



# **Northern SLRD – Proposed Touring Routes**

## **Phase One December, 2015**



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## 1.0 Project Overview

The Squamish Lillooet Regional District (SLRD) is leading an investigation into the market potential for the creation of a series of touring routes that incorporate experiences in the Northern SLRD communities of Lillooet and Area B, Bridge River Valley – Area A. Early in 2015, the SLRD Board held a strategic planning session to identify key strategic directions and goals for its 2015-2018 term. As per the strategic plan, Goal #4 states:

*“Identifying and implementing mutually beneficial regional projects  
Goal: Achieve regional projects that deliver quick wins and long term results  
towards the goals identified; increase economic development”*

With this goal in mind, the Board identified regional tourism development as an important opportunity to generate significant economic impact, specifically in the northern areas of the region where economic development has been identified as a critical need. Tourism is already a major economic engine in the southern SLRD, and it is emerging as a viable catalyst to stimulate economic development and enhance the well-being and sustainability of the SLRD’s northern communities as well.

This initial Phase One investigation probes the opportunity to create a series of touring routes that would encourage people planning to visit the already popular tourist destinations in the southern SLRD to increase their length of stay and venture beyond Sea to Sky Country to discover the many unique tourism opportunities in the northern areas of the SLRD. As well, the large base of population in the Lower Mainland is worthy of investigation and may offer economic potential as the northern SLRD is only 4 hours away by car, yet a world away in terms of the natural and cultural assets it can share.

This report is Phase One of the investigation. It creates a foundation for further study by achieving the following:

- Completion of a tourism asset inventory for the northern SLRD (Areas A, B and the District of Lillooet) by extracting from existing asset inventories (2012 Bridge River Valley/2014 District of Lillooet/Area B) and documenting ‘visitor experiences’ using the Destination BC template with modifications to identify experiences that are ‘near market-ready vs. market-ready’ and experiences that could be considered primary contributors to the area’s unique competitive advantage;
- Identification of highest return target markets including area of origin, travel motivators and travel influencers (building upon the assessment of target markets already developed for the Bridge River Valley and for Lillooet and Area in the recent Community Tourism Planning processes facilitated through Destination BC and incorporating a more detailed review of the ‘traveller types’ that would find these routes most appealing utilizing the Explorer Quotient tool developed by Destination Canada and now available through Destination BC;
- Identification of ‘gaps’ in visitor experiences using a two-tiered assessment as to whether these ‘gaps’ must be filled for the touring routes to be successful (show-

stoppers) or if these 'gaps' once addressed would be enhancements to the visitor experience;

- Recommendations for touring routes for further consideration in the next phase of the project.

## **2.0 Summary of Findings – Phase One**

### **2.1 Tourism Assets/ Experience Gaps**

This Phase One investigation of the proposed Northern SLRD touring routes has identified the following tourism assets and experience 'gaps':

- There is a wealth of natural assets that can be featured in various touring routes led by two iconic natural experiences that contribute to the Northern SLRD's unique competitive advantage – the Fraser River and South Chilcotin Mountains Park.
- Area A excels in its ability to offer immersive wilderness experiences (hiking, biking, horseback riding and motorized off-road sports) and is already considered a 'bucket list' destination for mountain biking enthusiasts.
- As well as having the accommodation and retail base for the northern SLRD, the District of Lillooet and Area B are emerging as an agri-tourism destination with an award-winning winery, organic hops growers, local produce and Farmer's market
- These assets are complemented by a variety of local arts, culture and heritage experiences including talented artisans, local museums, Aboriginal culture and the lore of the Gold Rush Trail and Bralorne gold production.
- There are several festivals and events that occur annually that enhance the visitor experience as part of a broader touring itinerary; a further investment in the scope and scale of select festivals and events would prove beneficial to the promotion of touring routes.
- Certain preconditions to travel must be addressed in parallel with the development of the northern SLRD touring routes including safe and reliable road access to northern SLRD communities – this is considered essential to the success of the proposed touring routes.
- Seasonal opening and maintenance of the Hurley Forest Service Road is critical for access to the Bridge River Valley/Area A, and as an element of a possible circle tour. Highway 99 has received significant focus and upgrades in recent years however, maintenance of Road 40, Highway 12 and the Trans-Canada through the Fraser Canyon are equally imperative to the formation of touring routes from the Lower Mainland and southern SLRD.
- The accommodation base is adequate in the Lillooet/Area B area although a 4 star resort property would be beneficial and should be supported and additional full service RV campsites/upgrades to the existing Cayoosh Creek municipal campground are also desirable.
- Area A has the resort and all-inclusive offerings available at both Tyax Resort, Tyax Adventures and Chilcotin Holidays and would benefit from more consistent motel/B&B/inn offerings – these new offerings are considered desirable but not essential to the success of the proposed touring routes.

- The base of services/visitor amenities in Lillooet and Area B is sufficient in terms of restaurants, retail services; the visitor amenities in the Bridge River Valley are very limited particularly with the recent closure of Sally's Pub in Bralorne. Continued support for local economic development efforts to attract new residents and business operators is essential in Area A.
- Support for the development of additional land and water based tour companies is required particularly in Lillooet and Area B to offer guided visitor experiences for those travellers lacking the knowledge/equipment to experience the northern SLRD on their own and to provide greater local economic impact than is available from self-guided use of natural assets – attracting these new businesses is considered desirable and will likely evolve organically as overall visitation and opportunities for profit increase.

## 2.2 Highest Return Target Markets

The available market research indicates that the largest opportunity markets for the proposed touring routes through the northern SLRD communities are BC residents (Lower Mainland in particular) and longer-haul visitors to Vancouver and Whistler who wish to explore beyond their primary destination and/or are already following a touring itinerary but have some flexibility for additional stops/experiences between their anchor destinations. In all cases, the psychographics of these travellers align with the Authentic Experiencer and Cultural Explorer traveller types identified by Destination Canada's Explorer Quotient tool.

The experiences typically being sought by these travellers include touring and visiting natural wonders, visiting national/provincial parks, hiking, camping, canoeing/kayaking – all of which are readily available in the northern SLRD. Research confirms that these outdoor activities are complemented by traveller interest in history, heritage and cultural activities. Again, the inventory of visitor experiences (Section 3.0) would indicate that these activities are available and while currently small and local in scale, offer an element of authenticity that will engage both Authentic Experiencers and Cultural Explorers.

As well, within the Lower Mainland population base there are select 'niche' markets that are passionate about a specific activity and travel to pursue their love of it. Mountain biking enthusiasts, geocaching enthusiasts, hikers and anglers can all be targeted with themed routes that incorporate the northern SLRD communities.

## 2.3 Possible Touring Routes

The completion and review of the tourism asset inventory accompanied by the assessment of highest return target markets, offers preliminary insight into possible touring routes throughout the Northern SLRD. A review of best practices in the development of touring routes conducted by Cadence Strategies for Destination BC and the Gold Rush Trail Management Committee in 2013 concluded:



*“...the foundation of a successful touring route is a collection of attractions that appeal to visitors and the interpretation of these attractions to convey a theme, meaning and relationship.”*

The possible themes or stories that can be considered in Phase Two of the northern SLRD Touring Routes initiative include:

- Might and Majesty – circle tour from the Lower Mainland through the Fraser Canyon to Lillooet/Area B with possible extensions into Area A if vehicle permits, Pemberton, Whistler and Squamish featuring sightseeing, hiking and cultural/heritage experiences;
- Culinary Delights – circle tour from the Lower Mainland through the Fraser Valley to Lillooet/Area B and Pemberton featuring wineries, farm to table, Farmers Markets, festivals, you-picks etc.;
- Farther/Deeper/Higher – passion-themed tours for mountain bikers, hikers, winter backcountry enthusiasts encouraging them to go beyond;
- Step Back in Time – Cultural Exploration featuring Aboriginal culture, Gold Rush heritage;
- So Close Yet A World Away – Getaways and Escapes;
- Anglers’ Heaven – a tour of the northern SLRD’s best angling;
- Dual Sport/Off Road Adventures – motorized off-road adventures.

## **2.4 Next Steps – Phase Two**

Phase Two of the investigation into the proposed Northern SLRD touring routes is recommended to include:

- Additional engagement with the St’át’imc and community stakeholders should be undertaken to ensure alignment with St’át’imc values and to address community concerns as well as to secure support and generate additional ideas for touring routes
- Primary in-market research to confirm travel motivators, messaging and itinerary experiences
- Detailed touring route development
- Overall feasibility assessment of proposed touring routes including recommendations related to the establishment of a governing body and development of initial strategies for experience development, marketing and promotion

## **3.0 Tourism Asset Inventory/Gaps in Visitor Experiences**

Detailed tourism asset inventories for the Northern SLRD are attached as Appendix A and B to this report. The inventories employ the template utilized across the Province by Destination BC in their Community Tourism Foundations planning process. Use of this template allows for cross-community consistency and will support future partnership

discussions. The inventories in Appendix A and B consider the following categories of tourism assets:

- Accommodation
- Specialty Resorts
- Conference and Meeting Facilities
- Sporting Facilities
- Parks and Natural Areas
- Campgrounds
- Golf
- Winter Activities
- Festivals & Events
- Heritage, arts and culture
- Agricultural
- General Attractions
- Shopping
- Water Based Tours
- Land Based Tours
- Other
- Infrastructure (Access, Parking, Visitor Amenities, Visitor Services)

### **3.1 Motivating/Enhancing Visitor Experiences**

A review of the completed tourism asset inventory identifies that the northern SLRD has a wealth of natural assets as reflected in the long listings of parks and natural areas that could serve as trip motivators. There are two iconic natural features that have potential to serve as the market 'lure' and basis for developing a unique competitive advantage and market messaging – the Fraser River and South Chilcotin Mountains Park. The Fraser River as seen from many vantage points in and around Lillooet is breathtaking and comparable in scope and scale to the Grand Canyon. South Chilcotin Mountains Park is equally iconic with the Bridge River Valley offering 360 degrees of wilderness – one of the closest immersive wilderness experiences to the Lower Mainland. While not listed in the inventory, the climate of the area is also worthy of note offering many more dry and sunny days than the southern SLRD.

Area A excels in its ability to offer immersive wilderness experiences (hiking, biking, horseback riding and motorized off-road sports) and is already considered a 'bucket list' destination for mountain biking enthusiasts. As well as having the accommodation and retail base for the northern SLRD, the District of Lillooet and Area B are emerging as an agri-tourism destination with an award-winning winery, organic hops growers, local produce and Farmer's market. The Lillooet Agriculture and Food Society has recently been formed with a mandate to enhance the agricultural viability of the Lillooet region and promote awareness of local agriculture and food security.

There is an abundance of free campsites although some require 4-wheel drive to access. While not reflected in the inventory spreadsheets, the tourism plans for the Bridge River Valley/Area A and for Lillooet/Area B (extracts below) both reflect upon the developing

trail networks for hiking, mountain biking and the geocaching opportunities that currently exist.

The tourism asset inventory for the northern SLRD also identifies a significant number of festivals, events, heritage, arts and cultural offerings many of which are small in scale, offered only once per year or seasonally. As well, Aboriginal culture can be experienced during the summer season. These authentic cultural experiences enhance the visitor experience providing additional depth and texture and while they may not, on their own motivate travel, when combined with the natural assets in the northern SLRD, it becomes possible to begin to envision a collection of visitor experiences along touring routes that, with effective promotion, will penetrate target markets and secure visitation.

A further investment in the scope and scale of select festivals and events would prove beneficial to the promotion of touring routes. As well, support for the development of additional land and water based tour companies, particularly in Lillooet/Area B, to offer guided visitor experiences for those travellers lacking the knowledge/equipment to experience the northern SLRD on their own would be beneficial and would provide greater local economic impact than is available from self-guided use of natural assets. Attracting these new businesses is considered desirable but not essential to the success of the touring routes and will likely evolve organically as overall visitation and opportunities for profit increase.

The community tourism plans facilitated by Destination BC for Lillooet and Area B as well as for the Bridge River Valley/Area A provide a summary of visitor experiences and offer a more condensed picture of possible trip motivators/trip enhancers:

**Lillooet/Area B Visitor Experiences extracted from Community Tourism Plan, February 2015:**

Activity	Visitor Experience
Aboriginal Culture	<ul style="list-style-type: none"> <li>• Xwisten Experience Tours – traditional fishing and archaeological village tours (June to September) – market ready</li> <li>• Sekw’el’was Experience Tours – native plant nursery/botanical interpretive walks/retail sales of dried herbs, salves, jams etc. –near market ready</li> <li>• T’it’q’et Pit House – near market ready</li> <li>• Kaoham Shuttle- market ready</li> </ul>
Gold Rush Heritage	<p>Lillooet’s Golden Mile of History includes:</p> <ul style="list-style-type: none"> <li>• Lillooet Museum</li> <li>• St. Mary the Virgin Anglican Church</li> <li>• Old Suspension Bridge (1913)</li> <li>• Bridge of the 23 Camels</li> <li>• Mile ‘0’ Cairn – old Cariboo Wagon Road</li> </ul>



	<ul style="list-style-type: none"> <li>• The Chinese Rocks</li> <li>• Miyazaki House</li> <li>• St. Andrew's United Church (1896)</li> <li>• Hangman's Tree</li> <li>• Camels Barn</li> </ul>
Arts and Culture	Music at the Miyazaki (summer programming to be confirmed)
Festivals and Events	<ul style="list-style-type: none"> <li>• Walking with the Smolts Festival – May 29<sup>th</sup></li> <li>• Apricot Tsaquem Festival (late July)</li> <li>• Lillooet Harvest Festival (September)</li> <li>• Salmon in the Canyon Festival</li> <li>• Show 'N Shine</li> <li>• New Year's Pow Wow</li> <li>• Valentine's Pow Wow</li> <li>• Annual International Indigenous Leadership Gathering (early June)</li> </ul>
Wine/ Agri Tourism	<ul style="list-style-type: none"> <li>• Fort Berens Estate Winery (winner of Lieutenant Governor's Award for Excellence in BC Wines in 2014)</li> <li>• HooH (Harvesters of Organic Hops) hops growing producers</li> <li>• Malms Old Airport / Fountainview Farms Gardens tomato and organic carrot producers</li> <li>• Farmers Market Friday mornings May through October</li> <li>• Lillooet Honey – Golden Cariboo brand of pure, natural unpasteurized honey</li> </ul>
Sightseeing	<ul style="list-style-type: none"> <li>• Blackcomb Helicopters offer sightseeing tours</li> <li>• Kaoham Shuttle runs daily from Lillooet to Seton Portage and Shalalth (can return same day on Friday's only)</li> <li>• Seton Portage Japanese internment monument</li> </ul>
Bird Watching	<ul style="list-style-type: none"> <li>• Warblers, Western tanagers, harlequin ducks, lazuli bunting, bullock's oriole, western meadowlark, chukars, golden eagles, white-tailed ptarmigans, barrow's goldeneye, horned grebe, spotted sandpiper, long-billed curlew, bluebirds, common poorwills, common nighthawks</li> </ul>
Cycling Trails	<ul style="list-style-type: none"> <li>• Road biking from Pemberton to Lillooet is popular</li> <li>• Mountain biking potential exists but very few trails currently exist</li> </ul>







Hiking and Walking Trails	<ul style="list-style-type: none"> <li>• 30 hikes in the Lillooet area of varying levels of difficulty featured in the Lillooet Hiking Guide produced by the Naturalist Society 'Canyon to Alpine'. Hiking areas include Red Rock, Campground Trails, Spawning Channels, Fraser River Lions Trail, Seton Ridge, Peanut Lake Trail.</li> <li>• Jade Walk – 30 different pieces of jade displayed throughout town</li> <li>• Lillooet's Golden Mile of History</li> </ul>
Geocaching/ Geo Tourism	<ul style="list-style-type: none"> <li>• Eleven geocaching sites currently promoted together with Gold Country GeoTourism Program (see map below)</li> </ul>
Boating/Kayaking/ Canoeing/ SUP/ River Paddling (with own equipment only – no rentals available)	<ul style="list-style-type: none"> <li>• Seton Lake; Fountain Lake; Crown Lake; Pavilion Lake</li> <li>• Fraser River, Thompson River, Stein River, Cayoosh Creek – whitewater paddling opportunities</li> </ul>
Rafting/Jet Boating	<ul style="list-style-type: none"> <li>• Tours pass through the area but are not locally based</li> </ul>
Angling	<ul style="list-style-type: none"> <li>• Sturgeon and salmon fishing on the Fraser; lake based trout fishing in surrounding area</li> <li>• Sturgeon Derby – late July</li> </ul>
Rock Climbing/ Ice Climbing	<ul style="list-style-type: none"> <li>• Rock climbing and multiple 'ice falls' in area surrounding Lillooet</li> </ul>
Backcountry Ski Touring	<ul style="list-style-type: none"> <li>• Extensive terrain for experienced ski touring</li> </ul>
ATV's/quads/dirt bikes	<ul style="list-style-type: none"> <li>• Old mining and forestry roads; loop trails available in the Mud Lakes area</li> </ul>
Golfing	<ul style="list-style-type: none"> <li>• Sheep pasture golf course – 9 hole novelty course</li> </ul>
Rock hounding	<ul style="list-style-type: none"> <li>• Lillooet jade can be found on the shores of local rivers and in the surrounding mountains</li> </ul>
Local circle tours	<ul style="list-style-type: none"> <li>• Lillooet – Bridge River Valley – Pemberton</li> <li>• Lillooet – Fountain Valley – Hwy 12 return to Lillooet</li> <li>• Lillooet – Pavilion Mountain – Clinton – Historic Hat Creek Ranch – Marble Canyon – Lillooet</li> </ul>
Sport Tourism	<ul style="list-style-type: none"> <li>• Curling, hockey and baseball facilities suitable to host regional and Provincial tournaments</li> </ul>

There are geocaching sites noted on the principal website [www.geocaching.com](http://www.geocaching.com) in the Lillooet area. Geocaching has been a strategic focus for the Cariboo Chilcotin Coast Tourism Association and Gold Country Communities Society and has successfully motivated travel to

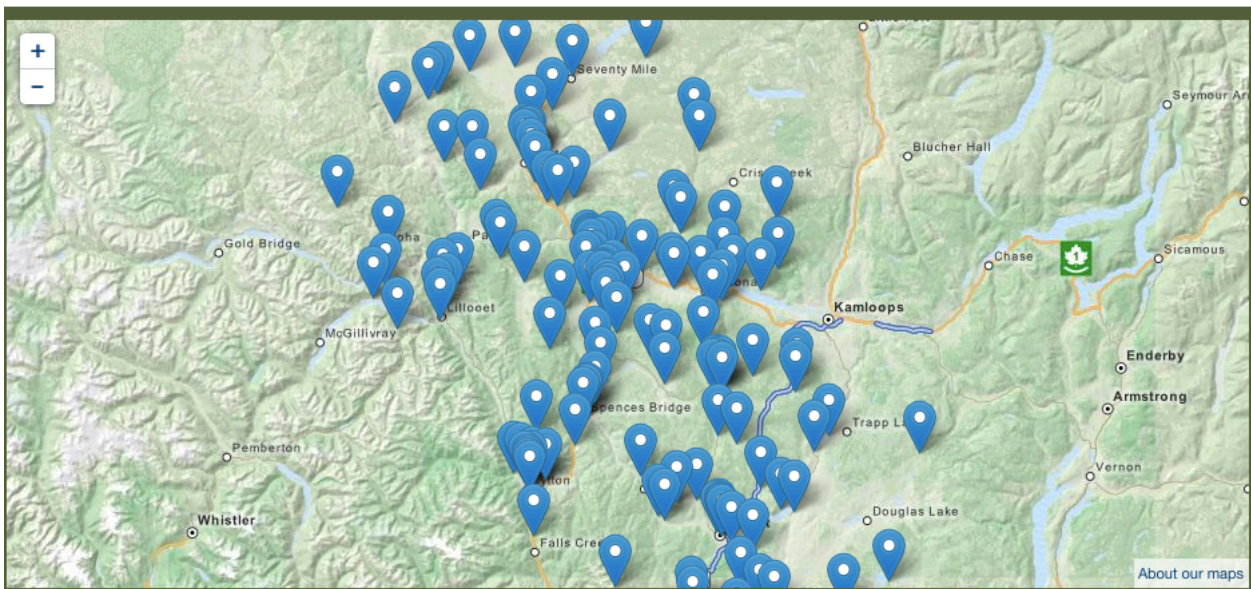
the area. Caches are strategically located to require travellers to stay overnight in the region thereby increasing yields associated with what is otherwise a ‘free’ activity.

Gold Country's GeoTourism Program has researched sites of interest throughout the region under a variety of themes & hidden caches for you to find! Learn about each site while unearthing treasures! Use your GPS or letterbox clues to locate each cache, swap some swag, then re-hide the cache.

[Visit Website](#) |   



[What is Geocaching?](#)



Caches in the area are can be found at the following link:

<http://www.geocaching.com/seek/nearest.aspx?lat=50.85591&lng=-122.83414&dist=100>

**Bridge River Valley/Area A Visitor Experiences extracted from Community Tourism Plan, September 2014**

Activity	Visitor Experience
Parks	South Chilcotin Mountains Park; Big Creek Park; Gwenyth Lake Park; Bridge River Delta Park
Heritage	Bralorne Pioneer Museum is currently being relocated; Will Haylmore site – gold panning; local crafts open during summer season; Boulbee Memorial Church; Bridge River Valley Cemetery; Bradian ghost town and a variety of other abandoned sites, mining relics; Japanese internment site; miners’ memorial;



Arts and Culture	Local artists display work at Rock Wall Gallery in conjunction with Will Haylmore site (summer only)
Festivals and Events	SummerFest 2 day event over August long weekend; Winterfest – February long weekend;
Mountain Biking Trails	Extensive trail system both within and outside Parks in development – Consultation with stakeholders, legalization of trails, detailed maps, trail signage underway through Bridge River Trails Society
Hiking Trails	Extensive trail system both within and outside Parks – detailed maps, trail signage underway through Bridge River Trails Society
Horseback Riding	Extensive trail system both within and outside Parks – detailed maps, trail signage underway through Bridge River Trails Society
Boating/Kayaking/ Canoeing/ SUP	Gun Lake, Tyaughton Lake, Marshall Lake, Gwenyth Lake – however, equipment rentals are not available unless staying as a guest of Tyax Lodge on Tyaughton Lake
Angling	Pearson Pond, Mowson Pond, Tyaughton Lake, Plateau Ponds, Lajoie Lake, Kingdom Lakes
Cat Skiing	Hurley Pass
Backcountry Ski Touring	Extensive terrain for experienced ski touring
Cross country/Nordic and snowshoeing	On lakes, through valley on trails
Snowmobiling	Extensive trails and access to open backcountry terrain/ice cap – grooming of key access trails performed by local club and snowcat operator

### 3.2 Supporting Visitor Experiences

It is also important when considering the potential for touring routes throughout the northern SLRD, to distinguish between tourism assets that must be in place to support visitation (necessary but unto themselves not travel motivators) and tourism assets noted above that would either individually or collectively motivate travel.

The supporting tourism assets that must be in place for travel to the northern SLRD to be considered as a travel option include reliable and safe access routes, comfortable and clean accommodation and basic food/beverage and retail offerings to accommodate traveller needs while en-route.

Again the community tourism plans for Lillooet/Area B and for the Bridge River Valley provide concise summaries of supporting visitor experiences:

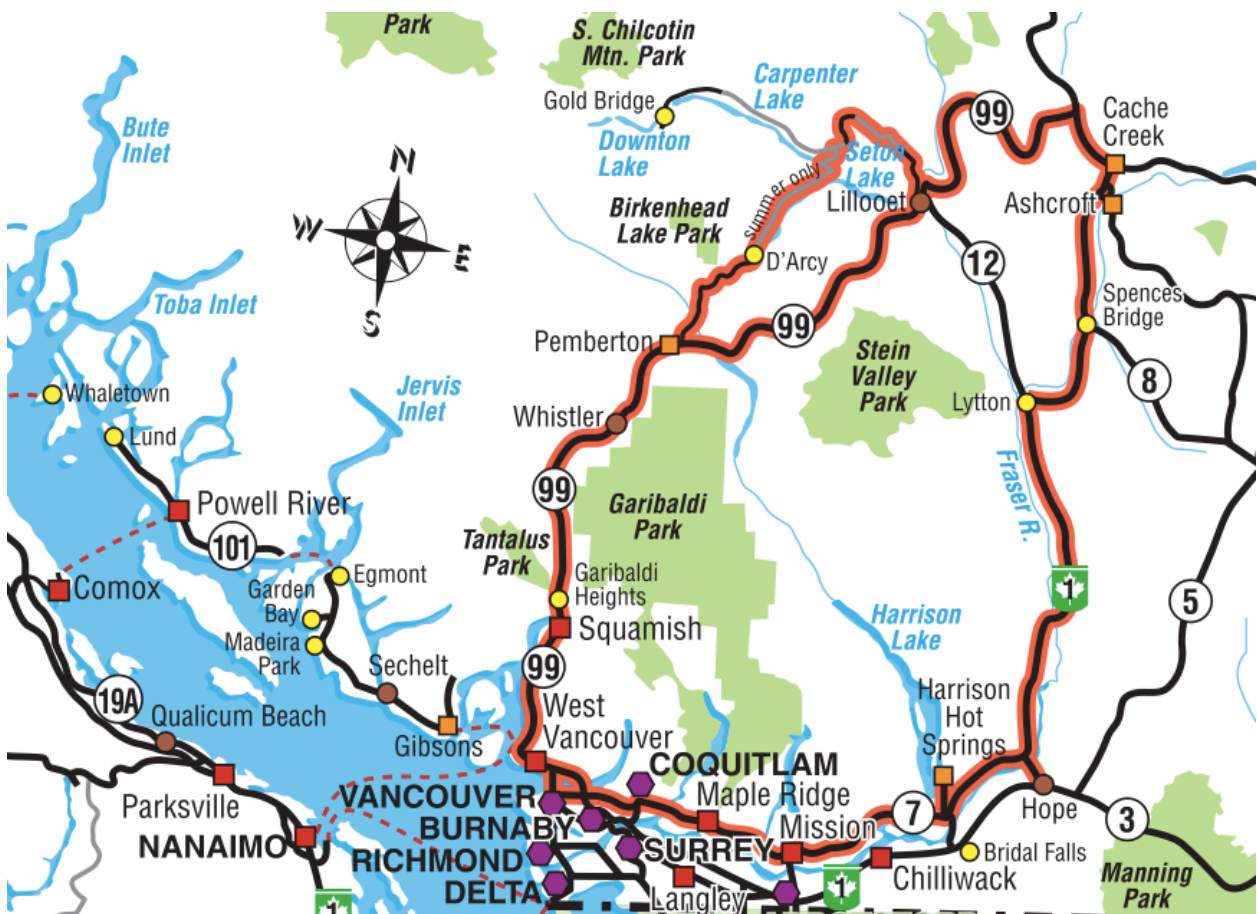
#### **Lillooet/Area B Visitor Access/Infrastructure extracted from Community Tourism Plan, February 2015:**

**Visitor Access:**

Lillooet is easily accessed from Highway 99 and is approximately 170 km west of Kamloops (2 hours) and 250 km - 325 km north of Vancouver (3-4 hours) depending upon the route chosen.

Travellers from the Lower Mainland have a choice of travelling along the TransCanada Highway to Hope and experiencing the stunning Fraser Canyon. At the junction of Highway 1 and Highway 12 in Lytton, a direct route will take travellers to Lillooet or continuing on Highway 1 will take travellers to Ashcroft, Cache Creek and Historic Hat Creek Ranch, where Highway 99 completes a longer circle tour. Highway 12 is a picturesque albeit winding, narrow road to be enjoyed at a leisurely touring pace.

Alternatively, travellers from the Lower Mainland can take Highway 99 north to Whistler and follow it beyond Pemberton across the Duffey Lake Road to Lillooet. The combination of these two routes makes a memorable circle tour with Lillooet as an ideal overnight stop.



Travellers touring from Calgary/Banff to Whistler/Vancouver will most frequently take a combination of Highway 99 and Highway 1 although there are several other options that would by-pass Lillooet including Highway 5 south from Kamloops.

In all of these routes, Lillooet's town centre is just up the hill from the primary highway and, anecdotally, much of this traffic volume does not take the time to venture 'up the hill' to experience Lillooet. Ideally, discussions with Ministry of Transportation officials would lead to the placement of a permanent traffic counter so specific 'capture rates' could be calculated.

The large resident population base in the Okanagan is also only 300 km/4 hours from Lillooet (based upon Kelowna to Lillooet). Fort Berens Estate Winery's growing reputation offers potential for inclusion in wine touring programs.

A Ministry of Transportation (MoT) traffic counter was placed at the north end of the bridge crossing the Fraser River over a 4 day period in August, 2013. From the data captured, MoT estimates an Average Annual Daily Traffic of 2,541 vehicles split approximately equally in either direction.

Within the area, the Kaoham Shuttle runs daily between Lillooet and Seton Portage and Shalalth. Overnight stay is required every day except Friday. A community bus link runs through the summer from the Xwísten Community at Bridge River to Lillooet.

### **Visitor Infrastructure**

Lillooet currently offers sufficient infrastructure to support visitor experiences including camping and RV sites, motel and B&B accommodations, and a selection of restaurants and retail stores.

### **Accommodation**

While accommodation contributes to the visitor experience, in and of itself is rarely a motivator for travel; rather it serves as the base from which visitors engage in travel experiences. Consequently, it is considered a form of visitor infrastructure since it must exist in sufficient quantity and quality to support growth in visitation.

In Lillooet, there are a limited number of accommodation options. A review of the website [www.lillooetbc.ca](http://www.lillooetbc.ca) lists the following:

#### **Hotels/Motels:**

- 4 Pines Motel
- Hotel DeOro
- Hotel Victoria
- Mile-0-Motel
- Retasket Lodge
- Reynolds Inn

**B&Bs:**

- Honeyman Falls B&B
- Sturgeon Bay B&B
- Axel's Bikers Inn
- Clearmountain Country B&B
- Fraser Cove Guest Cottage

**Campgrounds:**

- Cayoosh Creek Campground (some full service)
- Fraser Cove Campground (some full service)
- Retasket RV Park (8 full service sites)
- Willows at 6 Mile (some full service)
- Seton Lake BC Hydro Campground (Free)
- Various forest service campsites

The property types are modest and there is an opportunity for a more up-scale accommodation option and/or resort/lodge property. As well, more full service RV sites are needed and that the local campground at Cayoosh Creek requires improvements in its service, facility maintenance levels and amenities.

**Restaurant/Retail**

Much like accommodation, visitors require a range of restaurant and retail options to support their experience. The following Lillooet restaurants are listed on [www.lillooetbc.ca](http://www.lillooetbc.ca):

- The Cookhouse – family restaurant/Western cuisine
- The Lillooet In – Western/Japanese cuisine
- Hotel D'Oro Coffee Shop – coffee/pastries/soups/sandwiches
- The Rugged Bean Coffee Shop - coffee/pastries/soups/sandwiches
- Dina's Place – Greek/Italian
- The Totem Restaurant – Chinese/Western
- A&W – fast food
- Subway Sandwiches – fast food
- May Wong Restaurant – Chinese buffet/Western cuisine
- The Old Mill Restaurant – Western cuisine
- Mile O Pizza
- Esso Station – meat pies/sandwiches; outdoor concession in summer
- Lightfoot Gas – baked goods, sandwiches, bannock
- Deano's Pizza – pizza, lasagna
- Xwisten Bearfoot Grill – traditional BBQ salmon/bannock, hot dogs

Fuel, groceries, and essential retail items are found in Lillooet which functions as a regional service centre for the area. KC Health & Gifts and The Jade Place offer souvenir items. Health care facilities are also located here, and Thompson Rivers University offers continuing studies on their Lillooet campus.

### **Conclusions/Implications – Access and Infrastructure**

Lillooet is readily accessible although drivers on the winding roads leading there must take care, and local government and community groups are lobbying for additional safety measures such as concrete barriers to be implemented along the Highway. There are several potential routes to reach Lillooet and the opportunity exists to leverage possible circle tours for short getaways and longer touring vacations.

The existing accommodation, retail and restaurant and other services is considered adequate in the short-term to begin to achieve Lillooet’s tourism goals and objectives as outlined in this plan. However, local government support through zoning/bylaws etc. should be secured to advance opportunities for the development of additional full-service RV sites and to support potential business interests in resort development independently or in partnership with existing businesses or the northern St’at’imc Nation.

### **Bridge River Valley/Area A Visitor Access/Infrastructure extracted from Community Tourism Plan, September 2014:**

#### **Visitor Access**

The Bridge River Valley is accessed on a year round basis by Highway #40 from Lillooet. From June through October, it is also accessed from the Pemberton Valley along the Hurley River Road, a gravel Forest Service Road. As much of the current visitation to the Bridge River Valley is from the Sea to Sky Corridor, this latter route, if properly maintained, is considered preferred as it is 60 minutes shorter than the Lillooet option. However, over the last 8-10 years, the standard of maintenance on this road has been highly variable and generally deteriorated to the point where it became a deterrent to visitation. In 2014, Hurley River Road maintenance became the responsibility of one Provincial Ministry and noticeable improvements occurred. While still a ‘backcountry road,’ owned vehicles of any sort can now traverse it. However, rental vehicles are still not insured for travel on the Hurley River Road and this represents a significant limitation particularly for longer-haul travel markets.

Highway #40 is still considered by many to be a challenging drive, however when combined with the Hurley River Road, offers an appealing circle route where travellers along popular touring routes such as the TransCanada from Calgary/Banff to Whistler/Vancouver could detour at Lillooet, travel by Highway #40 to the Bridge River Valley and then reconnect with Pemberton via the Hurley River Road and then travel onwards to Whistler and Vancouver.

#### **Visitor Infrastructure**

The Bridge River Valley offers limited infrastructure to support visitor experiences including some accommodation options in Bralorne, Gold Bridge, Gun Lake and Tyaughton Lake, a grocery store/liquor/hardware store in Gold Bridge and fuel in both Gold Bridge and Bralorne. There is a pub and café in Bralorne (note: now closed) and a restaurant in the Gold Bridge Hotel. In addition to the full suite of spa services at Tyax Lodge, there is one independent massage therapist (Ravenswood Healing Arts). Outdoor experiences/

infrastructure include an extensive trail network for hiking, mountain biking, horseback riding; Provincial parks; lakes; rivers and campsites. Additional details of this visitor infrastructure are provided below:

### **Accommodation**

In the Bridge River Valley, there are a limited number of accommodation options. A review of the website [www.bridgerivervalley.ca](http://www.bridgerivervalley.ca) lists the following:

- Tyax Wilderness Resort, Tyaughton Lake
- Gold Bridge Hotel, Gold Bridge
- Highland Cream Resort on Gun Lake (note: now accepting only repeat guests)
- Mines Motel, Bralorne (note: at risk of closure)
- Morrow Chalets, Tyaughton Lake
- Gold Dust Motel, Gold Bridge (note: at risk of closure)
- Chilcotin Holidays, Gun Creek Road
- Bralorne Pioneer Motel, Bralorne

As well, the Bralorne Adventure Lodge has recently opened in Bralorne.

Campgrounds within or near the Bridge River Valley are listed as follows:

- Gun Creek Hydro Site
- Bridge River Retreat, Gold Bridge
- Friburg Forest Service Campground, Tyaughton Lake
- Tyax Lodge Campsite
- Chilcotin Holidays Campsite
- Kingdom Lake Forest Service Campground, Bralorne
- Gun Lake Forest Service Campground, Gun Lake
- Gwenyth Lake Forest Service Campground, Hurley FSR

The property types range from full-service to basic facilities. This existing inventory of accommodation appears to support the objective of increasing overnight visitation, length of stay and visitor spending on a year round basis.

### **Restaurant/Retail**

Much like accommodation, visitors require a range of restaurant and retail options to support their experience. The 2014 Visitor Guide lists the following food and beverage options:

- Gold Bridge Hotel Pub & Restaurant
- Lone Goat Coffee – Bralorne (note – now closed)
- Mineshaft Pub (aka Sally’s Pub) – Bralorne (note – now closed)
- Tyax Wilderness Resort & Spa (restaurant also open to the public during the summer season)

Retail experiences are limited but do include groceries (Gold Bridge); gifts (Bralorne) and local crafts (Haymore site). Fuel, tire repair and towing services are also available locally.

### **Conclusions/Implications – Access and Infrastructure**

Access to the Bridge River Valley is challenging for most. Consequently, the quality of road maintenance must remain a continued priority. While there is no intention to pursue a ‘four lane paved highway’, a certain minimal and consistent level of maintenance must be achieved to remove access as a significant deterrent to travel. As well, the nature of experiences offered must be world-class and compelling if they are to overcome the hurdle of access. By the same token, once in the area there is a sense of remoteness – the Bridge River Valley is truly the closest 360-degree wilderness experience to Vancouver and Whistler. Challenging access can be used to justify and promote longer lengths of stay provided the range and quality of visitor experiences are available.

### **3.3 Tourism Asset Inventory Conclusions**

A review of the tourism asset inventory and summaries from the relevant community tourism plans reveals the following experience assets and experience gaps related to the necessary preconditions to travel or ‘supporting’ visitor experiences:

- Safe and reliable access to northern SLRD communities must continue to be a focus of local and Provincial governments in parallel with the development of these proposed touring routes. Seasonal opening and maintenance of the Hurley Forest Service Road is critical for access to the Bridge River Valley/Area A and as an element of a possible circle tour. Highway 99 has received significant focus and upgrades in recent years however, maintenance of Road 40, Highway 12 and the Trans-Canada through the Fraser Canyon are equally imperative to the formation of touring routes from the Lower Mainland and southern SLRD.
- The accommodation base is adequate in the Lillooet/Area B area although a 4 star resort type property would be a welcome addition to the mix and should be supported and additional full service RV campsites/upgrades to the existing Cayoosh Creek municipal campground are also desirable.
- Conversely Area A has the resort and all-inclusive offerings available at both Tyax Resort and Chilcotin Holidays and would benefit from more consistent motel/B&B/inn offerings.
- The base of services/visitor amenities in Lillooet and Area B is sufficient in terms of restaurants and retail services; the visitor amenities in the Bridge River Valley are very limited particularly with the recent closure of Sally’s Pub in Bralorne. Continued support for local economic development efforts to attract new residents and business operators is essential in Area A.

With regard to motivating and enhancing visitor experiences, the following conclusions arise:

- There is a wealth of natural assets that can be featured in various touring routes led by two iconic experiences that have the potential to define the northern SLRD’s unique competitive advantage – the Fraser River and South Chilcotin Mountains Park.

- Area A excels in its ability to offer immersive wilderness experiences (hiking, biking, horseback riding and motorized off-road sports) and is already considered a 'bucket list' destination for mountain biking enthusiasts.
- As well as having the accommodation and retail base for the northern SLRD, the District of Lillooet and Area B are emerging as an agri-tourism destination with an award-winning winery, organic hops growers, local produce and Farmer's market.
- These assets are complemented by a variety of local arts, culture and heritage experiences including talented artisans, local museums, Aboriginal culture and the lore of the Gold Rush Trail and Bralorne gold production.
- There are several festivals and events that occur annually that enhance the visitor experience as part of a broader touring itinerary; a further investment in the scope and scale of select festivals and events would prove beneficial to the promotion of touring routes.
- Support for the development of additional land and water based tour companies is required to offer guided visitor experiences for those travellers lacking the knowledge/equipment to experience the northern SLRD on their own and to provide greater local economic impact than is available from self-guided use of natural assets – attracting these new businesses is considered desirable and should evolve organically as overall visitation and opportunities for profit increase.

## **4.0 Highest Return Target Markets**

### **4.1 Overview**

In order to develop an understanding of the highest return target markets for the proposed touring routes throughout the northern SLRD, a review of the Community Tourism Plans for Lillooet and Area (February, 2015) and for the Bridge River Valley (September, 2014) was conducted. These plans both assessed market research available through Destination BC available at [www.destinationbc.ca/resources/tourismplanningresources/tourismresearch](http://www.destinationbc.ca/resources/tourismplanningresources/tourismresearch).

As well, the Explorer Quotient tool developed by Destination Canada and now utilized extensively by Destination BC was considered as a means of identifying the traveller type best aligned with the experiential offerings available in the Northern SLRD communities. Additional information on this tool can be found at [www.en.destinationcanada.com/resources-industry/explorer-quotient](http://www.en.destinationcanada.com/resources-industry/explorer-quotient)

### **4.2 Research Highlights**

Market research highlights relevant to the northern SLRD Touring Routes are as follows:

#### **4.2.1 Macro Environment**

- Tourism is an international industry.
- British Columbia's product offerings are in demand but the Province is a relatively small player in the growing, highly competitive international environment.

- In the short term, tourism performance can be volatile as it is highly tied to uncontrollable events, such as weather conditions or rapid changes in economic events.
- In the long term, healthy growth is forecasted – UNWTO forecasts global growth in international tourist arrivals annually until 2030<sup>1</sup>.

#### 4.2.2 Consumer & Travel Trends

- Fluctuating world economy continues to create uncertainty resulting in continued lower levels of consumer confidence/outlook and impact on discretionary spending; some signs of increasing consumer confidence arising from positive outlook for US economy.
- Declining fuel prices increase the affordability of drive vacations and support the potential for increasing travel from the drive markets such as BC, AB and nearby US states (WA, MO, ID).
- Recent declines in the value of the Canadian dollar increase the attractiveness of Canada to US travellers.
- All things considered, travel interest is on the rise.

#### 4.2.3 BC Tourism Trends

- In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent \$8.6 billion, a decline of 2.2% from 2011.
- Over half of the visitors (58.5%) were British Columbia residents.
- Visitors from other parts of Canada accounted for 17.6% of all visits.
- International visitors accounted for the remaining 23.9% of visitor volume (US 16.4%; Asia/Pacific 4.0%; Europe 2.8%).
- British Columbia has been experiencing steady, reliable growth from BC residents and from the rest of Canada with more volatility in other markets.
- The greatest proportion of overall visitor spending is from BC residents (37.7%); the rest of Canada represents 23.9% of expenditures; while US resident spending represents 17.9%; Asia/Pacific 10.5%; Europe 7.9%.
- While BC residents spend less per visit, they still represent an attractive target market because they:
  - Experience less volatile travel patterns;
  - Travel year-round;
  - Accept varying qualities of facilities;
  - Are willing to explore the Province.

<sup>1</sup> Tourism Towards 2030, World Tourism Organization UNWTO, 2011

<sup>2</sup> Our Corporate Strategy, Destination BC:

<http://www.destinationbc.ca/cmspages/getfile.aspx?guid=55651809-3ab6-4f0e-ba36-9bffb8de7ef9>

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#### **4.2.4 Cariboo Chilcotin Coast Regional Profile and Vancouver, Coast & Mountains – Regional Profiles (2014)**

The northern SLRD is part of both the Cariboo Chilcotin Coast tourism region and the former Vancouver, Coast & Mountains tourism region. As well, much of the area’s current visitation either resides in or passes through the Vancouver, Coast & Mountains tourism region. Consequently, both tourism regions have been considered below.

##### **Cariboo Chilcotin Coast:**

In 2012, overnight tourism in British Columbia generated 17.9 million person-visits and \$8.6 billion in related spending. The Cariboo Chilcotin Coast tourism region represents 3% of provincial overnight visitation and 1% of related spending.

The Cariboo Chilcotin Coast received approximately 549,000 overnight person-visits in 2012 and generated over \$119 million in related spending. Domestic overnight travellers accounted for 86% of visitation and 73% of related spending. International travellers accounted for 14% and 28% respectively. The top five markets by area of origin for the region are:

	Area of Origin	Share of Visitation	Share of Spending
1	British Columbia	80%	67%
2	Alberta	3%	3%
3	Washington	3%	3%
4	Germany	2%	3%
5	Switzerland	1%	3%

On average, domestic travel parties in the Cariboo Chilcotin Coast tourism region stayed 3.2 nights and spent \$82 per night during their trip. US travel parties stayed 3.1 nights and spent \$222 per night during their trip, and other international travel parties (excluding the US) stayed 5.9 nights and spent \$127 per night during their trip in the region.

Most people travelled in the Cariboo Chilcotin Coast during the peak summer months, particularly Canadians from outside of British Columbia, US residents and other international travellers. British Columbians travelled throughout the year. Over a third of US residents and other international travellers visited during the spring time (April to June). With the exception of BC residents, all markets travelled the least during October to March.

Top five trip activities of visitors to the Cariboo Chilcotin Coast region often include a range of outdoor activities as well as museums, art galleries and historic sites.

**Top 5 trip activities:**

	BC residents	Other Canadians	US residents	Other international
1	Camping	Beach	National, provincial or nature park	National, provincial or nature park
2	Boating/ kayaking/ canoeing	Boating/ kayaking/ canoeing	Historic site	Historic site
3	Hiking or backpacking	Golfing	Camping	Camping
4	Wildlife viewing or bird watching	Camping	Fishing	Zoo or aquarium
5	National, provincial or nature park	Museum or art gallery	Museum or art gallery	Boating

**Vancouver, Coast & Mountains:**

The Vancouver, Coast & Mountains region represents 46% of provincial overnight visitation and 54% of related spending. In 2012, the region received 8.3 million overnight person-visits in 2012 and generated \$4.7 billion in related spending. British Columbia residents make up the largest proportion of visitors (46%) and spending (22%) in the region (spending is relatively low compared to BC's other tourism regions).

Washington (10%), Alberta (6%) and Ontario (5%) represent the next 3 largest sources of visitors to this region. California residents represent 4% of visitation and 5% of spending. International travellers accounted for 40% of visitation and 57% of spending.

When business travellers are excluded and only leisure travellers are measured, the source of visitation changes somewhat:

- BC residents – 45% of visitor volume; 24% of spending;
- Other Canadians – 8% of visitor volume; 14% of spending;
- US residents – 32% of visitor volume; 28% of spending;
- Other international – 14% of visitor volume; 34% of spending;

On average, domestic travel parties in the Vancouver, Coast & Mountains region stayed 3.4 nights and spent \$155 per night during their trip. US travel parties stayed 3.6 nights and spent \$236 per night during their trip, and other international travel parties stayed 13.6 nights and spent \$126 per night during their trip in the Vancouver, Coast & Mountains region.

Top 5 trip activities:

	BC residents	Other Canadians	US residents	Other international
1	National/provincial/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/ 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/snowboarding	Festival or fair

#### 4.2.5 Visitor Characteristics – By Market

Destination BC provides market research related to visitor characteristics by their area of origin as well as by the activities in which travellers participate. Detailed reports are available on <http://www.destinationbc.ca/Research.aspx> and summary highlights are provided below:

##### 4.2.5.1 British Columbia Residents

- British Columbians took 10.5 million overnight trips within BC in 2012
- All age groups are represented – 38% are aged 18-34
- 74% have some post-secondary education
- Affluent – 44% have household incomes over \$100,000
- 2.9 night average stay for a trip in 2012
- Beaches, hiking and camping are most popular activities

##### 4.2.5.2 Albertan Travellers

- Alberta travellers took 2.1 million overnight trips to BC in 2012
- Peak travel is summer months – July/August
- Largest age group was 25-34 in 2012 representing 25% of travellers
- Affluent – 54% had household incomes over \$100,000
- 72% have at least some post secondary education
- Alberta visitors spent 5 nights on average during their trip in BC
- Beaches, hiking and camping are most popular activities

##### 4.2.5.3 Ontario Travellers

- Ontario travellers took 562,000 overnight trips to BC in 2012
- Peak travel is summer months – July/August
- Largest proportion of travellers are 18-44 years of age
- 74% had household incomes over \$100,000
- 79% had at least some post-secondary education

- Ontario visitors spent 6.2 nights on average during their trip to BC
- Visiting parks, hiking and visiting museums and galleries are the most popular activities

#### 4.2.5.4 US Travellers

- In 2013, almost 3 million Americans visited BC and stayed overnight
- Washington (41%) and California (14%) accounted for over half of the total overnight US visitation in BC
- Travellers 55 years and older accounted for almost half of travellers from the US in 2012 although the proportion of younger travellers is rising
- June, July and August were the most popular travel months for US visitors in 2012 accounting for almost 50% of visitation
- Shopping and sightseeing were the most popular activities for US travellers in 2012; increasing participation rates in sports or outdoor activities since 2009 data
- Gravitate to Vancouver, Coast & Mountains region (Vancouver/Whistler) and Vancouver Island

#### 4.2.5.5 United Kingdom

- In 2013, almost 650,000 UK residents travelled to Canada; 30% entered directly through BC
- In 2012, over 50% of UK visitors to Canada were 55 years of age or older;
- In 2012, UK travellers to Canada spent on average 15 nights in Canada and 12 nights in BC
- Most frequently, UK visitors to Canada stayed one to two weeks
- Almost half of UK residents visited Canada in June to August
- Sightseeing and shopping remained the most popular activities for UK travellers to Canada

#### 4.2.5.6 Germany

- In 2013, over 300,000 Germans travelled to Canada; just over one-quarter entered directly through BC
- In 2012, almost one-third of German visitors to Canada were young adults (20 to 34 years)
- In 2012, German travellers to Canada (who also visited BC) spent on average 20 nights in Canada and 15 nights in BC
- Nearly 30% of German travellers spent three to eight weeks in Canada
- In 2012, almost 70% of German visitors Canada arrived between May and August and three-quarters arrived in July and August
- In 2012, sightseeing (87%) and shopping (79%) were the most popular activities for German travellers

#### 4.2.6 Visitor Characteristics – By Activity

Destination BC also provides market research on visitor characteristics defined by the activities they participate in while travelling. The most relevant activities for the northern SLRD communities are:

- Hiking
- Cycling and Mountain Biking
- Touring
- Heritage
- Aboriginal Cultural Tourism
- Fishing
- Festival Enthusiasts
- Wine Tourism

Highlights of this research by activity are as follows:

##### 4.2.6.1 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
- Hiking travellers also enjoy visiting natural wonders, swimming in lakes (Canadians) and visiting heritage sites/museums (Americans)

##### 4.2.6.2 Cycling and Mountain Biking (2009)

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

#### 4.2.6.3 Touring (2014)

- Approximately one-third of Canadian touring travellers are aged 18-34 years; US touring travellers tend to be older with approx. 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
- Touring travellers are also interested in city strolls, visiting national/provincial parks, historic sites, natural wonders

#### 4.2.6.4 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%)
- 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

#### 4.2.6.5 Aboriginal Cultural Tourism

- In 2010, 3.7 million overnight visits to BC included an Aboriginal cultural experience – almost double the number from 2006; approx. half of these visits are by Canadians
- Average Aboriginal cultural tourism visitor to BC tends to be female, middle to late aged, well-educated and earns an upper-middle income
- Aboriginal cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dog-sledding and horseback riding while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation and indoor activities
- Most visitors do not book their experience in advance and Aboriginal culture is frequently not a trip motivator but is considered a desirable addition to a larger vacation experience

#### 4.2.6.6 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

#### 4.2.6.7 Festival Tourism Enthusiasts

- Educated with moderate income levels
- Want to experience
  - Stroll through the city
  - See historic sites and buildings
  - Farmers markets/country fairs
  - Visit parks

#### 1.2.6.8 Wine Tourism (2009)

- Approx. half of wine tourism travellers from both Canada and the US who had been to BC and participated in a wine tourism activity were male; of travellers motivated by wine tourism activities, 60% were male
- All age groups participate in wine tourism activities and are motivated by wine tourism activities – more than one third were aged 55 years or older and US wine travellers were more likely to be older than their Canadian counterparts
- Wine tourism travellers tend to be higher income earners with at least 40% of Canadian and American wine travellers earning annual household incomes greater than \$100,000
- Pleasure travellers motivated to travel by wine-related activities are well educated with 59% of Canadians and 72% of Americans having completed post secondary education
- Other activities that wine travellers enjoy include strolling to see city buildings and historic sites/buildings and well-known natural wonders. Sunbathing/sitting on a beach and swimming in lakes and oceans were the most popular outdoor activities for wine travellers
- Hiking, golfing and downhill skiing were the most common complementary sports-related outdoors activities of interest to wine travellers – however, these activities had considerably lower incidence rates in comparison to other more general outdoor and/or culture related activities
- US motivated wine travellers show particularly strong interest in cultural activities such as: museums – history/heritage; art galleries; farmers’ markets/country fairs; botanical gardens and live theatre
- International visitors who travel to wineries have a higher interest than other visitors in cultural attractions (museums, art galleries, wine festivals – particularly those reflecting local customs and heritage)
- Proportionately more winery visitors also go to national parks and botanical or other public gardens than do other visitors

#### 4.2.7 Explorer Quotient

The Explorer Quotient is a tool developed by Destination Canada to assist communities and businesses in understanding the psychographics of travellers – the reasons why they travel



and the types of experiences they seek. This behavioral knowledge assists in identifying the types of travellers best suited to the product/experience being offered.

Traveller 'types' are defined and the destination or business is able to match the 'type' with the experiences they offer as a way of focusing marketing efforts on best potential customers and defining the nature of messaging/media tools that will reach and resonate with them. Additional information is available through Destination BC and on-line at [en.destinationcanada.com](http://en.destinationcanada.com). Destination Canada has identified the following Explorer Types as most attractive for the Canadian marketplace:

- Free Spirits
- Cultural Explorers
- Authentic Experiencers

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

The northern SLRD current visitor experiences would appear to best meet the experiential needs of Cultural Explorers and Authentic Experiencers.

As marketing efforts progress and specific campaigns are formulated and launched, they should be informed by the additional psychographic intelligence available from the EQ tool.

### **4.3 Market Research Implications and Conclusions**

The available market research indicates that the largest opportunity markets for the proposed touring routes through the northern SLRD communities appear to be BC residents (Lower Mainland in particular) and longer-haul visitors to Vancouver and Whistler who wish to explore beyond their primary destination and/or are already following a touring itinerary but have some flexibility for additional stops/experiences between their anchor destinations. In all cases, the psychographics of these travellers align with the Authentic Experiencer and Cultural Explorer traveller types identified by Destination Canada's Explorer Quotient tool.

The experiences typically being sought by these travellers include touring and visiting natural wonders, visiting national/provincial parks, hiking, camping, canoeing/kayaking – all of which are readily available in the northern SLRD. These outdoor activities are

complemented by traveller interest in history, heritage and cultural activities. Again, the inventory of visitor experiences (Section 3.0) would indicate that these activities are available and while often small and local in scale, offer an element of authenticity that will engage both Authentic Experiencers and Cultural Explorers.

As well, within the Lower Mainland population base there are select 'niche' markets that are passionate about a specific activity and travel to pursue their love of it. Mountain biking enthusiasts, geocaching enthusiasts, hikers and anglers can all be targeted with themed routes that incorporate the northern SLRD communities.

More detailed sector/market implications follow:

- BC Residents are an attractive target market for the Northern SLRD– the population of the Lower Mainland is within a 3-4 hour drive making the area accessible for short, spontaneous touring getaways.
- BC Residents are also most likely to travel throughout the year and venture into all regions of the province to enjoy outdoor activities.
- The spring/summer/fall touring market (all areas of origin) also offers opportunity to create a 'side trip' or circle tour for those travelling the primary corridor between Calgary and Vancouver .
- Motorcycle touring offers opportunity as well as private vehicle/RV touring.
- The northern SLRD communities in the Bridge River Valley offer world-class mountain biking experiences that are an excellent fit to attract cycling tourists. Average income levels are moderate (Canadian) and more affluent (American) and many cycling tourists also enjoy day hikes so there is an opportunity to create multi-activity packages and experiences using local accommodation and tourism operators throughout the Northern SLRD.
- Canadian hiking travellers represent a good potential segment for the Northern SLRD. Their interests are consistent with the product offered in and around the area and they have above average income and education. Their American counterparts do not tend to travel outside of the US and consequently are not a target market.
- Canadian and American snowmobilers are affluent winter enthusiasts and are often also interested in fishing, creating an opportunity for seasonal cross promotions.
- Fishing tourists are also a potential target market for the northern SLRD (sturgeon as well as river/lake fishing) although care should be taken when considering the American fishing market since many of these visitors tend not to travel outside of the United States. BC residents and Canadian anglers may yield stronger returns from promotional investments.
- Heritage activities are of interest to many travellers and Lillooet's role in the Gold Rush as Mile '0' and Golden Mile of History will be of interest to travellers motivated by heritage as will the Bridge River Valley's gold history/heritage – partnerships with Historic Hat Creek Ranch just outside of Cache Creek and others along the Gold Rush Trail can be forged to create a touring route.
- A large proportion of American festivals/events travelers and history/heritage travelers do not travel outside of the United States and while the northern SLRD has experiences in both these categories, a BC/Canadian focus is recommended if this segment is targeted.

- The Cariboo Chilcotin Coast tourism region has successfully been growing its profile as a geo-caching destination and this travel sector could also be considered throughout the entire northern SLRD.
- While there is no specific research available on travellers motivated by or participating in dirt biking and/or all-terrain vehicles/quads, anecdotally workshop participants in the Bridge River Valley planning workshop noted that this is a component of current visitation that could be grown.
- There is growing interest in authentic Aboriginal cultural experiences and partnerships with local St'át'imc communities and other Aboriginal cultural experiences in region should be considered. Lillooet currently features one market-ready experience - Xwísten Experience Tours. Sekw'el'was Experience Tours – botanical walks/storytelling is in development with plans to be [market-ready](#) in the near future. As well, the Kaohum shuttle and tours of the Ti'it'q'et pithouse are available – these experiences should be profiled to target markets both during the trip—planning phase and while en route.
- Wine tourism is a growth sector and while there isn't sufficient numbers of wineries in the area to create a 'wine destination', proximity to the Okanagan and Fort Berens' recent accolades can be leveraged to extend the wine touring circle of some travellers to include Lillooet and Area B.

## 5.0 Touring Routes Development

The completion and review of the tourism asset inventory accompanied by the assessment of highest return target markets, offers preliminary insight into possible touring routes throughout the northern SLRD. A review of best practices in the development of touring routes conducted by Cadence Strategies for Destination BC and the Gold Rush Trail Management Committee in 2013 concluded:

**“...the foundation of a successful touring route is a collection of attractions that appeal to visitors and the interpretation of these attractions to convey a theme, meaning and relationship.”**

As well, the development of possible touring routes should leverage the current provincial and regional context for destination development and marketing as described below.

### 5.1 The Provincial Context – Destination BC

Destination BC is an industry-led Crown corporation that works collaboratively with tourism stakeholders across the province in coordinating marketing at the international, provincial, regional and local levels. Destination BC has been mandated to fulfill several key marketing and leadership responsibilities critical to the long-term, sustainable growth of the provincial tourism industry.



Over the next three years, Destination BC will be focused on three important goals for growth, as identified within their new Corporate Strategy<sup>2</sup>:

- Secure the highest Net Promoter Score in North America
- Lead Canada in growth of overnight visitor expenditures
- Build a collaborative, insight-driven, results-focused team

In addition, the corporate strategy identifies five iconic experiences that showcase BC in a compelling way: Canadian Rockies, Rainforests, Cities in Wilderness, Ocean Coast and Skiing.

A few key Destination BC initiatives that may impact the northern SLRD area include:

- Launch of BC's new tourism brand creative and guidelines. There is significant effort being placed on industry leveraging and amplifying the BC destination brand with the tagline Super, Natural British Columbia<sup>3</sup>
- Launch of new application-based provincial Co-operative Marketing Partnerships Program<sup>4</sup> which will replace the current Tourism Partners, Community Tourism Opportunities and Experiences BC programs. The new program will be an application-based program of which the Lower Columbia can apply directly to Destination BC for funding
- Launch of EQ program for tourism operators. Register with Destination BC: [tourismresearch@DestinationBC.ca](mailto:tourismresearch@DestinationBC.ca)
- Launch of the new Remarkable Experiences pilot program. The goals of the program are to support businesses over a period of time to: improve their digital and social media marketing skills; increase their Net Promoter Score<sup>5</sup>, and enhance the visitor experience of each individual business, but also the collective experience between businesses
- New Marketing Strategy with a focus on Captivate, Advocate and Generate<sup>6</sup>
  - Captivate: Create an emotional connection with BC in the minds of global consumers. This strategy will drive visitation by fostering an emotional connection between the target audience and British Columbia through alignment around the BC destination brand, inspirational storytelling to passionate audiences and data-driven marketing
  - Advocate: Amplify traveller advocacy about BC. This strategy will drive visitation by amplifying the power of peer to peer recommendations to influence potential travellers to visit BC thereby increasing reach and impact

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<sup>2</sup> Our Corporate Strategy, Destination BC:

<http://www.destinationbc.ca/cmspages/getfile.aspx?guid=55651809-3ab6-4f0e-ba36-9bffb8de7ef9>

<sup>3</sup> New brand guidelines are available: <http://www.destinationbc.ca/getattachment/Resources/british-columbia-tourism-brand/Our-Brand.pdf.aspx>

<sup>4</sup> New program guidelines are available: <http://www.destinationbc.ca/Programs/Regions-Communities-and-Sectors/Destination-BC-Co-op-Marketing-Program.aspx>

<sup>5</sup> Background on the Net Promoter Score is available: <http://www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx>

<sup>6</sup> New strategy is available <http://strategy.destinationbc.ca/our-marketing-strategy/>

- Generate: Lead generation for BC tourism businesses and travel trade. This strategy will increase referrals for tourism business in BC by leveraging the strength of global relationships and technological capabilities
- A strong focus on Destination Development and planning

## 5.2 The Regional Context – Cariboo Chilcotin Coast Tourism

Cariboo Chilcotin Coast Tourism Association is a destination management organization whose mandate is to enhance the regional visitor economy for the benefit of business and communities through destination marketing and management activities. The organization is a non-profit association representing the tourism stakeholders within the region:

### *Cariboo Chilcotin Coast*



Cariboo Chilcotin Coast Tourism Association (CCCTA) is one of five regional destination marketing organizations (RDMO) in BC that are contracted by Destination BC to deliver marketing initiatives on behalf of the region. As part of this contract, each region administers co-operative marketing touring and exploring programs for their respective region. Through the co-op programs, CCCTA is able to offer tourism stakeholders within the region the opportunity to participate in marketing initiatives at reduced costs.

A few key initiatives from CCCTA that may support the development of touring routes through the northern SLRD area include:

- CCCTA will take on a greater role in Destination Development planning and activation for the region moving forward
- Translation of the new provincial tourism brand to the Cariboo Chilcotin Coast region as a destination. This work will include new 'on-brand' asset development such as videos, images and written content
- Alignment to Destination BC marketing strategies of Captivate (10% of effort), Advocate (20% of effort) and Generate (70% of effort)



- Focus on Touring and Exploring markets, including: FIT (Free and Independent Travel) & RV Touring, Motorcycle Touring, Outdoor Adventure, and Visiting Friends and Relatives (VFR) and destination weddings

### **5.3 Possible Touring Routes**

The possible themes or stories that can be considered in Phase Two of the Northern SLRD Touring Routes initiative include:

- Might and Majesty – circle tour from the Lower Mainland through the Fraser Canyon to Lillooet/Area B with possible extensions into Area A if vehicle permits, Pemberton, Whistler and Squamish featuring sightseeing, hiking and cultural/heritage experiences;
- Culinary Delights – circle tour from the Lower Mainland through the Fraser Valley to Lillooet/Area B and Pemberton featuring wineries, farm to table, Farmers Markets, festivals, you-picks etc.
- Farther/Deeper/Higher – passion-themed tours for mountain bikers, hikers, winter backcountry enthusiasts encouraging them to go beyond
- Step Back in Time – Cultural Exploration featuring Aboriginal culture, Gold Rush heritage
- So Close Yet A World Away – Getaways and Escapes
- Anglers' Heaven – a tour of the northern SLRD's best angling
- Dual Sport/Off Road Adventures – motorized off-road adventures
- Others to be defined

### **6.0 Next Steps – Phase Two**

Phase Two of the investigation into the proposed Northern SLRD touring routes is recommended to include:

- Additional engagement with the St'át'imc and community stakeholders should be undertaken to ensure alignment with St'át'imc values and to address community concerns as well as to secure support and generate additional ideas for touring routes
- Primary in-market research to confirm travel motivators, messaging and itinerary experiences
- Detailed touring route development
- Overall feasibility assessment of proposed touring routes including recommendations related to the establishment of a governing body and development of initial strategies for experience development, marketing and promotion



## **Appendix A**

Bridge River Valley/Area A Tourism Asset Inventory – please see accompanying Excel workbook and associated worksheets therein.

## **Appendix B**

District of Lillooet/Area B Tourism Asset Inventory – please see accompanying Excel workbook and associated worksheets therein.