travel Survey of Residents of Canada data (3/4 quarters reported).*

International Markets	Visitor Volume (,000 persons)			Market Share		Growth	Expenditures ($million)			Market Share		Growth
	2013	2014	2015	In Region	Overall	('13-'15)	2013	2014	2015	In Region	Overall	('13-'15)
Overall	4,378	4,724	5,086		100%	16%	$3,894	$4,317	$4,648		100%	19%
Asia/Pacific	794	894	937	100%	18%	18%	$1,201	$1,357	$1,427	100%	31%	19%
China	187	236	247	26%	5%	32%	$292	$374	$394	29%	9%	35%
Australia	173	183	186	20%	4%	7%	$389	$416	$427	28%	9%	10%
Japan	98	110	125	13%	2%	28%	$106	$121	$139	10%	3%	31%
South Korea	67	73	80	9%	2%	18%	$86	$94	$104	8%	2%	21%
India	51	62	67	7%	1%	30%	$38	$46	$50	3%	1%	32%
Europe	522	543	560	100%	11%	7%	$737	$774	$807	100%	17%	9%
United Kingdom	232	237	239	43%	5%	3%	$336	$347	$353	43%	7%	5%
Germany	107	111	112	20%	2%	4%	$143	$150	$152	19%	3%	6%
North America	3,015	3,148	3,438	100%	68%	14%	$1,899	$2,017	$2,227	100%	47%	17%
United States (overnight)	2,948	3,067	3,349	97%	66%	14%	$1,784	$1,875	$2,070	93%	44%	16%
Washington	1,323	1,376	1,503	44%	30%	14%	$499	$524	$579	26%	12%	16%
California	426	443	484	14%	10%	14%	$339	$356	$393	18%	8%	16%
Mexico	67	81	89	3%	2%	33%	$115	$142	$157	7%	3%	37%

Destination BC estimates. Values may be subject to revision as updated data becomes available.

9.5 Crown Land Policy Details

The Ministry of Forests, Lands and Natural Resource Operations (FLNRO) is largely responsible for the administration of Crown Land under the Land Act as well as the Ministry of Lands, Parks and Housing Act. In urbanized areas, local governments (municipalities and regional districts) have authority over land use policies.

The Crown land policies use established principles regarding types of uses permitted, allocation, tenure term (number of years of occupancy permitted), pricing and other aspects. First Nations' communities throughout British Columbia have an interest in Crown land allocation. Therefore, consultation with First Nations is an important part of any land use allocation and planning decisions.

The principal land use policies that govern the tourism oriented commercial uses of provincial Crown land include:

- Adventure Tourism/Commercial Recreation Land Use Policy;
- ASR and Commercial Alpine Ski Policy; and
- General Commercial Land Use Policy for Crown Land.

The ALR is provincially zoned land in which agriculture is recognized as the priority use. Farming activities are encouraged through various mechanisms and non-agricultural uses are restricted through regulation. ALR land use policies relevant to tourism include:

- Retail sales
- Wineries and cideries
- Agri-tourism activities
- Agri-tourism accommodation
- Bed and breakfast use

It should be noted that this applies to farms located on the ALR anywhere in BC and this land is frequently privately owned and not provincial Crown land.

9.6 Net Promoter Score

The Net Promoter Score (NPS), developed by Frederick Reichheld and Bain & Company in 2002, is a simple metric that helps organizations monitor the engagement of their customers. It reflects the likelihood that customers will recommend a product/company/place to friends, family or colleagues.[46]

In the context of the tourism industry, NPS is based on responses to the question, "How likely are you to recommend [Insert Name] as a travel destination to a friend, family member or colleague?" Responses are scored from 0 = "not at all likely" to 10 = "extremely likely". Respondents are divided into three categories:

- **Detractors** (scores of 0 to 6): Unhappy visitors, unlikely to tell others to visit and might even damage the reputation of a destination through negative word of mouth.
- **Passives** (scores of 7 or 8): Marginally satisfied visitors not excited enough to tell others about their travel experience.
- **Promoters** (scores of 9 or 10): Loyal enthusiasts likely to return and rave about their travel experience.

NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.

NET PROMOTER SCORE = % OF PROMOTERS - % OF DETRACTORS

The intention to recommend a travel destination, reported by the NPS, is a proxy measure of overall satisfaction with the travel experience. Satisfaction with the travel experience and the intention to recommend greatly increase the likelihood of a return visit to British Columbia. And word of mouth advocacy, either face-to-face or through social media, is critical for attracting first time visitors to British Columbia.

NPS is regarded by researchers as the question that best predicts the future growth of customer centric businesses like the tourism industry. Many tourism businesses and destination management organizations, including Destination Canada, are also measuring NPS to help monitor and measure efforts to improve customer loyalty.

Destination BC measures NPS through an annual consumer research study conducted in BC's five key North American Markets (BC, Alberta, Ontario, Washington State and California). BC's Net Promoter Score (NPS) is relatively high in all markets (ranging from +62 to +72).

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[46] The following has been provided by Destination BC: http://www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx. The original research that developed NPS is described in an article by Frederick F. Reichheld in the Harvard Business Review: https://hbr.org/2003/12/the-one-number-you-need-to-grow.

9.7 Community Organizations

1. Sparwood Futures Society
2. Hope and District Arts Council
3. Hope Mountain Centre for Outdoor Learning
4. Sparwood Arts and Heritage Society
5. Sparwood Fish and Wildlife Association
6. Greenwood Heritage Society
7. Greenwood Legacy Group
8. The Greenwood Improvement Society
9. Cranbrook History Centre
10. St. Eugene's Mission (Ktnuaxa Heritage)
11. Fort Steel Heritage Town
12. Western Financial Place (Cranbrook recreation facility)
13. Kimberley's Underground Mining Railway
14. Cranbrook & District Arts Council
15. Key City Theatre (Cranbrook)
16. Cranbrook farmers Market
17. Fernie Museum
18. The Arts Station (Fernie)
19. Fernie Heritage Library
20. Princeton and District Museum & Archives
21. Vermilion Trails Society (Princeton)
22. The Princeton Arts Council
23. Osoyoos & District Arts Council
24. Osoyoos & District Museum and Archives
25. Historic Grist Mill & Gardens (Keremeos)
26. Keremeos Museum
27. Midway Community Association
28. Kettle River Museum
29. The Hope Arts Gallery
30. Grand Forks Gallery 2 Art and Heritage Centre
31. Kootenay Gallery of Art (Castlegar)
32. Mirja Vahala Art Studio (Castlegar)
33. Cranbrook Arts
34. The Arts Station (Fernie)
35. Osoyoos Art Gallery
36. Kunze Gallery (Creston)
37. Creston Valley Art Walk and Galleries
38. Sparwood's mural art depicting mining scenes.
39. Hope's Chainsaw Carvings (Chainsaw Carving Capital)
40. Selkirk Weavers' & Spinners' Guild Studio Gift Shop (Castlegar)
41. Cranbrook Community Theatre

42. Key City Theatre (Cranbrook)
43. Footlighters Theatre Society (Creston)
44. Hope Museum
45. Creston Museum
46. Greenwood Museum
47. Grand Forks Museum
48. Osoyoos Museum
49. Salmo Museum
50. Princeton and District Museum and Archives
51. Keremeos Museum
52. Historic Grist Mill & Gardens (Keremeos)
53. Kettle River/Valley Museum (Midway)
54. Fernie Museum and Historical Society
55. Fernie Heritage Library
56. Canadian Museum of Rail Travel (Cranbrook)
57. Cranbrook History Centre
58. Ktunaxa Interpretive Centre (Cranbrook)
59. Boundary Museum and Interpretive Centre - history of the Doukhobor people in Grand Forks.
60. Doukhobour Discovery Centre (Castlegar)
61. Nk'Mip Desert & Heritage Centre (Osoyoos)
62. Station Museum (Castlegar)
63. The USCC Cultural Interpretive Society Gift Shop (Castlegar)
64. Fort Steele Heritage Town (near Cranbrook)
65. Brilliant Suspension Bridge (Castlegar)
66. Kootenay Trout Hatchery (near Cranbrook)
67. Osoyoos Desert Centre
68. The Glass House (Creston)
69. Keremeos Elks Rodeo
70. Grist Mill and Gardens (Keremeos)
71. AdvantageHOPE (Economic Development and Tourism Agency)
72. Hope and District Chamber of Commerce
73. Sparwood Chamber of Commerce
74. Greenwood Board of Trade
75. Castlegar Chamber of Commerce
76. Fernie Chamber of Commerce
77. Midway Community Association
78. Ponderosa Music Festival Rock Creek
79. Shambhala Music Festival (Salmo)
80. Princeton Traditional Music Festival
81. Keremeos Bluegrass Country Jamboree
82. Okanagan Chefs Association
83. Okanagan Wine Festivals Society
84. BC Wine Grape Council

85. BC Grapegrowers Association (BCGA)
86. BC Wine Institute
87. Trails for Creston Valley Society
88. Cranbrook Chamber of Commerce
89. Fernie Chamber of Commerce
90. Okanagan Falls Visitor Information Centre
91. Nelson and Area Economic Development Partnership
92. Trail & District Chamber of Commerce
93. Red Resort Association
94. Nelson Kootenay Lake Tourism Society
95. Nelson & District Chamber of Commerce
96. Tourism Rossland
97. Tourism Kimberley
98. Kimberley Conference Centre
99. Kimberley Chamber of Commerce
100. Kimberley Conference & Athlete Training Centre
101. Oliver Tourism Association
102. Elkford Chamber of Commerce
103. Elkford Community Conference Centre
104. Trail Museum
105. The Trail and District Arts Council
106. Trail Memorial Centre
107. Trail Historical Society
108. Rossland Council for Arts & Culture
109. Rossland Museum & Discovery Centre
110. Rossland Light Opera Players
111. Rossland Potters' Guild
112. Rossland Mountain Market
113. Rossland REAL Food
114. Okanagan Falls Parks & Recreation
115. Centre 64 (Kimberley Arts Centre)
116. Kimberley Underground Mining Railway
117. Kimberley Heritage Museum
118. Kimberley Arts Council
119. Oliver and District Museum and Archives
120. Oliver and District Heritage Society
121. Oliver Community Arts Council
122. Oliver Parks & Recreation Society
123. Oliver Theatre
124. Similkameen Wineries Association
125. Okanagan Falls Winery Association
126. Oliver Osoyoos Winery Association
127. Artisans of Crawford Bay

128. Nelson and District Arts Council
129. The Civic Theatre Society (Nelson)
130. Trail and District Arts Council/Charles Bailey Theatre
131. Rossland Council for Arts and Culture
132. Trail Historical Society
133. Nelson Museum
134. Rossland Historical Museum and Archives Association
135. Rossland Mountain Market Society
136. Cottonwood Community Market (Nelson)
137. West Kootenay EcoSociety
138. Friends of Kootenay Lake Stewards
139. Rossland Society for Environmental Action
140. Nelson Area Trail Society
141. Castlegar Mountain Bike Society
142. Nelson Cycling Club;
143. Black Jack Nordic Ski Club (Rossland),
144. Castlegar Nordic Ski Club
145. Nelson Nordic Ski Club
146. Castlegar Snowmobile Association
147. Nelson Sno-Goers
148. Nelson Road Kings Car Club
149. Kootenay Lake Vintage Car Club
150. Elkford Snowmobile association
151. Wapiti Ski Hill (Elkford)
152. Elkford ATV Club
153. Elkford Project society
154. Hedley Heritage Museum
155. Mascot Mine Museum (Hedley)
156. Friends of Fort Steele Society
157. Lower Columbia Community Development Team Society (LCCDTS)

9.8 Identified Constraints and Opportunities

Industry Training/Human Resources

- Staff labour shortages
- Staff retention, e.g., turnover
- Affordable Staff /Entrepreneur housing
- Transportation to assist staff in getting to/from work
- Gaps in staff skillsets
- Over-reliance on non-profit/volunteer user groups i.e. volunteer burnout

Business Operating Environment

- Gaps in representation of communities without Destination Marketing Organizations (DMO's)
- Businesses hours of operation, e.g., seasonally, days of the week
- Lack of tourism operators to provide experiences
- Inadequate base of visitation to support business viability
- Difficult to navigate the support and resources that are available to entrepreneurs
- Lack of information to support value of tourism
- Lack of community support for tourism industry/new and expanding tourism businesses

Investment & Funding

- Lack of sustainable funding stream for trail maintenance
- Lack of funding for tourism entrepreneurs
- Continuation of the Resort Municipality Initiative (RMI) funding

Product Development

- Quality and diversity of food/beverage options for travellers
- Lack of family attractions (all ages, all levels of expertise)
- Inadequate summer camping capacity
- Lack of 24-hour service facilities for travellers

Infrastructure

- Quality and diversity of accommodations
- Lack of cell service
- Lack of internet connectivity
- Inadequate water-based infrastructure (pumpouts, fuel, moorage)

Access and Transportation

- Road conditions during winter months
- Quality (safety, amenities) of rest stops and washrooms
- Lack of integrated and consistent wayfinding – Apps to Maps to Signage
- Lack of reliable air access (Castlegar, Osoyoos)

- Expensive airport landing fees for carriers (Cranbrook)
- Lack of transportation/connectivity options from airport to community
- Lack of transportation/connectivity options between communities
- Lack of transportation/connectivity options from communities to attractions (e.g. trail head)

Policy and Sustainability

- Long-term health of the ecosystems/natural assets
- Long-term retention of community character/personality
- Motorized vs non-motorized land use conflicts
- Lack of land management framework
- Inconsistent policies regarding short term housing rentals
- Addressing climate change
- Wildlife displacement from impact of human recreation
- Emergency Management Plan including visitors

Destination Management and Community Planning.

- Lack of current market research and intelligence
- Lack of education on the value of tourism
- Lack of coordination and collaboration between stakeholders
- Integrated approach to infrastructure planning/development (water, sewer etc.) to service growing visitor base

The full list of identified opportunities:

Industry Training/Human Resources

- Access to relevant and affordable tourism training programs
- Secure adequate inventory of affordable staff/entrepreneur housing
- Increase positive perceptions of working in tourism
- Improve customer service skills levels

Business Operating Environment

16. Improve understanding of the value of tourism and community support for tourism
- Secure more consistent support for tourism from municipal governments
- Facilitate businesses working together to package products together
- Improve local business supply chain
- Easier approval process for businesses and investments

Investment & Funding

- Clarify and provide road-map to support and resources that are available for businesses
- .

Product Development

- Improve vibrancy of downtown centres
- Beautification of entire route, e.g., ensure well kept amenities
- Make downtowns more pedestrian friendly
- Increase Aboriginal cultural tourism products
- Improve winter experiences
- Improve/develop iconic hiking trails
- Develop new iconic mountain biking trails
- Improve quality of culinary/food/beverage options
- Improved motorized outdoor recreational facilities
- Secure New family/all age/all ability attractions – easy to access/easy to experience
- Grow new/existing festivals and events
- Coordinate schedule of festivals and events
- Improve motorcycling experience
- Attract new food/beverage options
- Offer more farm gate experiences
- Improve storytelling of history
- Develop touring itineraries/circle routes
- Add new guided tours – recreation, cultural, heritage

Infrastructure

- Improve accessibility to experiences, e.g., mobility barriers
- More campgrounds/campsites
- More RV sites and powered campsites
- Attract new accommodation properties
- Renovate/update existing hotels
- Offer free wi-fi at regular intervals

Access and Transportation

- Addressing negative perceptions of road safety
- Adding more passing lanes
- Adding more rest stops and pull offs
- Improve road and bridge maintenance
- Improve bus/shuttle transportation options/schedules
- Improve wayfinding signage (Apps to Maps to Signage consistency)
- Add cultural/heritage interpretive signage
- Add more electric vehicle charging stations
- Improve highway shoulder for cycling
- Improve air access convenience and reliability
- Better access to swimming experiences along route
- Better leverage under-utilized resource roads
- Offer airport transfers to communities
- Educate visitors on winter road conditions

Policy and Sustainability

- Policy to address short term rentals
- Monitor and measure key indicators to ensure environmental protection
- Policy for maintaining scenic quality of highway viewscapes

Destination Management and Community Planning.

- Data collection and research
- Develop staff housing plan
- Strong focus on shoulder season visitation to ensure year-round business viability
- Inclusion of Alberta in Highway 3 tourism efforts
- Better communication to industry across region
- Better communication between tourism and other industries
- Increase efforts to attract new investment

9.9 Highway #3 Tourism Sub-Committee Meeting, Visioning Workshop, June 28th 2016

1. Vision for HWY#3: What will Highway #3 look like in 10 years from now?

For this first question, responses can be grouped by key aspects or elements that mainly compose the proposed vision:

a. Effective Signage: Great signage – inspirational signs – signage that influences the choice of route at the Hope turn-off
b. Safety: Safe for motorists- safe for cyclists and pedestrians – good road conditions
c. Type of transport mode: Small vehicle preferred over heavy traffic- bike friendly – EV vehicles
d. Infrastructure: Unique amenities- EV Charging stations - scenic rest stops with photo opportunities
e. Attractions & Services: Visitor attractions- excellent customer service – quality interpretation – destination "escalator" smooth journey – outdoor recreation – vibrant history - preserved natural beauty - many photogenic locations – remarkable experiences
f. Image & Perception: Scenic -small towns – unique local enclaves - destination "route" - modern reputation- recognizable brand- surprising- exceeds expectation- unique flavour – fun - positive perception – vintage feel - hashtag #hwy3- targeted audience as opposed to all things to all people – collaborative communities- multi-partners

Based on key vision elements, a vision statement is being drafted:

"In 2026, the Crowsnest Corridor is recognized as a highly regarded and top of mind scenic route by travelers and residents. It is perceived as safe, well signed, convenient and modern; yet, it offers an authentic and enriching experience to the travelers. The communities along the corridor are collaborating with each other; each of them is resilient, charming, welcoming and economically thriving. The unique and diverse culture, heritage and the natural beauty are preserved and celebrated at every turn."

2. Unifying theme: What are the main elements that tie the HWY#3 corridor together?

a. The current name "Crowsnest Highway" is recognized as having considerable brand equity amongst residents of BC and AB
b. The "Crow" is a symbol that resonates with the workshop participants. This highway is defined as the shortest– as the crow flies – between the prairies and the Pacific. An association was also made between the color of the crow and the coal mining history of the Crowsnest Pass/ Elk Valley section. Black Gold, Black Coal, Black Crow
c. The corridor is referenced as being a historic route and also an explorers' route and the adventurous character was mentioned. It somewhat shares a similar route as the historic Dewdney Trail.
d. Highway 3 also follows a similar itinerary as the TransCanada Trail in Southern BC. This trail is under major development and is sure to become a unique draw for visitors – the Kettle Valley Railway & Columbia & Western Railway, both sections of the TransCanada trail are now becoming significant attractions themselves.

e. This route is the link between the iconic Canadian Rockies and the Pacific Ocean/Vancouver, all important elements of Canada's identity as an international travel destination
f. Southern BC presents a diverse geography of unique natural beauty with several provincial parks, rivers, several mountain ranges, species of bird & wildlife that can be easily observed, as well as a diverse bio-climatic range from desert to lush temperate forest to high alpine to prairies.
g. Reference was made to the fact that each small town has its own character, culture, diversity of people, and diversity of origins. The culture is transmitted in the food, arts, and heritage buildings. Other keywords: Slow pace – "Kootenay Time" - the "sense of place" & high symbolism.
h. The corridor boasts rich aboriginal culture and history.
i. Communities along the corridor all embrace the slow food movement and provide quality, locally grown food, road-side fruit stands and a variety of locally owned and operated restaurants, cafés, pubs, etc.
j. Although the communities along the corridor are small and rural and have a preserved heritage feel, they are embracing technology and modernity, including clean energy and digital connectivity.

Other keywords: Historic highway with a modern twist (EV) – Highway # 3 – Level # 3 – Theme: Recharge!

3. Engagement: Who are the key stakeholders that need to be involved?
How are we going to get their buy-in?

- Southern Alberta HWY# 3 Association
- Need for geographic representation along the route
- Need to involve the municipality of Hope, which has considered the other municipalities along Highway#3 as "competitors" as opposed to "allies"
- All municipalities along the corridor including 3a, 3b and 43
- Chamber of Commerce as representative of business community
- Local DMOs as representative of the tourism business community
- Non-profit organizations – culture- trails
- Regional Districts
- Provincial government – MJTST- Min of Community Development- Min. of Transport- BC Parks
- Tourism businesses
- First Nation communities – Ktunaxa- Lower & Upper Similkameen- Osoyoos
- Community Energy
- Sun country or EV chargers/vehicle manufacturers