

ECO- AND CULTURAL TOURISM: CHARTING A COURSE TO SUCCESS

Sponsored by
'Race Rocks First Nations'
— The Songhees & Esquimalt,
Beecher Bay and Sooke First Nations

Presented by



March 30, 2006

WELCOME AND INTRODUCTIONS

- Outline of today's topics
 - Why Tourism? What can it do for me and my First Nation?
 - Background: A Brief Tourism Primer
 - Real-World FN Tourism: Issues and Examples of Success
 - How to We Get There from Here? A Process to Plan Sustainable, Successful Tourism
 - Finding Tourism Champions
 - Training to Generate Jobs & Careers
 - Identifying Local Opportunities

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WHY PLAN TOURISM DEVELOPMENT?

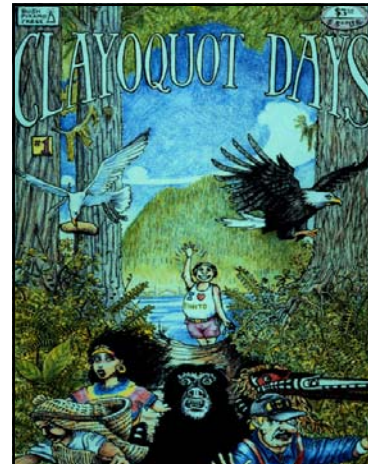
Community Needs

- Amenity values to residents
- Expanded services
- Employment and business options
- Pride in culture
- Control over resources

Community Concerns

- 'Prostitution' of local cultures
- Exclusion of locals from prime areas
- 'McJob' employment
- Outsider control
- Excessive success

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DOING IT RIGHT

- Must respect values, provide benefit to locals
- Must provide quality experience to visitor

Making Adventure Tourism Work for Aboriginal Communities:
Tools and Techniques from Canadian and International Case Studies



D. Bruce Whyte and Dr. Brian P. White
Community Visions Consulting Inc.
Presentation to Canadian Adventure Travel Industry Association
Gros Morne, Newfoundland



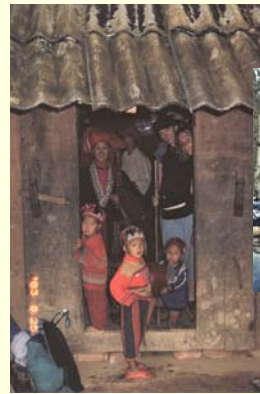
Tourism can serve as a vehicle for social and economic development of remote and rural communities. In Asia or British Columbia, a good place to LIVE makes a good place to VISIT.

Making Adventure Tourism Work for Aboriginal Communities

Building successful tourism enterprises to benefit the community requires the people of the community to take charge and shape the project to suit their own needs. External partners can be essential to success by providing smaller communities with business expertise



Making Adventure Tourism Work for Aboriginal Communities



Both 'hard' and 'soft' infrastructures are essential to keeping tourism benefits within the community.

Making Adventure Tourism Work for Aboriginal Communities

No two community tourism projects are likely to be the same---



--- because locally unique and complex social, political, and cultural factors will tend to be expressed in the choices made to move community tourism forward. We can use this to distinguish our products in the global marketplace.

Making Adventure Tourism Work for Aboriginal Communities

TOURISM MUST BENEFIT LOCALS



It makes good business sense to ensure a fair share of the benefits of tourism stay in the host communities.

Making Adventure Tourism Work for Aboriginal Communities

TOURISM THEORY PRIMER

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- The many faces of tourism
- Status and market trends in the industry
- How to develop tourism so it works now, and offers a long-term future for tomorrow

TOURISM INDUSTRY SECTORS

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ACCOMMODATIONS

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**Lodges, Bungalows
Fishing and Hunting
Cabins
Recreation & Summer
Camps
Hotels, Motels and
Resorts
Bed & Breakfasts
Country Inns
Pensions
Campgrounds**

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FOOD AND BEVERAGE

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**Restaurants
Fast Food
Pubs/Lounges
Clubs/Cabarets
Institutions
Catering
Coffee Shops**

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ADVENTURE & ECO-TOURISM



**Marine
EcoTourism
Parks
Hunting/Fishing
Adventure
Ski Resorts
Golf/Tennis**

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ATTRACTIONS

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**Heritage/Historic
Sites
Archaeological Sites
Museums/Galleries
Parks/Gardens
Amusement/Theme
Parks
Interpretive Centres
Aboriginal/Cultural
Attractions**



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EVENTS AND CONFERENCES

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**Special Events
Meetings,
Conferences,
Conventions
Festivals, Fairs,
Trade Shows**

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TRANSPORTATION

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**Motor Coaches
Air Carriers
Railways
Cruise lines
Car Rentals
Recreation Vehicles
Taxis
Gas stations**

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TRAVEL TRADE

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Travel Agencies
Tour Wholesalers
Tour Operators
Tour Guides

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TOURISM SERVICES

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Tourism Infocentres
Research Services
Advertising
Trade Press
Reservation Services
Consultants

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STATUS OF TOURISM IN BC

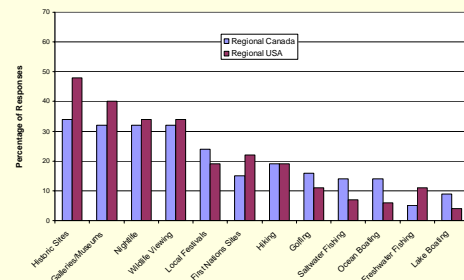
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- 2000 provincial tourism revenues were estimated at \$9.45 billion, up 3.6% over 1999, declined in 2001, up a bit in 2002
- Total overnight visitors are estimated at about 20 million,
- In the last decade the number of tourism jobs in BC has grown by about 30%
- Currently around 113,000 people are employed directly as a result of tourism
- Approximately 234,000 residents of British Columbia are employed in approximately 16,000 tourism-related businesses throughout the province
- Cultural tourism is perhaps the fastest growing sector of North American tourism - and tourism is BC's second largest industry.

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REGIONAL MARKET INTERESTS

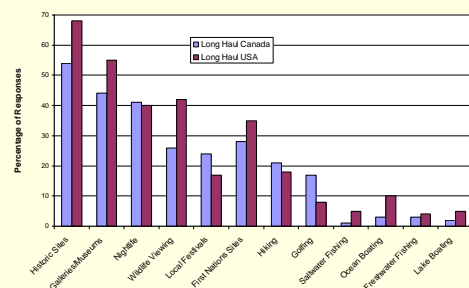
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LONG-HAUL MARKET INTERESTS

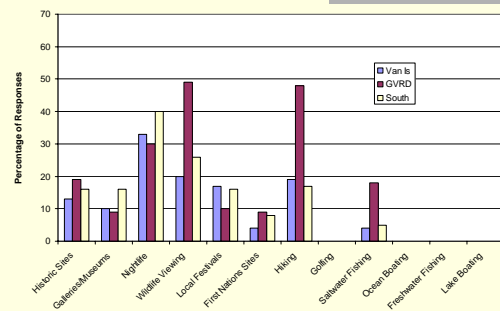
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BC RESIDENT MARKET INTERESTS

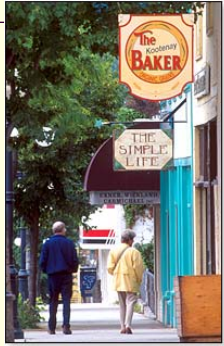
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CULTURAL TOURISTS: A PROFILE

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- Earn more and spend more
- Have higher education levels
- Prefer commercial accommodation
- Shop more
- Tend to belong to older age categories (i.e., aging baby boomers; the 55+ market)
- Stay longer in communities visited

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CHANGES IN TOURISM MARKET

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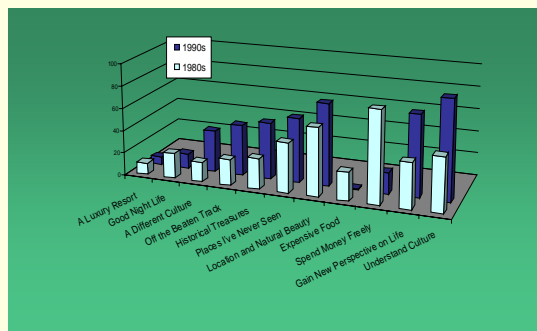
- Emphasis on the Tourist Experience
- Time and Competitiveness
- Demographics: Aging Baby Boomers



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TOURISM & THE NEW ECONOMY

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REALITY CHECK: REAL-WORLD TALES OF FN TOURISM SUCCESS

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- What does a successful FN-owned tourism business look like?
 - What does it take to run an FN-owned tourism business?
 - Are there special issues for FN-owned tourism business?
- Dale and Darlene Hunt, Cluxewe Resort and RV
 - Andrea Sanborn, U'mista Cultural Centre
 - Carol Ann Terreberry, Tsa Kwa Luten Lodge & RV

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CLUXEWE RESORT & RV

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- Owned by Kwakiutl FN
- 127 camp/RV sites @ \$17-25 /night
- 5 beachfront cabins @ \$110-125 /night
- Near operating capacity
- Expansion in progress



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U'MISTA CULTURAL CENTRE

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- Owned by Society controlled by FN
- Major museum facility for potlatch materials
- In operation over 20 years
- Draws about 10,000 visitors a year
- Art & crafts sales
- Major expansion in planning

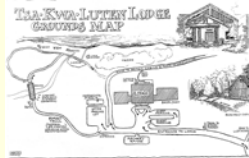


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TSA KWA LUTEN LODGE & RV

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- Owned by company controlled by Cape Mudge FN
- Full-service resort facility with lodge, cabins and RV site
- After initial struggle, now operating at high occupancy
- Expansion project in progress



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THE DEVELOPMENT APPROACH

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1. Set Community Objectives
2. Collect Information on Resources, Products and Markets
3. Consider Opportunities and Constraints
4. Identify Priorities (Strategic)
5. Analyse Feasibility (Tactical)
6. Implement Development Plan
7. Operate and Evaluate

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SET COMMUNITY OBJECTIVES

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- What is the community's vision for this project?
- What outcomes do you want?
- Express social, economic and environmental objectives
- Attach ways to measure how well we do

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COLLECT DATA ON RESOURCES, PRODUCTS AND MARKETS

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- Resources are the inputs we can use to create tourism products
 - Natural and cultural features
 - Built facilities for culture and recreation
 - Governments, agencies and organizations, along with local sources, provide data
 - Mapping is helpful to recognize spatial relationships
- Products are the sets of services and activities
- Markets are the 'end users' who buy our products

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GIS INVENTORY: FACILITIES

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- Identify location and attributes of tourism businesses or support facilities

SOURCE: Campbell River TOS, (MSBTC 2000)

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GIS INVENTORY: FEATURES

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- Identify natural and cultural features which may support or enhance tourism activities

SOURCE: Campbell River TOS, (MSBTC 2000)

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GIS ANALYSIS: MODELLING PRODUCTS

- Capability for Lodge/Resort Development

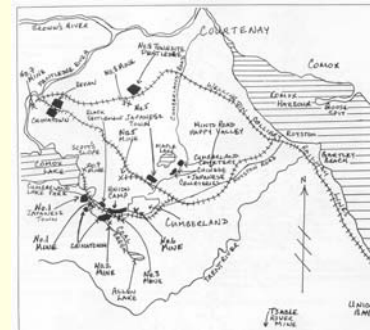


SOURCE: Campbell River TOS, (MSBTC 2000)

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DON'T FORGET LOCAL KNOWLEDGE!

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OUTSTANDING OPPORTUNITIES

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MARKET ANALYSIS (PROJECT EXAMPLE)

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Market Segment	Spends	% Local Spend	Capital Costs	Operating Costs	Return Rate	Number Jobs	Job Quality	Enviro Impact	Social Impact	Present % of Volume	Target % of Volume
Recreationist	Low	Low	Med	Low	Low	Low	Med	Low	Med	25	5
Eco-Tourist	Med	Med	Med	High	Med	Med	Med	Low	Low	25	25
Experienced Eco-Tourist	High	High	Med-High	High	High	Med	Med-High	Low	Low	5	15
Touring Traveller	High	Med	Med-High	High	Med	Med	Med	Med	Low	15	15
Seniors	Med	Med	Med-High	High	Med	Med	Med	Med	Low	5	10
Marine Cruisers	Low	Low	High	High	Low	Low	Med	Med	Low	25	15
Retreat Clients	High	High	Med-High	Med	Med-High	Med	Med-High	Low	Low	0	10

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CONSIDER OPPORTUNITIES AND CONSTRAINTS

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- Drawing on the available resource data, develop a series of proposed products or activities to meet existing and emerging markets (Set up targets)
- Assess the proposed products against how well they meet the community's social, economic and environmental objects (Shoot down targets)

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IDENTIFY PRIORITIES (STRATEGIC)

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- Use analysis just mentioned to inform discussion
- Consult with community and stakeholders
- Responsible project champions make political decisions to set priorities for development
- Structure priorities into strategic plan

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ANALYSE FEASIBILITY (TACTICAL)

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- Conduct detailed business/financial planning to establish proposed scope and structure of development project elements
- Conduct detailed community and stakeholder consultations to identify and address site-specific concerns
- Prepare feasibility analysis of performance to estimate probability of meeting community objectives

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IMPLEMENT DEVELOPMENT PLAN

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- Develop organisational structures and community capacity to implement
- Conduct product development
- Establish marketing approach and distribution channels
- Construct or develop facilities
- Launch product

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OPERATE AND EVALUATE

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- Operate cultural heritage tourism product per business plan
- Evaluate performance against community vision for social, economic and environmental objectives
- Provide ways for community comment and input on operations
- Adjust operations to improve performance

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TOURISM PLANNING PRE-START-UP QUESTIONS

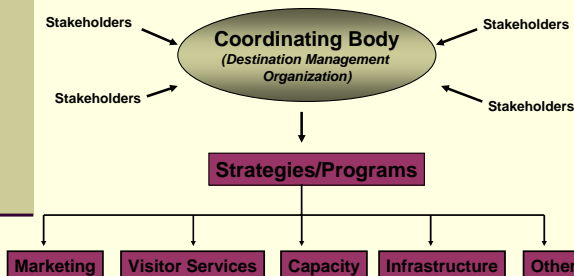
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- Are Communities interested?
- Who's in it (representation & participation)?
- What should it do (mandate/role)?
- Who's in charge (reporting and organisational structure)?

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A COMMUNITY TOURISM PLANNING MODEL

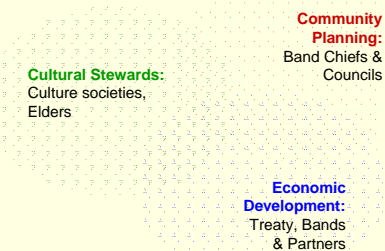
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TOURISM PLANNING MANDATES

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MAKING IT HAPPEN: TRAINING AND CAPACITY-BUILDING

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- What skills do community members need to play meaningful roles in tourism?
- How do community members break the 'glass ceiling' to take on senior positions in management and ownership?
- How can training be tailored to communities' needs – what's available and how do we make it fit?

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CHAMPIONS: KEY PEOPLE ARE CRITICAL TO SUCCESS

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- A look at past projects shows those which succeed are usually those with strong 'champions' within the host community
- 'Champions' muster community energies and ensure projects meet local needs
- Academics and governments now recognize need for 'champions'
- How do we identify and support tourism development champions in the KMT communities?

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TOURISM: PACKAGING THE PRODUCT

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- Is the product willing, ready, and able?
- Do you have a market?
- Do you have access to marketing/advertising?

Movement towards exportability



Ready, Willing, Able

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THANK YOU

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- Thank you for taking part in to this presentation. We hope it has helped spark your interest in the possibilities tourism offers in your Territory.
- Next Steps: Your consultants will be working with Band and Treaty leadership to pick out the leading options for 'Race Rocks' First Nations and map a strategy to get into tourism properly.
- Follow-Up: If you have an idea for a tourism business venture, or are interested in becoming involved personally and professionally – call us!

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