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Regaining the Edge for Adventure Tourism, 2017

A Strategy for Adventure Tourism in British Columbia

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Executive Summary

Adventure tourism representatives from nineteen diverse organizations are very pleased to present this first-ever **Adventure Tourism Strategy for British Columbia**. This *Adventure Tourism Strategy* will be a guide for the responsible and collaborative development of adventure tourism in BC in the coming years.

Adventure tourism has grown to become one of the BC's most exciting economic sectors, filled with development opportunities that provide diverse benefits to communities. The adventure travel visitor economy supports over **2,200 businesses** in British Columbia – mostly small and medium enterprises – which generate in excess of **\$2 billion in annual income** in every corner of the province.

The **goal of BC's adventure tourism sector** is to have strong alignment and collaboration among adventure tourism organizations, and to work with government, the public and key stakeholders to create world-class visitor experiences and robust rural economies.

The *Adventure Tourism Strategy* reflects the recent and precedential agreement among 18 BC-based adventure tourism organizations to **collaborate on a set of shared priorities and issues**. These organizations **commit to working together and with external partners** in a constructive and collaborative manner to achieve shared interests.

This *Adventure Tourism Strategy Summary Report* describes the strategic actions that must be taken in order for a thriving adventure tourism sector to realize its full range of potential benefits in our province. Information on adventure tourism characteristics and the current situation is provided for context. These actions are: (i.) **“Levelling the Playing Field for Adventure Tourism,”** (ii.) **“Enhance and Diversify the Economic and Employment Base and (iii.) “Working Together for Adventure Tourism in BC.”**

The following organizations are partners in the development of this *Adventure Tourism Strategy* for BC:

Figure 1: BC Adventure Tourism Strategy Partners

<ul style="list-style-type: none">● Association of Canadian Mountain Guides● Backcountry Lodges of BC Association● BC Commercial Snowmobile Operators Association● BC Fishing Resorts and Outfitters Association● BC Ocean Boating Tourism Association (Ahoy BC)● BC River Outfitters Association● Boating BC● Canada West Ski Areas Association● Canadian Ski Guides Association	<ul style="list-style-type: none">● Commercial Bear Viewing Association of BC● Guide Outfitters Association of BC● HeliCat Canada● Western Canada Mountain Bike Tourism Association● Sport Fishing Institute of BC● Sea Kayak Guides Alliance of BC● Tourism Industry Association of BC● Wilderness Tourism Association of BC● Aboriginal Tourism Association of BC
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These contributing partners in adventure tourism are committed to working collaboratively with other stakeholders such as the provincial and federal governments, First Nation communities, public recreation groups and resource industries to refine and implement this strategy.

1. Introduction to Adventure Tourism in BC

When future and potential travellers research British Columbia, they are treated to meticulously curated visual displays that present our province at its very best. They see iconic imagery of visitors exploring the crystal-clear waters of the Inside Passage in **sea kayaks**, or accessing awe-inspiring mountain ranges via **helicopters**, **snowcats**, **snowmobiles**, and **skis**. They see people **ski touring** from the comfort of remote mountain lodges, **fly-fishing** in pristine streams and waters, **alpine skiing** at some of the best resorts in the world, and **mountain biking** along thousands of kilometres of world-class single track through lush rainforest and flowing grasslands.

When travellers research BC, they see the place that boasts the deepest collection of the world's most remarkable adventure experiences.

Adventure tourism is a cornerstone of the British Columbia experience and features prominently in the destination marketing campaigns that drive our \$15 billion tourism sector. We are beginning to realize its potential through BC's brand, Super Natural British Columbia™, which is globally recognized and has been very successful in shining a spotlight on authentic, immersive and transformative adventure experiences.

However, **significant barriers to adventure tourism growth and viability have remained** unaddressed for years – decades in some cases – and have increased in both severity and complexity in many cases. The individual and collective partners in our tourism sector have attempted to address these barriers with limited success.

These barriers are primarily related to how adventure tourism operates within the current decision-making framework in BC with regards to land and resources. In short, current practices **do not consider the sector's needs, rights, and responsibilities on par with other resource sectors.**

The recent **explosive growth in mechanized and non-mechanized public recreation** has also placed significant new pressures on our land base. This context **does not consider the fundamental operating needs of businesses** that require access to high quality nature-based experiences, **and there are inadequate supports to manage the increased impact on operating areas by public users** who rightfully seek their own remarkable experiences.

It is apparent that the adventure tourism sector in BC needs an overarching strategy if it is to move ahead, or at least stay competitive with other jurisdictions. It is for this reason that 18 adventure tourism sectors came together in an unprecedented collaborative effort to develop BC's first *Adventure Tourism Strategy*.



Adventure tourism in BC developed rapidly in the 1990s and early-mid 2000s as a result of the sector’s efforts to formally organize and plan for success. This was supported by the formation of strong partnerships between industry and government in an effort to grow the sector through initiatives such as the Joint Steering Committee on Adventure Tourism (JSC).

While the sector continues to grow in terms of annual revenues and visitors served, growth opportunities have become increasingly constrained in recent years by a number of factors that undermine business certainty and stability for over 2,200 business operations.

Record-breaking visitor spending in 2015, 2016 and again in 2017 only increases the pressure to act quickly, as these challenges are presenting amidst a significant boom in tourism across BC and Canada. Globally, the UNWTO suggests that there will be a billion more travelers within the next 15 years. We need to be proactive in planning for this influx.

Tourism is one of the key pillars of BC’s current economic success and greater recognition should be given to its growing impact on the provincial economy.

International Context

International competition for the adventure tourism travel market is growing due to many factors: the relatively low barrier to entry, the incorporation of rural / adventure tourism products into more mainstream tourism packages, growing consumer interest, improved safety practices, and adventure-related destination branding (e.g., Norway’s “Powered by Nature”). One of the key pieces of research that informed this *Adventure Tourism Strategy* was the Adventure Tourism Development Index (ATDI) rankings of global adventure tourism destinations (see <http://www.adventureindex.travel>).

Figure 2 ATDI Rankings (2015)

DEVELOPED COUNTRIES			DEVELOPING COUNTRIES		
2015	2011	2010	2015	2011	2010
Switzerland	Switzerland	Switzerland	Czech Republic	Chile	Israel
Iceland	New Zealand	Iceland	Slovak Republic	Czech Republic	Slovak Republic
Germany	Canada	New Zealand	Bulgaria	Slovak Republic	Chile
Norway	Germany	Canada	Estonia	Israel	Estonia
New Zealand	Iceland	Germany	Chile	Estonia	Czech Republic
Austria	Norway	Sweden	Poland	Bulgaria	Bulgaria
Canada	Finland	Ireland	Israel	Slovenia	Slovenia
Finland	Austria	Norway	Slovenia	Poland	Jordan
Sweden	Sweden	Finland	Korea Rep.	Korea Rep.	Romania
France	Japan	Austria	Costa Rica	Hungary	Latvia

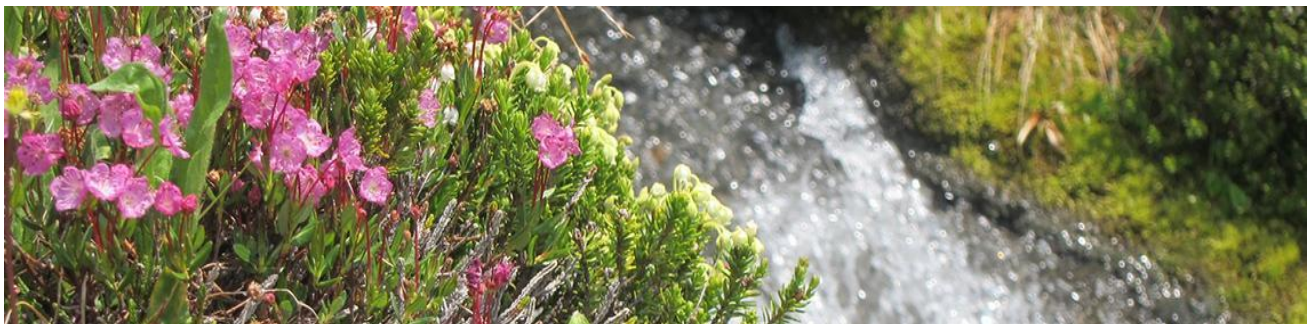
The ATDI Rankings helped the *Adventure Tourism Strategy* partners to identify jurisdictions that display the most supportive, dynamic, and competitive adventure tourism systems in the world, and the key features of these leading destinations’ approaches to supporting adventure tourism. A deeper dive into the ATDI research revealed that Canada dropped from a high of 3rd in 2011 to being ranked 7th in 2015.

Leading adventure tourism jurisdictions in the ATDI were evaluated for practices that could potentially address the key issues identified by *Adventure Tourism Strategy* partner agencies. The jurisdictions that had specific potential solutions included Switzerland, New Zealand, Norway, Sweden, and Australia. Many of these countries, in addition to others in the ATDI rankings, are prioritizing the potential of nature and adventure tourism and developing environmental policies to provide the foundation for adventure travel.

A key finding in the ATDI Report (2015) is that sustainability and profitability of the sector “will depend on a coordinated effort between industry, government, local communities, and project supporters. These actors will need to take a development approach uniquely tailored to the local political, economic, social, and environmental landscape.” (ATDI, 30).

The detailed review of eight competitive adventure tourism destinations resulted in a shortlist of best practices that are common among leading destinations:

- ✓ They provide structural frameworks (agencies, departments, committees, etc.) to support ongoing communication between the adventure tourism industry and its various governments and primary resource sectors;
- ✓ They use a concerted *whole-of-government* approach to support adventure tourism sector needs, and foster an environment that enables policy building and business planning supports to navigate complex land use situations;
- ✓ They focus on maintaining high-quality natural environments in areas of operation;
- ✓ They incorporate sustainability and stewardship principles into the objectives of the adventure tourism sector, and within broader government plans.





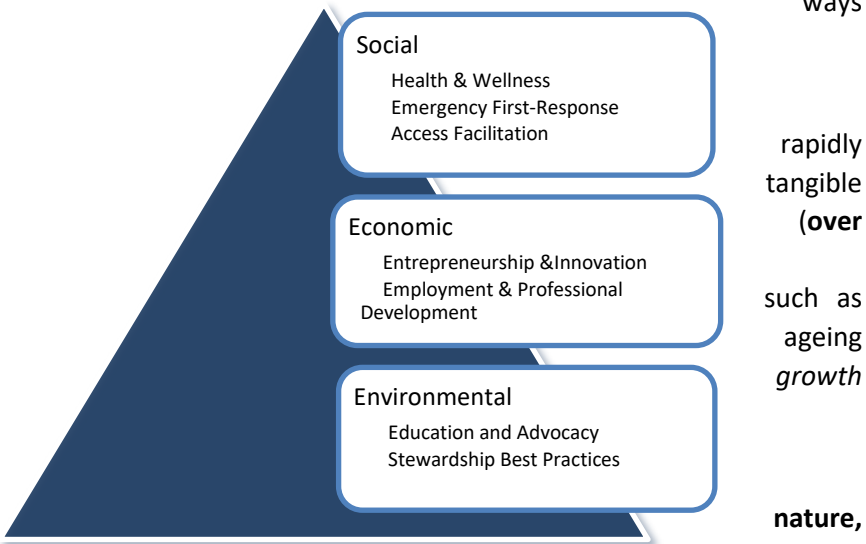
2. The Value and Benefits of Adventure Tourism

Figure 3: Benefits of Adventure Tourism

Adventure tourism **benefits our communities and economy** in ways that are unique among major resource sectors.

These benefits have expanded in recent years, and include measures such as economic value **\$2 billion in direct annual visitor spending**) and intangible factors *facilitating access to nature* in a population, or the *personal* associated with exploration and adventure.

Adventure travel is, by its very challenging, exploratory, and creative. It energizes and invigorates and transforms our visitors, and when developed responsibly, brings significant and meaningful benefits to communities.



Economic Benefits of Adventure Tourism¹

Entrepreneurship and Direct Employment – There are more than 2,200 adventure tourism businesses in British Columbia that directly employ over 21,000 people in managerial occupations, trades or technical positions, and seasonal, entry-level employment.

¹ Destination British Columbia. 2015. The Value of Ski Areas to the British Columbia Economy Phase Two: All Alpine Ski Areas. Available here: http://www.destinationbc.ca/getattachment/Research/Research-by-Activity/Land-based/Value-of-Ski-Areas_Phase-Two_Final.pdf.aspx

Indirect Employment – There are over 11,000 jobs stimulated by adventure tourism in industries such as finance, insurance, real estate, construction, manufacturing, transportation, and various scientific or technical fields;

Total Economic Activity – More than \$2 billion in direct annual visitor revenues is recorded annually, including:

- Over **\$1.3 billion in spending at 46 ski areas** throughout British Columbia, with roughly half being generated by travellers;²
- Over **\$936 million in salt and freshwater fishing** (2011), employing 8,400 people;
- Over **\$190 million in helicopter and cat ski** visitor spending (2015), employing 2,000 people, two-thirds of whom enjoy full-time/permanent work;
- Millions in visitor spending in communities from mountain bike tourism, including Rossland and Golden (\$1 million each), Kamloops (\$2.4 million), and Sea to Sky (>\$10 million);
- And over \$11 million in sea kayaking direct visitor spending (2006), \$15 million in river rafting (2005), and \$15 million in scuba diving (2003).

In total, it is estimated that total revenues of adventure tourism businesses, including downhill ski areas, total in **excess of \$2 billion in direct annual revenues.**

Environmental Benefits of Adventure Tourism

Education - Increasingly, visitors are seeking educational and enriching travel opportunities. Adventure tourism is a key means by which local resident travellers and non-resident visitors learn about our province’s diverse ecosystems and natural environment.

Stewardship – Many businesses are recognized as global leaders in environmental stewardship and social responsibility. These businesses help spread awareness of the ways in which their industry can continue to grow while minimizing any negative impact communities and landscape in which they operate.

Social Benefits of Adventure Tourism

Access – Adventure tourism facilitates access to the outdoors by individuals who otherwise may not be able to participate in such experiences.

Emergency Response – Adventure tourism workers such as fishing guides, heli/cat skiing guides, pilots, and lodge staff are often first responders in emergency situations and provide essential back-country risk management and information services.

General Health and Well-Being – Adventure travel is rejuvenating and transformative as it allows people the opportunity to participate in challenging, inspiring activities in dramatic natural settings, which fosters healthy outdoor lifestyles.



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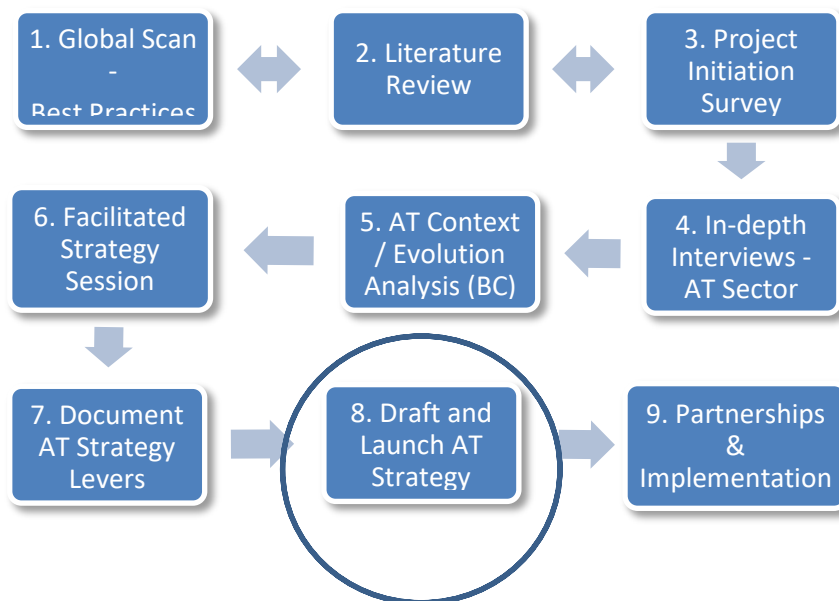


3. Developing BC's Adventure Tourism Strategy

The *Adventure Tourism Strategy* development process involved a number of stages of research and strategic planning among BC's adventure tourism sector representatives.

A global scan of five leading adventure tourism countries and three Canadian provinces was undertaken, in addition to a review of the relevant literature to identify best practices and current operating factors. Adventure tourism sector associations then participated in a Project Initiation Survey to identify their key needs and priorities. This was followed by in-depth telephone interviews with representatives from each of the participating sectors to gain deeper insights into issues and opportunities that could constitute the focus of the *Adventure Tourism Strategy*. The results were then summarized and fully explored by the participating sectors in a full-day facilitated strategy planning session.

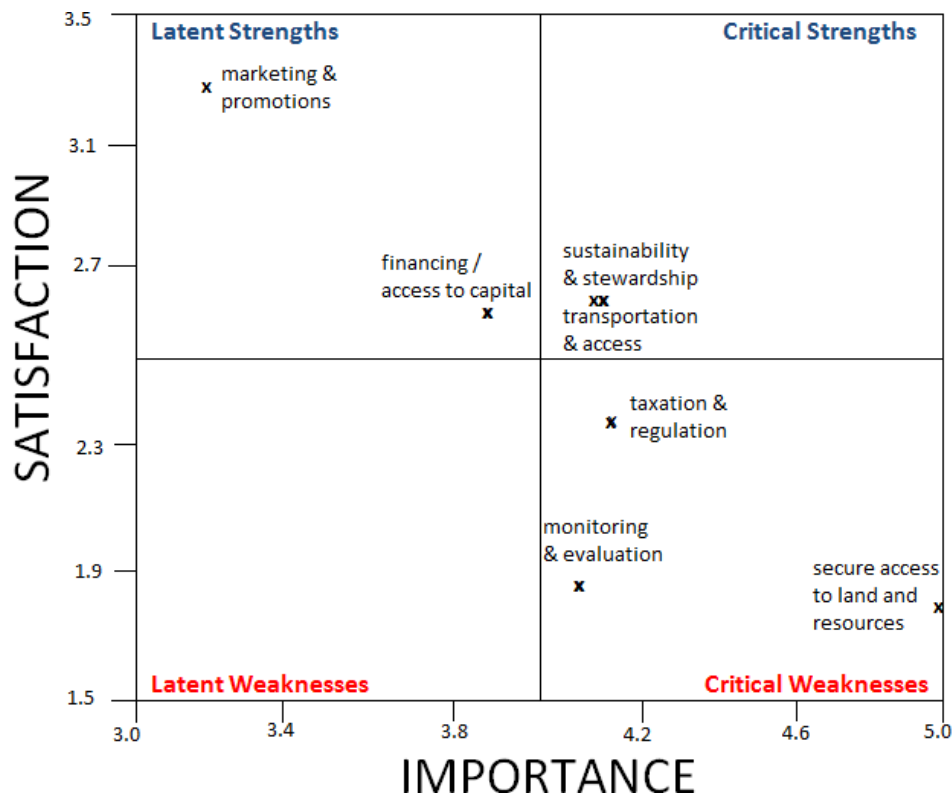
Figure 4: Adventure Tourism Strategy Development Phases





Identifying Core Issues for Adventure Tourism

Figure 5: Importance/Satisfaction Matrix



The most compelling insight from this analysis was the near-consensus regarding the **most critical challenges being supply-side factors** (e.g., land policy, transportation) rather than demand-related factors (i.e. marketing and promotions). A strong finding was the unanimous opinion regarding the **importance of secure access to land and resources** for adventure tourism, alongside corresponding lowest level of satisfaction with current outcomes in this area.

Development areas such as marketing are relative strengths in the adventure tourism system, and were thus not considered to be top priorities for the *Adventure Tourism Strategy*. In addition, issue areas such as labour market development and human resources are significant challenges to adventure tourism growth but are being led by organizations such as go2HR. It is clear, however, that these areas do need continued care and attention.

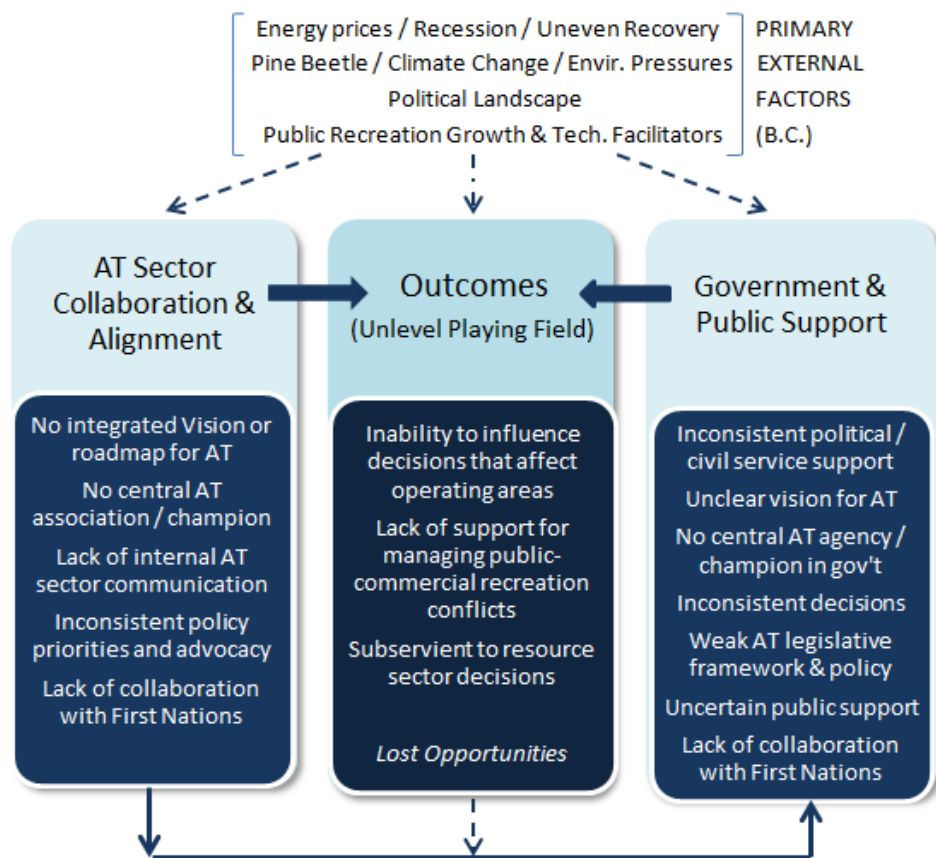
Putting the Pieces Together - A Proposed Logic Model for Adventure Tourism

To further clarify the core issues of adventure tourism businesses and to organize these into a framework for action, a combination of in-depth interviews, joint planning sessions and focused research was undertaken.

This planning identified systemic, structural issues related to how adventure tourism sectors collaborate internally, as well as unclear or inconsistent levels of support by governments, some stakeholder groups, and the public.

As *Figure 6* demonstrates, there are external factors which influence the success of adventure tourism. While these are largely beyond the control of the adventure tourism sector and governments, the two areas that can be controlled are related to “Adventure Tourism Sector Collaboration and Alignment” as well as “Government and Public Support.”

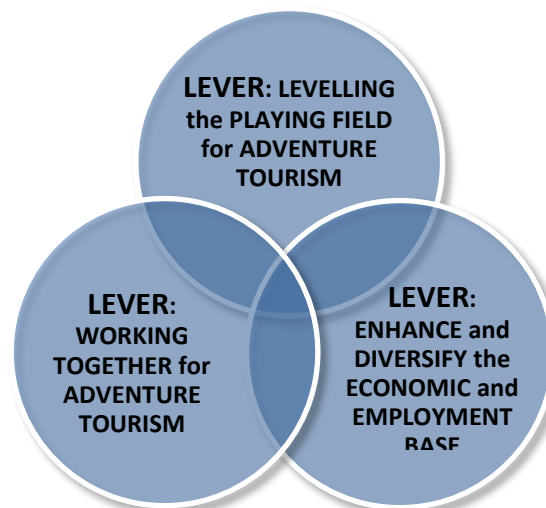
Figure 6: BC Adventure Tourism Logic Model – Identifying “Core Issues”



4. Levers for Adventure Tourism Success

Figure 7: Adventure Tourism Levers for Success

The core issues identified by the participating sectors have been collated and rationalized into a foundation of strategic actions, or “levers”, that must be pulled simultaneously to support adventure tourism growth in BC.



LEVER: Leveling the Playing Field for Adventure Tourism in British Columbia

Like most other resource sectors in BC, adventure tourism businesses are reliant on secure access to land and resources to provide the business certainty required to sustain one of the world’s most valuable visitor economies. Current legislation, policy and tenure directives send the message that tourism operations are considered second-class businesses and subservient to most other resource sectors and users, with fewer rights, fewer protections and less certainty regarding access. There is an opportunity to grow the sector by levelling the playing field for these businesses with respect to other resource users.

A) Improve Relationships with Other Resource Users:

- 1) Strengthen the legal framework for adventure tourism to ensure equality between adventure tourism businesses and other resource users, including but not limited to the modernization of the *Land Act*, *Tourism Act* and other relevant resource legislation with implications for tourism;
- 2) Update the *Adventure Tourism Policy*, including a significant refresh of the land tenure system for adventure tourism operators and harmonization of *Land Act* and *Park Act* tenures for businesses operating in and out of protected areas;
- 3) Ensure that a single branch of government plays a central role in meeting the needs of adventure tourism businesses in the context of land use and resource management;
- 4) Create meaningful agreements/MOUs with external stakeholders to develop and implement a framework for communication, education, land use discussions, and conflict resolution. Possible external stakeholders may include forestry trade associations (COFI; CFPA), First Nations representatives (BC First Nations Summit), mining sector trade associations (AME-BC; MABC), and others.

B) Better Manage Interactions with Public Recreationists

- 1) Develop and implement a system by which to resolve conflicts between adventure tourism businesses and public recreationists in areas of known contention. This should:
 - i) Recognize regional and activity differences;
 - ii) Be built to avoid long-term conflict; and
 - iii) Create outcomes that provide access and opportunities for all interests.
- 2) Prioritize and take action in areas of the province where conflict is leading to uncertainty and business stagnation.
- 3) Take into account existing initiatives that range from legislation to zoning tools, signage, public education, and others as appropriate.
- 4) Set up and implement communications processes and protocols to ensure public awareness of adventure tourism activities, rights, and considerations;
- 5) Advocate for improvements to compliance and enforcement (C&E) on Crown lands relating to adventure tourism and recreation, and explore options for the adventure tourism sector to support the funding of these enhanced C&E activities.

C) Identification of Tourism & Recreation Values in Land Management

- 1) Develop and implement landscape-level, issue- and location-specific tourism and recreation plans for terrestrial and marine regions to resolve ongoing issues with: i) resource industries; ii) public recreation users; iii) First Nations.
- 2) Ensure tourism values have associated legal objectives in landscape level planning initiatives.
- 3) Identify and publicize landscape-level planning successes where adventure tourism has flourished alongside resource industries and public recreation.

D) Identification of Tourism Scenic Areas

- 1) Ensure the BC Government effectively manages visual resources. An evaluation should:
 - i) Take into account significant growth in tourism and thus changes to the value of visual quality in the province;
 - ii) Be tied to and directly associated with the existing and planned adventure tourism tenured activity;
 - iii) Ensure there is clarity and consistency in the management of visual resources and visual quality objectives;
 - iv) Ensure future visual quality objectives are enforceable; and
 - v) Enhance provincial visual resource management staff resources to ensure compliance and enforcement of visual quality objectives.

E) Quality of Environment & Natural Resources

- 1) Encourage adventure tourism businesses to follow best environmental management practices in their operations, and to share those with each other, with public recreation groups, and with the public in general.

- 2) Build tools to help adventure tourism businesses and public recreation groups track and communicate the value of their environmental stewardship practices.



LEVER: Enhance and Diversify the Economic and Employment Base

Adventure tourism provides for local, sustainable, well-paying jobs throughout most of BC. We can do more if government policies and programs are aligned with the needs of the adventure tourism industry. Fluctuations in BC's resource industry economy leaves most communities without a sustainable economic base. Adventure tourism and the public recreation equivalents can help fill the gap by providing sustainable economic opportunities through which local businesses and clubs may establish themselves and prosper.

BC holds considerable natural capital that the world is willing to pay to see if it is properly managed. Adventure tourism, public recreation and resource extraction can coexist and enjoy mutual benefits as long as the needs of all three are equally valued and recognized.

At present, organizations such as Destination BC are doing an excellent job of marketing British Columbia to the world. Ironically, many of the iconic images used in campaigns and promotional materials showcase adventure tourism activities; however, there is a significant public policy gap between what is being marketed to the world, what is happening on the ground, and BC's potential for future growth.

If the adventure tourism sector is to thrive, it is critical that public policy support the growth and sustainability of the sector; a significant and dedicated effort must be made to bridge the gap.

A) Establish Sector-Based Growth Targets for Adventure Tourism in all Regions of the Province

- 1) Evaluate the adventure tourism opportunities in each region of the province and establish growth targets for those sectors with the greatest chance of success.
- 2) Collaboration between government and adventure tourism sectors, public recreation groups and local communities to remove barriers and increase general awareness of potential opportunities.
- 3) Align resource extraction legislation and objectives with tourism and public recreation objectives and policies.
- 4) Set growth targets for adventure tourism sectors and challenge the industry to meet them by:
 - i) Setting employment targets in alignment with industry growth; and
 - ii) Reporting annual growth in economic contribution by region and employment.

B) Enhance Adventure Tourism Management, Compliance & Enforcement

- 1) Create a new single-government organization (e.g. Adventure Tourism Branch) responsible for:
 - i) Supporting the broad needs of adventure tourism by setting aggressive sector growth targets and addressing the sector's unique needs and opportunities;
 - ii) Identifying ways to invest existing and incremental resources in adventure tourism;
 - iii) Being accountable for enhancing adventure tourism business certainty; and
 - iv) Promoting the understanding of, and support for, adventure tourism across ministries.

C) Improve Government and Public Support for Adventure Tourism Commensurate with its Value Relative to Other Resource Users

- 1) Regularly communicate the value, importance, and needs of adventure tourism and related public recreation to elected officials, senior civil servants, and other relevant stakeholders;
- 2) Work with provincial public recreation groups to better coordinate work with stakeholders and government, and to ensure that the rights and interests of both adventure tourism businesses and public recreation groups are considered by government in a coordinated and proactive manner; and
- 3) Work with Destination BC, TIABC and host communities (via DMOs) to develop a comprehensive public relations campaign highlighting the value, contributions, and benefits of adventure tourism throughout the province.





LEVER: Working Together for Adventure Tourism in BC

With many disparate sector organizations working in adventure tourism throughout BC, the sector's strength depends on its internal collaboration, communication and coordination. The process that led to the development of this strategy is a significant step towards a new collaborative approach between the sectors.

Joint Policy Development, Advocacy & Communication

- 1) The coalition of 18 adventure tourism associations will continue to collaborate. The coalition will evaluate options moving forward, depending on government's response to our request for collaboration.
- 2) Expand the Adventure Tourism Coalition to include other adventure tourism sector associations and key provincial public recreation groups to promote collaboration and partnership, as well as unity in working with government.
- 3) The Adventure Tourism Coalition will work with and, where appropriate, partner with organized public recreational interests in the development of adventure tourism and public recreation policy and management practices.

Summary and Next Steps

Developing this *Adventure Tourism Strategy* for British Columbia was a critical first step in identifying the barriers facing the sector, and laying out a pathway for regaining the edge for this transformative part of BC's tourism industry. To date, the work has focused largely on getting the adventure tourism sector's house in order prior to seeking a strategic partnership with the province to address the sector's many challenges and capitalize on its many opportunities. This, in itself, is an exciting development.

But the sectors cannot do this alone. It is our hope and expectation that key ministers and senior government officials will engage with the sectors to further develop, refine and implement the proposed *Adventure Tourism Strategy*. Such a process is critical to bridging the public policy gap that exists between marketing promises and actual delivery on the ground when it comes to experiences for visitors to BC. It is also essential if we are to level the uneven playing field to provide more certainty for adventure tourism businesses moving forward.

Thank you in advance for your support and for your commitment to the sustained growth and future of our adventure tourism sectors. We look forward to your direction on next steps.

Appendix A: BC
Adventure Tourism
Strategy Partners

