

Feasibility Study and Business Plan

prepared for

Powell River Parks and Wilderness Society (PRPAWS)

and

Community Futures Development Corporation of the Powell River Region

and

Human Resources Development Canada

January, 2000

prepared by

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Readers Note

This report represents a combination of a Feasibility Study and a Business / Action Plan.

From the onset of Synergy's mandate, it was apparent that examining the feasibility and viability of the Sunshine Coast Trail was a critical component of the workload, and preceded the ability to design a Business Plan document that would establish a gameplan for proposed continued implementation of the trail initiative.

The results of the research, lessons learned from role modeling and comprehensive feasibility work were integrated into the Business / Action Plan portion of this document.

This report is divided into three tabbed sections.

1	<i>Executive Summary</i>	Presents only an overview of the highlights of the Feasibility Plan and Business / Action Plan.
2	<i>Feasibility Plan & Research</i>	Represents the results of market research, ecotourism industry research, ecotourist traveler profiling, regional stakeholder interviews, regional infrastructure analysis, jurisdiction and tenure, first nations, and extensive role modeling of other provincial, national and international trails. Further, each area covered herein is accompanied by a analysis of what was learnt from the exercise in direct relation to the Sunshine Coast Trail, and key recommendations and conclusions.
3	<i>Business / Action Plan</i>	The Business / Action Plan encompasses a strategic analysis of the Sunshine Coast Trail's proposed operation, financial forecasting, benefits analysis, strengths and weaknesses, capital and operating costs, proposed ownership and governance, marketing strategies and a Gant Chart Action and Implementation Plan.

1. Executive Summary and Action Plan

The economic impact of outdoor recreational opportunities has been defined as “***the sum total of economic gains to all sectors of the economy.....***”¹. Research shows that trails create jobs, enhance property values, expand local businesses, attract new or relocating businesses, increase tax revenues, decrease local government expenditures and promote community well-being.

1.1 The Role of Tourism in Sustainable Development

Ecotourism, a specialty segment of the larger nature tourism market, is defined as an ***enlightening nature travel experience that contributes to conservation of the ecosystem, while respecting the integrity of host communities....***². Definitions also include nature-based travel, adventure travel, sustainable tourism, cultural tourism and alternative tourism.

Eco-tourism is categorized by groupings which match the activities with the destination and/or season as follows:

<i>Land</i>	Backpacking, mountain climbing, hiking, camping, trail riding.
<i>River</i>	Rafting, canoeing, kayaking.
<i>Winter</i>	Cross country skiing, snowmobiling, ski-touring, dog sledding.
<i>Wildlife</i>	Wildlife viewing, photo safaris.
<i>Cultural</i>	Historic site viewing, educational tours, native villages.

Consideration of tourism, the environment, and concepts of sustainability should encompass four key challenges:

- An understanding of how tourists value and use natural environments;
- Enhancement of the communities dependent on tourism as an industry;
- Identification of the social and environmental impact of tourism; and
- Implementation of systems to manage these impacts.

¹ Ministry of Natural Resources, 1994

² Canadian Environmental Advisory Council, 1992

The linkage between environment as an attraction and economic impact can be substantial. Outdoor recreation activities that is, pursuits that are heavily dependent on natural environments, are important components of many region's tourism industries.³

Ecotourism is one of the fastest growing sectors of the tourism industry in B.C., currently worth \$150 million a year and expanding at the rate of 20% a year. In recent years, B.C. has built up a reputation for being one of the premier sources for outdoor experiences.

1.2 The Link Between Trail Development and Tourism

Trails can be defined as ***“narrow, linear recreational routes normally used for activities such as hiking, bicycling, horseback riding, motorcycling, snowmobiling and cross country skiing.....”***

Tourism can be defined as ***“ the phenomena associated with people travelling overnight for pleasure.....”***⁴

When trails and tourism are brought together through planning and management, trail tourism results.

Around the world there are numerous examples of flourishing trail tourism; the longstanding success of trail tourism in the European Alps; the recent popularity of the Milford Track in New Zealand, the Inca Way in Peru; the trails in Nepal, and the route to Everest being used by over 10,000 tourists annually. In the U.S. the Appalachian Trail has long been popular and there is substantial and growing use of national and provincial park trails by domestic and foreign tourists. The West Coast Trail is so popular that use is restricted, fees are charged and an alternative trail has been provided to cater to the demand. In Ontario, the Bruce Trail, in particular, is a tourist attraction and the Lake Ontario Waterfront Trail is becoming one.

The primary goals are to develop a trail experience that:

³ Linking Tourism, the Environment, and Concepts of Sustainability, Stephen F. McCool

⁴ Trails and Tourism: An Overview, John Marsh, Trent University

- Captures the essence of the surrounding landscape and setting and is distinctive in image and appeal from similar trails in other locations;
- Will attract a wide variety of users from those seeking the ultimate outdoor challenge to those wanting a less demanding experience and even where possible to give disabled visitors an opportunity to experience the trail;
- Will ensure the safety of all visitors;
- Will protect the landscape and work within the development guidelines set by Ministry of Forests;
- Will provide additional services and facilities as necessary to enhance visitors' overall experiences and ensure the trail operates in a cost effective manner; and
- Expands opportunities for the involvement of different private/public sector interests through partnerships and individual efforts that can further promote other tourism related activities within the region.

1.3 Powell River, and the Region's Outdoors / Adventure Tourism Assets and Opportunities

An extensive study was recently (August, 1999) completed by PriceWaterhouseCoopers. Certain brief and select highlights regarding tourism visitor flow, outdoors adventure tourism data and tourism infrastructure are included herein.

**What do these findings reveal about Powell River
in relation to the Sunshine Coast Trail?**

- The Powell River region is considered by many industry experts as 'an outdoors paradise' that is far from being developed close to its potential.
- Existing hiking venues include not only the Sunshine Coast Trail, but thirty six other hiking and mountain biking trails, the Back Country Trail and the Front Country Trail.
- Marine tourism (both fresh and saltwater) are a prime focus of outdoors tourism activity, with saltwater being the predominant area.
- Water-based tourism far exceeds land-based. Of the 36 tourism operators in the region, only three are land based (biking, hiking services) and another small group

are freshwater (canoeing, etc.). The balance are saltwater (diving, cruising, charters, sailing, houseboats, and others).

- There is an existing infrastructure of accommodations, camping, hospitality and travel services.
- **Visitor traffic to Powell River is 67,000 to 151,000, including commercial and non-tourist traffic. This limited tourist traffic is an identified weaknesses of this project, and is dealt with separately in this report.**
- The Sunshine Coast visitor and resident traffic (2.46 million) corridor, as well as the Vancouver, Vancouver Island, and Washington marketplaces are all viable target markets for the Sunshine Coast Trail. Their proximity to Powell River and their demographics and interest in outdoors adventure tourism clearly identify these as priority marketplaces and accessible through creative, proactive and, in certain instances, 'piggyback' marketing (dealt with separately in this report).

1.4 Dependency and Diversity, and Tourism Multipliers in the Powell River Region

Every region within BC has been analyzed and assigned a series of indices and multipliers to reflect dependency on various economic sectors, the impact of growth (or decline) in any one sector and it's trickle effect onto other areas of a region's economy. ⁵

<i>Indicator</i>	<i>Score</i>	<i>What it Means</i>
Income Dependency for Forestry	34	This show how much the community relies on each of the basic sectors. The Income Dependency is the percentage of basic sector income for the region that is attributable to each basic sector. 34% of all basic employment income in Powell River is derived from forestry and pulp & paper. The norm is '10-15'.
Direct Tourism Ratio	2.38	Ten new tourism jobs will create 23.8 direct and indirect tourism jobs.

⁵

"British Columbia Local Area Dependencies and Impact Ratios, 1996". Ministry of Finance and Corporate Relations, Published May, 1999

1.5 Sunshine Coast Trail Background and Specifications

1.5.1 History

The Sunshine Coast Trail was conceived in 1992 when a handful of outdoor enthusiasts realized that there was a vanishing amount of accessible old growth left on the Upper Sunshine Coast. They formed the Powell River Parks and Wilderness Society (PRPAWS), a registered non-profit charitable society to set aside protected areas linked by corridors, as well as beginning work on the 180 km trail connecting the old growth from Salter Bay to Sarah Point.

Phase 1 of the Sunshine Coast Trail was completed in the fall of 1998 connecting the old growth areas of Mount Troubridge, Smith Range, Confederation Lake and the Gwendoline Hills. PRPAWS has also successfully negotiated a further 4,000 hectares of land contained in two protected areas in the Powell River region; the Inland/Confederation/Haslam area and the Duck Lake area. PRPAWS visualize that eventually a hiker will have the option to hike hut-to-hut or complete a section one day at a time and leave the trail to stay in nearby hotels overnight. Currently, there are three bed and breakfasts, one hut, one hostel, one motel and two restaurants along the route.

Phase 2 is being planned to build more outhouses, picnic tables and campsites, with **Phase 3** including the construction of cabins. With its many access points, the trail offers a choice of difficulty, duration, terrain and activity. and is intended to lay the foundation of a sustainable environment and economy in Powell River for future generations.

1.6 Local Infrastructure In Place to Support the Sunshine Coast Trail ⁶

An analysis of the hospitality sector and goods and service providers in the region has shown that there is a reasonably established infrastructure already in place to service potential trail visitor users, although the quality of accommodations was a limiting factor for the higher end marketplace . These infrastructure organizations include accommodations,

⁶

Information extracted from the Powell River Tourism Study, PriceWaterhouseCoopers for Community Futures Development Corporation of the Powell River Region, August 1999

food and beverage, tour operators, travel service and transportation. It has also been determined that there is room for growth in the more direct service providers (i.e. guiding, outfitting, equipment rentals, etc.).

1.7 Ecotourists - Who Are They and What Are Their Outdoors Adventure Needs and Tastes ?

- **Eco-vacations are a significant growth in the travel trade, worldwide.**
- **There is an increased demand and interest in 'soft adventures'.**
- **Environmental concerns are important in destination selections.**
- **There is a strong growth in education and awareness in eco-travelling.**
- **Walking and, particularly hiking, are the highest priority activities. Hiking is the highest activity preference by 24-37% of eco-travellers interviewed, while 45-60% of experienced ecotravellers prefer hiking.**
- **Ecotravellers are well read (Outdoor Life, National Geographic) and well educated**
- **These ecotravellers are strong joiners, i.e. clubs, organizations, special interest groups.**
- **The age group is broad based - 25 to 54.**
- **Scenery and nature experiences are of paramount importance. A 'natural wilderness' and undisturbed appearance is also of importance.**

Based on the extensive eco-profiling work researched and carried out, it is apparent that the Sunshine Coast Trail appeals to a broad based, economically comfortable, somewhat adventurous group who prefer hiking, nature appreciation and soft adventures. There is a definite 'fit' between the offerings of the Sunshine Coast Trail and the prospective trail users.

1.8 Role Modelling of Long Distance BC Trails (Over 25 km)

What has been learned from the role modelling of established BC Trails ?

Most trails are short distance (5-11 km), and easy hiking.

Purist trail users are in the minority. The 'Baby Boomer' market is a strong user niche.

The majority of hikers using longer distance, more difficult trails are young (25-34), travel in small parties (3-4), and the majority (75%) have some hiking experience.

Soft adventure hiking is the most popular and in most demand, and widens the trail user age group (25-54).

Varied activities, multi-uses and interpretive services / guiding are strong selling features.

Private sector and First Nation contracts are commonly awarded for maintenance, traversing streams and ravines, and facility management.

The Westcoast Trail hosts 10,000 users each year, each paying \$95 in user fees. Visitors come from the Lower Mainland (23%), Vancouver Island (15%), Alberta (19%), Germany (11%) and the U S West Coast (6%).

Internet and word of mouth are the most often quoted information and referral sources.

85% target the trail as their main destination, with few touring the region before or after their trail experience.

Private sector ventures that succeed provide transport, camping facilities, groceries, supplies, hiking supplies and equipment and food. Least successful are other attractions, gift shops and hotels / motels.

Of great importance to hikers is the quality and accuracy of trail information provided, the maintenance of trails and safety.

1.9 Regional Stakeholder Interviews

A spot survey of stakeholders in the Powell River region was conducted with the following results. A sampling of operators in the following categories were selected:

- Hotel and Motels
- Bed and Breakfasts
- Resorts and Marinas
- Cabins and Cottage Rentals
- Campsites
- Commercial Operations
- Transportation Services

1.9.1 Interview Results

- All were familiar with the trail and the ongoing initiative;
- 95% reacted positively when asked their opinion of the trail complex;
- 85% stated their business was improved by the trail and the visitors, but only 15% stated that the trail created more jobs in their companies (this is due to the current low volume of trail users and visitors from outside the region);
- 40% would diversify and expand their businesses as trail usage increases;
- 60% currently market the trail along with their own companies;
- 85% would offer, or do offer special packages to trail users;
- 0% see the trail as 'competition', or that the trail will create competition, or reduce their business;
- benefits accrued to the trail (particularly as it grows in popularity) are: attracting more visitors, more use of existing facilities, attracting new businesses, attracting different age groups and visitors from different origins (i.e. different than current visitor traffic), and the creation of additional infrastructure to service trail users;
- trail management is foreseen as volunteers (20%), paid (25%), government (10%) and the balance as a combination of the preceding;
- 60% stated the trail should not charge user fees;
- Internet marketing, brochures and 'word of mouth' were the most often suggested marketing tools;
- trail funding sources include donations, user fees, taxes, fundraising events, government grants and economic development funds; and
- 45% stated they would 'become involved' in some facets of the trail and its ongoing development.

1.10 Jurisdiction, Tenure, Forestry Issues

The Sunshine Coast Trail traverses 8 jurisdictions in its 180 km trek. Addressing the tenure issue and securing agreements for access and management of the trail is an issue that requires resolution.

For the majority of the trail, jurisdiction is not an insurmountable task, however, there are several key tenure issues that will require resolution. The jurisdictions traversed by this trail

include the following:

- Provincial Crown Forest Land;
- Powell River Regional District Parks;
- Corporation of the District of Powell River Parks and roads;
- BC Ministry of Highways;
- BC Ministry of Environment Lands and Parks and Protected Areas;
- Weyerhaeuser Fee Simple Lands⁷; and
- Pacifica Paper Fee Simple Lands

In addition, the trail also overlays Sliammon First Nation's identified Treaty Settlement Lands.

1.10.1 Provincial Crown Forest Land

Management of the Forest Resources Adjacent to the Trail : Recommendations

- A management agreement must be mediated between the Ministry of Forests (MOF) and the Sunshine Coast Trail Committee. The results of this process should include agreed measures for trail management. It is assumed that the existing forest tenure holders will be represented at the table; however, MOF as the primary representative of the Crown will be negotiating on their behalf. The results of the negotiations for management of the trail will result in appropriate marketing, trail development and management strategies.
- Prior to initiating mediation for the preferred management of the forest resources adjacent to the Sunshine Coast Trail, a data set must be established upon which discussion and strategy development could be built. The data required includes:

⁷

Weyerhaeuser reiterated its position in a Jan 4/00 letter that there are no commitments to maintain buffers along the trail. Further, it is believed that portions of the trail can be relocated into areas already removed from forestry. It is also stated that the buffer zone and ribbon of old growth concepts are unrealistic. Discussions must ensue to permit both forestry and the trail to co-exist without impacting on forestry.

- An accurate inventory and valuation of timber resource values that will be impacted by trail buffering.
- A market assessment of the sensitivities of potential trail users to harvesting activities adjacent to the trail. This could be conducted by telephone and mail-out surveys of existing clients of selected travel trade businesses who offer ecotourism experiences.
- An assessment of the potential revenues to be generated from the Sunshine Coast Trail.
- A discussion paper detailing a spectrum of options for management of the forest resources adjacent to the trail. This would include clear-cut to full buffering.
- An assessment of the total harvesting chances that exist along the trail within the next 25 years.

Tenure Options for the Crown Portion of the Sunshine Coast Trail : Recommendations

The Sunshine Coast Trail Committee and Ministry of Parks need to formalize the following:

- Location of the trail in Provincial Parks;
- Tenure agreements for the trail in Parks;
- Create Signage for the Trail in the Parks, and;
- Create management plans for the trail where it crosses Provincial Parks.

Powell River Regional District Parks : Recommendations

The Sunshine Coast Trail Committee should work with the Regional District to outline a management strategy for the trail in development of Haywire Bay Park.

Municipal Parks and Municipal Lands

The Municipality Planning Department sees the Sunshine Coast Trail as a benefit to Powell River. They request that the Sunshine Coast Trail Committee and PRPAWS give them regular updates on intended plans and activities.

Ministry of Transportation and Highways : Recommendations

The Sunshine Coast Trail Committee meet with the Ministry of Transportation and Highways (MOTH) to address issues such as:

- Alignment of portions of the trail crossing roads and highways administered by MOTH;
- Signage for trail crossings; and,
- Adequate design of parking in marshalling areas.

Private Land Interests : Recommendations

The Sunshine Coast Trail Committee needs to develop a process for dealing with conflicts on Private Property. The alternatives would include:

- Exploring liability issues when marketing a product that crosses private property without formal tenure agreements in place;
- Initiating negotiations with private landholders for informal agreements of use;
- Developing alternate courses of action for private land issues such as planning for purchase of key lots or portions of lots. For example, Lot 4067 is for sale for \$150,000; and
- Incorporating boat trips or water taxis into future planning for the trail at Lois Lake and Powell Lake (This alternative if feasible may be attractive to users of the trail and be a marketing point).

1.11 Marketing and Imaging the Sunshine Coast Trail

A key to sustainability is harmony between the place, the visitor and the host community. A successful strategy is an appropriate mix of culture, heritage, recreation, nature, soft adventure, wildlife viewing and so on. The challenge is to develop opportunities to link the relevant activities and attractions into an integrated experience for ecotourists.

1.11.1 Marketing Strategies for the Sunshine Coast Trail

The marketing strategy developed for the Sunshine Coast Trail, and included in detail in this Business Plan, presents marketing initiatives encompassing the following venues.

- Positioning the Sunshine Coast Trail in the Minds of Tourists
- Printed Materials
- Advertising
- Media Attention
- Multi-Trail Marketing
- Internet and Website
- Public Relations

- Ambassadors
- Personalities
- Endorsements
- Multipliers
- Coat - Tailing Existing Marketing
- Joint Event Packaging
- Multi Use Marketing
- Passport to the Sunshine Coast Trail
- Events
- First Nation / Heritage
- Host a 'Work Party'
- Joint Marketing of ALL Regional Trails

Conclusion : The Need for a Proactive Marketing Organization

The marketing strategies developed and presented herein are diverse and viable, well suited for the Sunshine Coast Trail. That having been said, designing, developing, implementing, following through, and monitoring the effectiveness of these strategies is more than can be asked of strictly a volunteer committee.

It is recommended, and included in the operating budget within this Business Plan, to hire a Marketing Manager, or to enter into a contract with an Outdoors Recreation Marketing Organization, to develop and implement a number of these marketing initiatives. The individual or organization would be assisted by a staff of local volunteers, as well as assistance, as may be available from established regional organizations (Chamber of Commerce, Economic Development, Community Futures, etc.).

1.12 Ownership, Governance, Management, Proposed Organizational Structure and Staffing

Insert chart

1.13 Trail Development : Capital Costs

1.13.1 Phase Two

Upgrading and Campsite Development

A series of upgrades are required along portions of the trail to bring it up to grade. The upgrades include:

- Widening portions of the trail;
- Leveling the surface ;
- Building steps in steeper portions;
- Improving markers; and
- Installing signage and milestones.

In addition, a 10 km portion of the Tin Hat section of the trail needs to be rerouted to improve hiking opportunity. Campsite development will be required for this phase of the project by creating and upgrading 17 campsites as follows.

Each campsite will require:

- ✓ Picnic tables
- ✓ Tent pads (wooden structures to put tents on)
- ✓ Outhouses
- ✓ Water supplies if possible

Following this development, routine maintenance will be undertaken annually.

Budget Phase 2

1. Upgrading Trail System	
a) Labour Crew of 4 @ \$700 per day for 100 days	\$70,000
2. Developing Campsites	
b) Labour Crew of 4 @ \$700/ day, 3 days per site	35,000
c) Materials and costs	50,000
3. Overhead and Operating Expenses	
d) Transportation (Vehicles, Trucks, quads,)	7200
e) Communications, Equipment and Tools	2200
Total	\$169,400

Annual Routine Maintenance for Phase 1	
Crew of 4 @ 700.00 per day 40 days	28,000
Total	28,000

Employment

Phase one of the trail will create 150 person days of labour. This work is generally considered labour. There will be a need for the crew to have basic carpentry skills and be familiar with the operation of power saws. One person on the crew should have supervision and small business coordination skills.

1.13.2 Phase Three

Development of Hut-to-hut Recreation

The next phase in development of the Sunshine Coast Trail is to develop hut-to-hut hiking. The primary costs in this process are the building and maintenance of the cabins.

The intent would be to initially have the huts as self-contained units that are similar to the operations of Confederation Lake or Emma Lake. The primary costs are routine maintenance and clean-up. The goal is to have these facilities developed into staffed facilities with complete amenities.

Budget

1. Building Cabins per cabin	
a) Labour Crew of 4 @ \$700 per day for 16 days	\$11,000
b) Materials	24,000
2. Maintenance annual costs	
b) clean cabins, routine repairs etc	3,000
Subtotal	38,000
Total for all six cabins	228,000

Employment

The labour component for this phase is much more critical. The workers must be skilled carpenters. At least one person on the crew must have construction supervision skills. The total employment for this phase is 340 persondays.

1.14 Proposed Sunshine Coast Trail Revenue Streams

The Organizational Structure Model developed within this Business Plan calls for a 'Revenue Creation Committee' to be established under the guidance of the Finance and Budgeting Committee. This reiterates **the importance of designing, implementing and maintaining dependable revenue streams to assure the fiscal well-being of the initiative.**

It is generally felt that, with a focused, proactive campaign regarding revenue stream creation, the Sunshine Coast Trail will be capable of generating sufficient funds to meet its needs. It is also assumed that cost control and budgeting will remain of prime importance.

The most viable revenue generating activities are depicted in the chart below, and are designated as being targeted towards 'Capital Costs' or 'Operations', or both.

Revenue Generating Activity	Capital Costs	Operations
Labour employment and training subsidies,	x	x
Infrastructure development grants	x	x
Two percent (2%) tourist tax.	x	x
Sale of Sunshine Coast Trail Passports and kits.		x
Cabin Rentals		x
Other Sunshine Coast Trail merchandising.		x
Corporate sponsorships.	x	x
'Tree Planting off the Sunshine Coast Trail'	x	x
Society Membership drives	x	x
Leasing sites along the trail to private enterprises		x
Venture Fundraising programs	X	
Licensing the Sunshine Coast Trail name and logo		x
Donations		X
Casinos, lotteries and raffles	X	x
Interpretive and educational services, guided tours		x

Recommendations

The immediate creation of a permanent or interim Revenue Creation Committee as part of the trail's overall organizational structure. The committee should be comprised of accounting and legal presence, as well as fundraising, marketing and government funding procurement expertise.

Review the budgets and proformas presented herein to better quantify and understand the financial needs of the trail (capital and operating costs).

Carry out discussions on the identified revenue streams and prioritize which venues the committee is most comfortable working to implement.

Work to garner community, government and funding source support from key players who can assist in the realization of each fundraising activity selected.

Assignment of specific responsibilities to committee members, and diligent followup on progress.

1.15 Sunshine Coast Trail Budget and Proformas

Conclusions

The Sunshine Coast Trail can be operated at a marginal cash surplus, but will necessarily rely reasonably heavily on membership fees collected (Founder, Corporate and Personal), labour subsidies for construction and maintenance, labour from a dedicated pool of volunteers, and donated supplies for construction and maintenance.

Taking a conservative stance and perspective, it is not assumed that the revenues generated solely from the activities of the trail (trail use fees, cabin rentals, etc.) will sufficiently cover the capital / construction and operating funding needs of the trail.

Trail use fees sold through Passports / information kits will not be mandatory, nor will all trail users purchase them. Numerous trail access points somewhat undermines the ability to flag and impose user fees on all trail users. Furthermore, it is also worth noting that the cabins proposed for the trail may be competing directly with a number of operating lodges and bed & breakfasts located along the trail. This may even cause difficulties in maintaining the support of the ecotourism / accommodation business community.

Substantial work has been done to design and build the trail to its current status. With a proposed concerted marketing and promotional effort it is conceivable to bring the annual trail user traffic to 4,250 within five years. Attracting users / visitors will be a keynote challenge. The Powell River region has just over 100,000 visitors of all types annually, while the Sunshine Coast Trail currently hosts under 500 users. By contrast, the well established, well known West Coast Trail hosts 10,000 users annually from amongst the two million who visit the west coast of Vancouver Island. This further explains our recommendation to bring a full time Marketing Manager on board from the very onset, working with a reasonable marketing budget.

A review of the various costs and anticipated revenue streams as presented herein indicate that the Sunshine Coast Trail is a viable initiative that shows great promise for the Powell River Region. The key to success will be to muster the support, interest and participation of the various revenue-generating players and components as designed into the Proforma Budget.

Certain other funding avenues such as Tourist Tax, Merchandising, Leasing Sites and Legacies have been omitted from the anticipated fund revenue generating pool. The determination of revenues from these sources is speculative at best. That, however, does not preclude considering these venues in the future.

Assumptions

One Season for the Sunshine Coast Trail's operation represents six calendar months only. Each column in the Proforma Budget represents one half of one season (i.e. first half of Season 1, second half of Season 1, etc.). Therefore, each column represents a three month calendar period. There are no expenditures or overheads anticipated for the six month period of 'off-peak' season of each year.

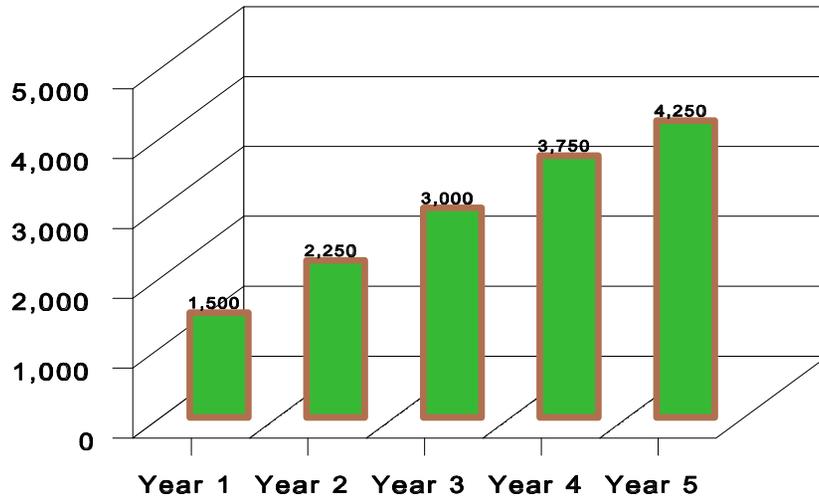
Item	Assumptions
CAPITAL BUDGET	
Upgrading Trail System	\$ 70,000, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , all completed within the first two years of operation.
Developing Campsites	\$ 85,000, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , all completed within the first two years of operation.
Cabins	\$ 35,000 each, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , built at the rate of two cabins per season commencing in year three of operations. By the end of five years, there would be six cabins in operation. Payback is seven years per cabin, based on revenue projections and construction costs.
OPERATING BUDGET	
Executive Director	Part time until year five, at increasing levels of employment. Full employment rate at \$ 40,000/year, or \$ 20,000/ season.
Marketing Director	Full employment at \$ 35,000/year from the beginning, or \$ 17,500 per season.
Part Time Staff	Commences at marginal part time employment, increases to \$ 12,000/year (or \$ 6,000/season) by year five.
Office, Rentals	No overheads anticipated until year two, after which point the expenditures increase gradually and peak at \$ 6,500/year (or \$3,250 per season) in year five.
Communications	Increases from \$ 1,500 / season in year one to \$ 2,500 / season in year five.
Website and Webmaster	Intensive involvement at onset of the project (\$ 30,000/year, or \$ 15,000/season), decreasing to \$ 15,000 / year (or \$ 7,500 per season).
Marketing Expenses	A significant operating cost at \$ 15,000/season in year one, increasing to \$ 20,000 / season in year five. This encompasses the printing and distribution of brochures and info kits, advertising and proactive marketing forays and strategies into target markets.
Travel Expenses	Increases from \$ 1,000/season in year one to \$ 3,000 in year five.
Insurance	\$ 750/season for liability insurance.
Office Equipment,	Increases from \$ 700/season in year one to \$ 1,500 in year five.

Item	Assumptions
Copying	
Legal and Professional	\$ 750/season, assuming volunteered time from professionals.
Transportation and Communications	Specifically trail maintenance costs increasing to \$ 9,000/season in year five, as per <i>Chapter : 'Trail Development : Capital Costs'</i>
Trail (and cabin) Maintenance	Labour costs, as per <i>Chapter : 'Trail Development : Capital Costs'</i> . This cost represents \$ 28,000/season once the trail upgrades and campsites are built (latter half of Season Two). Once the cabin building commences in Season Three, an additional \$ 3,000/cabin/season is added to the maintenance costs. For example, the latter half of Season Five has a Trail Maintenance Expense of \$ 23,000, as represented by \$ 14,000 for trails and \$ 9,000 (6 x \$ 1,500) for cabin maintenance.
<i>Note :</i>	<i>There has been no provision included herein for any possible fees and right of ways payable to landholders and First Nation where the trail traverses these properties.</i>
REVENUES	
Founder Memberships	This category shows the cumulative number of key, early stage corporate membership from major businesses in the region. The revenue from same, at \$ 1,000/season, is shown in 'Founder Membership Fees'.
Corporate Memberships	Highlights the anticipated number of cumulative corporate and professional sponsors / members. The revenues from same, at \$ 200/ season, is shown under 'Corporate Membership Fees'.
Personal Memberships	<p>Highlights the anticipated number of cumulative individual sponsors / members. The revenues from same, at \$ 25/ season, is shown under 'Personal Membership Fees'.</p> <p>In all of the above memberships, there is an attrition factor in that new members will replace those exiting members.</p> <p>Further, the collection of fees is split between each half of each season. For example, thirty corporate members in ½Season 1, @ \$200 = \$6,000, with half collected in the first half of the season, the balance in the second half.</p>
Trail Use Visitor Traffic Projections	Year One 1,500 Year Two 2,250 Year Three 3,000 Year Four 3,750 Year Five 4,250
Number of Cabins	<p>Two cabins are expected to be built every season, commencing in year three. The revenues derived from same appear under 'Cabin Rentals'. The following assumption has been made for revenues;- \$ 55/night/cabin, x 180 days/season x 50% capacity utilization x number of cabins. This represents revenues of \$ 5,000/cabin/season.</p> <p>Each cabin, costing \$ 35,000 to construct, has a seven year payback.</p>

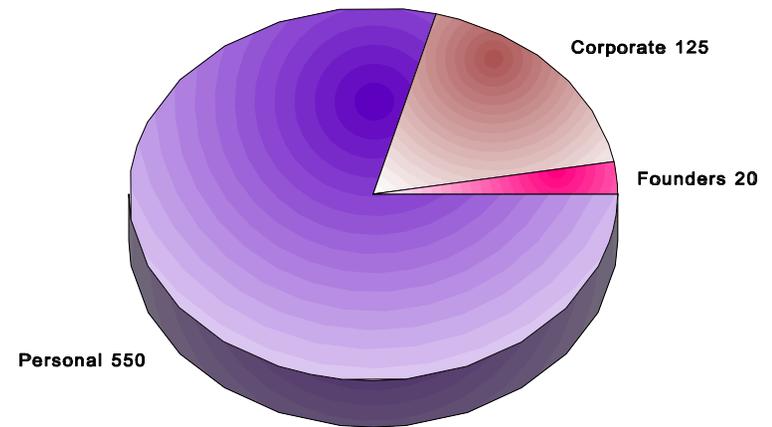
Item	Assumptions
	It is noteworthy to repeat some concern that these cabins will compete with established lodges and bed & breakfasts already existing and operating along the trail, and would discourage the establishment of new private sector operations providing similar facilities.
Donations, Passport Sales	Trail use visitors anticipated x \$30/user x 70% (with numerous access points, not all trail users will be obliged to purchase 'Trail Passport' kits).
Labour Grants and Subsidies	Trail and Campsite construction ;- six jobs x \$15,000 x 50% Cabin construction ;- three jobs x \$15,000 x 50% Training would be integrated into these activities.
Donated Supplies	Estimated at \$5,000/cabin.
Infrastructure Grants	Provision for procurement of same during seasons one and two.
Fundraising	This will be an important funding activity and can represent raffles, special events, casinos, lotteries and any other viable annual activity.
Volunteer (In Kind) Labour	This represents a strategic component of trail building, campsite construction, cabin construction and trail maintenance. All trails throughout the world have a strong network of volunteers to draw upon.

Insert #s

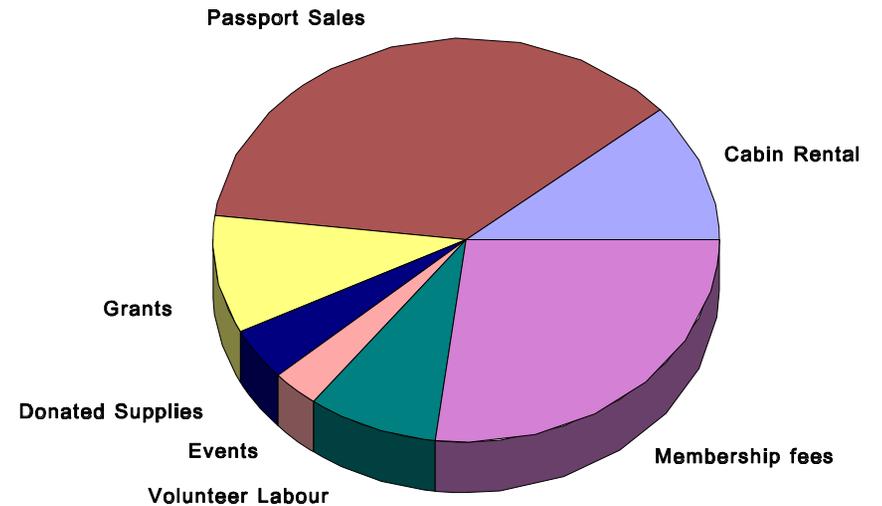
SCT Visitors



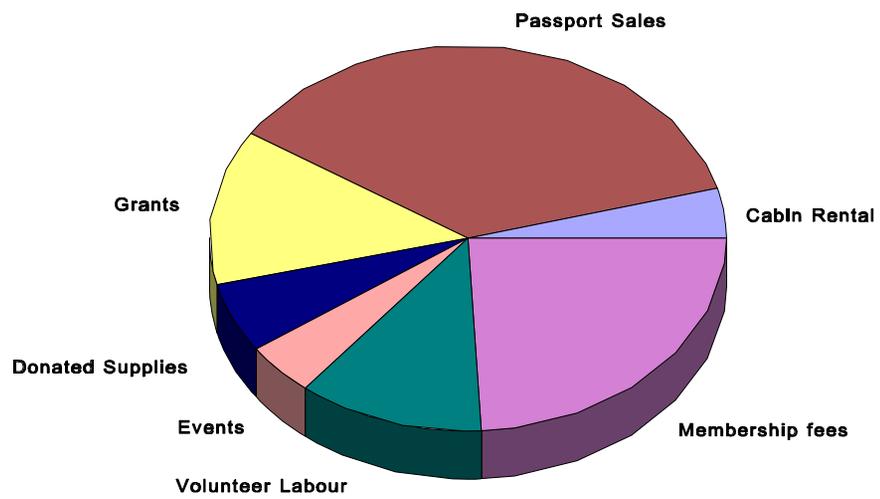
SCT Memberships, Year 5



Revenues, Year 5



Revenues, Year 3



Insert #s

1.16 Sliammon First Nation

Recommendations

Sliammon First Nation should play a key role in future development of the trail. The Sunshine Coast Trail Committee should continue to work with Sliammon. Sliammon should be given the opportunity to take a lead role in the business development and other economic and job initiatives resulting from the trail development.

The Sunshine Coast Trail Committee should develop protocols and tenure agreements with Sliammon First Nation for security of the trail in a post-treaty environment. These agreements should be created before treaty is settled so there is a smooth transition into the new ownership of the trail resources.

There is a strong appeal amongst ecotravellers to participate in, or view Aboriginal culture and history. There exist such opportunities within the scope of the Sunshine Coast Trail and this Native theme can be carried through into the marketing and imaging of the trail.

Opportunities for the Sliammon First Nation to be an active player in the trail include the following opportunities.

- . The Longhouse at Okeover Inlet
- . Operating a fleet of canoe and kayak rentals
- . Guided tours
- . Access to oysters and salmon streams
- . Cultural events
- . Facility rentals at Sliammon Lake or Little Sliammon Lake

1.17 Economic Benefits Analysis

1.17.1 Visitor Traffic to Powell River

Currently, Powell River visitor inflow amounts to 67,000 to 150,000 people annually ⁸. This encompasses commercial and other traffic. The specific percentage of tourist visitors is not precisely known.

1.17.2 Trail Usage

Currently, the Sunshine Coast Trail hosts approximately 500 visitors per year, although there is little actual traffic monitoring carried out.

In setting the 'outside parameters' of the Sunshine Coast Trail, it is viable to use the West Coast Trail as an upper yardstick. The West Coast Trail is of international caliber and reputation, well-established, has historical data on usage and, despite dissimilarities in topographies, location and offerings between it and the Sunshine Coast Trail, it can be a reasonable role model for the Sunshine Coast Trail visitor level targets. The West Coast Trail hosts approximately 10,000 visitors annually.

It is logically anticipated that user traffic increases over a period of time, as the Sunshine Coast Trail becomes better known, more marketing is carried out, awareness building reaches new user groups, word of mouth increases interest and activity, and so on. As such, the potential economic benefits to the region, as depicted below, are shown in chart form, with benefits accrued to anticipated rising levels of trail user traffic (i.e. 1,500/year, 2,500, 5,000, 7,500, 10,000).

Total potential economic benefits for the region were calculated from two vantage points.

- Westland Resource Group's 'North Coast Trail Socio Economic Impact Assessment', (March/96) carried out extensive statistical analysis. The conclusion was that 7,200 trail visitors / year would produce \$ 865,000 in economic benefits for the region. Extrapolated, that represents \$ 120 per visitor / trip.
- Extensive role modeling carried out for this Sunshine Coast Trail Business Plan (see chapter '*Economic Role Modeling*' in this Business Plan) clearly indicates that trail

⁸

Powell River Tourism Report, PriceCoopersWaterhouse, Aug/99

users spending benefits the region at a rate of \$ 49 to \$ 60 / day, with average stays being three days. That represents \$ 147 to \$ 180 per visitor per trip.

- Therefore, the calculation of economic benefits below utilizes a median average of \$ 149 / visitor per trip.

<i>If the Sunshine Coast Trail Hosts.....</i>	<i>.....then the Economic Benefits to the Region can Represent....</i>
1,500 visitors annually	\$ 223,500
2500	\$ 372,500
5000	\$ 745,000
7500	\$ 1,117,500
10000	\$ 1,490,000

1.17.3 Job Creation Potential

Assumptions

The Powell River region has a Tourism Multiplier of 2.38, as assigned by Gary Horne’s 1996 ‘Community Dependency Ratios report. For every direct tourist-related job created, the total impact of tourist jobs created is 2.38. This includes indirect jobs supporting direct tourist employment, trickle down effect of suppliers to suppliers (induced effects), and so on.

Economic role modeling ((see chapter ‘Economic Role Modeling’ in this Business Plan) demonstrates that, for every 1,000 trail visitors / users, there are 3-5 private sector direct tourist jobs created. This includes new ventures (guiding, lodging, equipment rental, facilities, transport, etc.) as well as increased employment in existing businesses to support the increased activity. For purposes of this analysis, we have used the lower index of 3 new direct private sector tourism jobs per 1,000 trail visitors.

The Sunshine Coast Trail itself will call for the creation of several part time and full time jobs, including an Executive Director, a Marketing Manager, staff and trail maintenance

personnel. For purposes of this analysis, we have utilized .5 jobs created for every 1,000 trail users. This applies equally for Administration / Marketing and Trail Maintenance.⁹

Incorporating the above assumptions into a Job Creation Model, the chart below highlights the results.

Potential Job Creation

<i>If the Sunshine Coast Trails Hosts.....</i>	<i>.....then Job Creation in the Region can Represent....</i>
---	--

⁹

Logically, a peak of 5,000 trail users annually would call for 2.5 jobs, i.e. an Executive Director, a Marketing Manager and a part time support staff. Further, 5,000 would call for 5 part time (seasonal) trail maintenance workers, equating to 2.5 full time jobs.

<i>If the Sunshine Coast Trails Hosts.....</i>	<i>.....then Job Creation in the Region can Represent....</i>
1,500 visitors annually	14.28 ¹⁰
2500	23.8
5000	47.6
7500	71.4
10000	95.2

1.17.4 Other Potential Economic Benefits

- Federal and Provincial taxes (GST, PST) will be generated on the economic benefits accrued to the region. For example, 5,000 visitors may benefit the region in the amount of \$ 745,000. This represents another \$ 104,300 in GST and PST for government.
- BC Ferry Corporation and regional air transport carriers will realize higher traffic numbers.

¹⁰

(.5 Administration & Marketing + .5 Trail Maintenance + 3 direct private sector tourist jobs) x 2.38 Tourism Multiplier = 9.52 direct and indirect jobs per 1,000 trail visitors, multiplied by 1.5 (representing 1,500 potential trail users)

1.18 Strengths, Weaknesses and Risks

The following represent the most predominant project strengths and weaknesses of the Sunshine Coast Trail.

Strengths	Weaknesses (and Risks)
The trail is already built, and PRPAWS and its volunteer network have expended years of planning and 'sweat equity' into the creation of the trail. This is not a 'project in planning', but rather an implementation project.	Other major trails have an already established and readily identifiable physical asset to draw on (i.e. Westcoast Trail has Pacific Rim Park, Eastcoast has Appalachian Trail, etc.). The Sunshine Coast Trail does not have a well known coat-tail site. The implication is that awareness-building becomes more of a costly and time-consuming challenge.
Experience has shown that it is far more successful to build a trail and work out issues (i.e. buffers, tenures, rights of way, permits) during the course of the project rather than working to plan and get all parties on side for every conceivable facet of the trail before construction begins. The latter technique has proven, more often than not, to be a 'project ender'.	The volume of visitor traffic (67,000 - 150,000) to Powell River is low in relation to the overall visitor needs of the trail. Current traffic includes commercial, family and other non tourist traffic. The marketing strategies in this Business Plan necessarily target specific user groups, and also how to attract them to visit the region. The current visitor 'numbers' are a prime concern.
Direct and indirect job creation and other economic benefits (<i>please see 'Economic Benefits' chapter in the Business Plan</i>).	Raising capital costs and building and maintaining a revenue stream to support marketing and operations. While this is dealt with in this Business Plan, these fund-raising needs are still deemed a project risk.
Land and wilderness preservation.	The issue of buffer zones on the trail requires resolution. Harvesting across the trail will detract from the trail. No harvesting will cost the tenure holders lost revenues. Clearcutting within key trail areas and visual zones is part of this same issue of co-existing with forestry.
Image building for the region.	Sliammon treaty negotiations and land claims.
Increased visitor traffic.	The trail does not offer easy access to

Strengths	Weaknesses (and Risks)
	areas that can offer winter activities (cross country skiing, snow shoeing). Further, the precipitation levels experienced in the area further limit the trail's 'peak use' to 5-6 months.
Spin off benefits to existing hospitality and tourism goods and service providers.	Weyerhaeuser reiterated its position in a Jan 4/00 letter that there are no commitments to maintain buffers along the trail. Further, it is believed that portions of the trail can be relocated into areas already removed from forestry. It is also stated that the buffer zone and ribbon of old growth concepts are unrealistic. Discussions must ensue to permit both forestry and the trail to co-exist without impacting on forestry.
Infrastructure in place to service trail users.	Currently, inadequate information packages and maps distributed to hikers. No initiation sessions or awareness of rules and standards given to hikers.
Proximity to key markets (Lower Mainland, Vancouver Island, Alberta, U S West Coast).	Lack of information about trail before visitors come to area, i.e. "I have just hiked the West Coast Trail, but if I'd known about this trail before I came, I would have planned to do it."
Growing trend in ecotourism and trail tourism.	Lack of signage and poorly marked access points.
The existence of other long range trails and their experiences act as viable role models.	Reliance on ferry schedules to access area, although the "isolation" feature can also be a selling point for those seeking the wilderness experience.
Strong core group of volunteers.	The sale of other private lands which the trail currently traverses.
High level of acceptance, support and enthusiasm by community and other stakeholders. Cross promotion already in place.	Marketing the trail before it is ready. Currently, the trail is being marketed as virtually complete where, in reality, there are improvements, upgrades and infrastructure development still required. This may cause a 'backlash' from current users disappointed with the trail.

Strengths	Weaknesses (and Risks)
Existing reputation for area among European, especially, German visitors.	
Broad appeal due to levels of ability required to hike the trail; trail can be split into manageable portions, as opposed to the West Coast Trail which is an 'all or nothing' proposition.	

1.19 Action Plan & Timelines Chart

There is little doubt that, after a careful review of the research findings, expert industry input, financial analysis, strengths and weaknesses and potential economic benefits, and an assessment of issues relating to tenure, buffers and jurisdiction, that **the Sunshine Coast Trail is both a viable initiative, well received and supported by the community and First Nation, as well as being an exceptional potential economic stimulus to the area. The Sunshine Coast Trail has the potential to become one of BC's and Canada's premier wilderness trails with a national and international following.**

That having been said, there are a host of issues to be dealt with, some of which can be considered formidable, albeit probably not insurmountable areas of contention.

The following depicts the implementation process with priority deliverables, timelines and milestones necessary to bring the initiative to fruition. The timeline covers a two year period, the first critical timeframe for implementation. The overall two year timeframe is divided into eight quarterly periods, each representing three months. 'Quarter One' should commence as soon as possible, once this Business Plan has been bought into by key players in the process.

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
<u>AWARENESS BUILDING</u>								
Distribute copies of the highlights of this document to those involved in, or could be involved in supporting the trail and implementation.	–							
Information Kiosk at Mall, manned by Eagle and Scott.	–	–						
Media coverage and awareness building.		–	–					
Garner political support (Gordon Wilson).	–	–						
Get Municipality on side and get 'champion' (i.e. Judy Tyabji).	–	–						
Get Sliammon First Nation on side.		–						
Build a network of volunteers, a critical mass of the initiative.		–	–	–				

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
<u>ORGANIZATION</u>								
Establish the new legal, non-profit governing entity. Transfer any rights or agreements PRPAWS has into the new entity.		-	-					
Creation of the Board, including high profile / spokespeople participation.			-					
Develop the Charter and adopt the vision of the initiative.			-	-				
Visioning Committee for 'big picture planning. Assign tasks and responsibilities (as defined in this presentation0.			-	-				
Select an Executive Director. Assign tasks and responsibilities.			-					
Financial and Budget Committee. Assign tasks and responsibilities.				-				
Revenue Generating Action Team. Assign tasks and responsibilities.			-					
Marketing and Public Relations Committee. Assign tasks and responsibilities.			-	-				
Select a Marketing Manager. Assign tasks and responsibilities.			-					
Maintenance Committee. Assign tasks and responsibilities.				-	-			
Safety Committee. Assign tasks and responsibilities.				-	-			
First Nation Committee. Assign tasks and responsibilities.				-	-			
<u>FUNDING AND FUNDRAISING</u>								

Deliverable	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8
Revenue Generating Action Team, and Executive Director and Marketing Manager to review and adopt Proforma Budgets and Revenue Generating Options presented herein and establish priorities.			–					
Assign specific tasks to individuals, or groups of individuals.			–					
Package the Sunshine Coast Trail for regional fundraising.			–	–				
Founder Membership Drive.			–	–	–			
Corporate Membership Drive.			–	–	–			
Discussions with HRDC re funding employment, including startup jobs.		–						
Research any and all government funding envelopes, including Ministry of Tourism Ecotourism Gateway Initiative, Ministry of Community Development, Co operatives and Volunteers, and others.		–	–	–				
Identify and work with any foundations or special interest groups of national and international calibre and secure their certification / endorsement, in-kind assistance and expertise and funding assistance as may be offered.				–	–			
For any government or special interest group opportunities identified above, prepare funding submissions.				–	–			
Events planning and implementation.			–	–				
Personal Membership Drive. Assure media awareness campaign.				–	–	–	–	–
Develop Passport Kits with maps, sites and commercial couponing.				–				
Establish distribution sites throughout the region for the Passports.				–	–			
<u>HUMAN RESOURCES</u>								

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
Define roles of Executive Director and Marketing Manager (roles presented in this document). Discussions with HRDC, Community Futures, etc. re funding their being brought on board at a very early stage of this process.		-						
Define other employment or contracting opportunities and skillsets required re trail maintenance, trail building, campsites and cabin construction.		-	-					
Develop training programs re above. Involve Malaspina College into this process.				-				
Identify and access labour subsidy and training programs, leveraged through several sources.			-	-				
Continue to build the all-important Volunteer Network to involve them in every aspect of this implementation process.					-	-	-	-
<u>JURISDICTIONAL AND PHYSICAL ASSET ISSUES</u>								
Trail Management Agreement with Ministry of Forests and other involved forest tenure holders.		-	-					
Mediation for the preferred management of forest resources adjacent to the trail.		-	-					
Agreement with Ministry of Parks re location of trail within parks, tenure agreements, signage and management plans.		-	-					
Management strategy with Regional District re Haywire Bay Park.		-	-					
Address, with Min of Transport, signage for trail crossings, parking and alignment of portions of trails crossing highways & roads.		-	-					
<u>JURISDICTIONAL AND PHYSICAL ASSET ISSUES.....continued</u>								

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
Develop a process of dealing with conflicts on private property.		–	–					
Trail Management Agreement with Sliammon FN where trail traverses their property.		–	–					
Research the liability issue and exposure re trail users and the Sunshine Coast Trail organization.		–	–					
<u>MARKETING STRATEGIES</u>								
Hire a Marketing Manager (mentioned earlier). Assign tasks and priorities.			–					
Build a directory of trail infrastructure goods and services providers.				–				
Build a detailed inventory of the physical assets of the trail, maps, viewpoints, access points, regional infrastructure available, etc.				–				
Hire a Website designer. Upgrade and expand the site. Use ‘Flash Technology’ to add video clips, music and narration.			–					
Hire a Webmaster to establish links for the site, maintain high profiling and high exposure.					–			
Secure editorial coverage in leading outdoors and travel magazines.				–	–			
Develop the revenue-generating ‘Passports’ for trail users.				–	–			
Identify and coat-tail any and all government marketing initiatives.				–	–	–		
Establish liaison with ecotourism clubs, organizations, travel agent, tour packagers and other lead ‘multipliers’.					–	–		
Liaison with other existing trails for ‘cross referring’ trail users.					–	–		
<u>PHYSICAL TRAIL AND FACILITIES DEVELOPMENT</u>								

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
Carry out Phase Two trail and campsite development.			-	-	-	-	-	-
Trail maintenance crew development.					-	-		
Phase Three cabin designs and costings.								-
Prepare for commencement of cabin construction program.								-
<u>SLIAMMON FIRST NATION</u>								
Discussions re cultural and heritage opportunities and involvement of SFN in longhouse building, canoe and kayak rentals, guided tours, cultural events and facility rentals at Sliammon Lake and/or Little Sliammon Lake.			-	-	-			

Report : Section Two

<i>Feasibility Plan & Research</i>	Represents the results of market research, ecotourism industry research, ecotourist traveller profiling, regional stakeholder interviews, regional infrastructure analysis, jurisdiction and tenure, first nations, and extensive role modelling of other provincial, national and international trails. Further, each area covered herein is accompanied by a analysis of what was learnt from the exercise in direct relation to the Sunshine Coast Trail, and key recommendations and conclusions.
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2.1 Powell River, and the Region's Outdoors / Adventure Tourism Assets and Opportunities

An extensive study was recently (Aug, 1999) completed by PriceWaterhouseCoopers. Certain brief and select highlights regarding tourism visitor flow, outdoors adventure tourism data and tourism infrastructure are included herein.

What do these findings reveal about Powell River in relation to the Sunshine Coast Trail?

- The Powell River region is considered by many industry experts as 'an outdoors paradise' that is far from being developed close to its potential.
- Existing hiking venues include not only the Sunshine Coast Trail, but thirty six other hiking and mountain biking trails, the Back Country Trail and the Front Country Trail.
- Marine tourism (both fresh and saltwater) are a prime focus of outdoors tourism activity, with saltwater being the predominant area.
- Water-based tourism far exceeds land-based. Of the 36 tourism operators in the region, only three are land based (biking, hiking services) and another small group are freshwater (canoeing, etc.). The balance are saltwater (diving, cruising, charters, sailing, houseboats, and others).
- There is an existing infrastructure of accommodations, camping, hospitality and travel services.
- **Visitor traffic to Powell River is 67,000 to 151,000, including commercial and non-tourist traffic. This limited tourist traffic is an identified weaknesses of this project, and is dealt with separately in this report.**
- The Sunshine Coast visitor and resident traffic (2.46 million) corridor, as well as the Vancouver, Vancouver Island, and Washington marketplaces are all viable target markets for the Sunshine Coast Trail. Their proximity to Powell River and their demographics and interest in outdoors adventure tourism clearly identify these as priority marketplaces and accessible through creative, proactive and, in certain instances, 'piggyback' marketing (dealt with separately in this report).

2.1.1 The Powell River Region for Outdoors Tourism ¹¹

¹¹ Powell River Tourism Study, PriceWaterhouseCoopers, August 1999

The Powell River Region extends from Jervis Inlet in the south to Desolation sound in the north. It incorporates the islands of the Malaspina Straight including Texada, Harwood and Savary, and extends east inland to the Pacific Range Mountains and Princess Louisa Inlet. The region consists of a variety of areas that offer differing experiences for the individual. These include:

- The inland marine and park region of Desolation Sound, Okeover Inlet, reaches toward Toba Inlet offering world class sailing, sea kayaking and other marine activities.
- The coast region of Malaspina Peninsula and the Coastal Island offer unique community culture, rugged coastal outlooks, and quality diving and other marine activities.
- The heritage and active community of Powell River Townsite.
- The quality lake, hiking and riding opportunities of Powell Lake and the Island Lakes.
- The exploration and hard adventure opportunities of rock climbing, mountain biking and wildlife viewing within the Inland Highlands.

The primary natural attraction for the Region is Desolation Sound Provincial Marine Park which has international recognition as a high quality sailing and marine cruising area.

Powell River Canoe Route is also well known as an interesting canoe venture incorporating a variety of terrain and selected scenic areas.

As well as the Sunshine Coast Trail, there are 36 trails mapped and recorded for hiking, mountain biking and equestrian use in the Region.

Powell River also has a very good diving capacity with a range of experiences for beginner to advanced.

Powell River Region Tourism Attractions		
Attraction	# of Operators/Facilities	Key Attractions
Parks	6	Desolation Sound
Powell River Forest Canoe Route		57 km. 8 lakes
Sunshine Coast Trail		180 km established Trail
Other Trails	36	Hiking, Mountain Biking
Diving Areas	6 (major), 2 wrecks	Mermaid, Gulfstream, Capilano, Octopus City
Salmon Hatcheries	2	Sliammon, Powell River
Museums and Townsite Heritage Walk		Forestry, Archives
Events and Festivals	34+	Kathaumixw, Blackberry
Golf Courses	1	Myrtle Point
Art and Craft Galleries	4	

Source: PriceWaterhouseCoopers

Marine

From a tourism product perspective, marine-based tour operator services are the predominant product for the Region. Fishing and sailing operators make up half of the tour operators and there are at least eight tourist resorts and marines with ocean outlooks and marine-based activities. While the additional 21 tour operators can be classified under a more broad adventure outdoor category, the majority are also focused on marine activities for diving, kayaking and independent boat rentals. Four operators focus on adventure activities with only one using this business as primary income source.

Accommodations

The region has a high number of facilities that are categorized as resorts and marinas due to their coastal forefront locations, some of which have boat launching and mooring facilities and a range of on-site visitor activities. There are two high quality hotels and a range of mid-level motels, while several hotels are in need of improvement to meet tourist demands.

Tourist Services

The Region is supported by food and beverage services with a range of cafes and restaurants serving regional and ethnic food choices.

Inventory of Powell River Region Tourism Operations (estimated)		
Product	No. Facilities/Operators	Capacity
Tour Operators		
Cruises and Charters (Fishing)	9	8 Vessels
Sailing and Charters (Sightseeing)	10	19 Vessels
Boat/Canoe Rentals	2	
Houseboats	2	
General Nature/Adventure	3	
Diving Tours and Services	4	
Biking Tours and Services	3	
Kayaking and Canoeing	3	26 vessels
Accommodation Units		
Motels	7	159
Full Services Hotels	7	259
Resorts and Marinas	8	57
Bed and Breakfasts	18	36
Hostels	2	
Cabin and Cottage rentals	8	16
Accommodation Sites		
Resorts and Marinas	3	34
Campgrounds	10	356
Forest Recreation Sites	8	72
Travel Services		
Restaurants	29	
Cafes/Bakeries/Snackbars	18	
Fast Food	12	
Inventory of Powell River Region Tourism Operations (estimated)		
Product	No. Facilities/Operators	Capacity

Travel Agents	2	
Tourist Information	1	
Rental Car	1	
Bus	1	
Airline	2	
Ferry	11	
Water Taxis	4	
Foreign Exchange	6	

Source: *Tourism Inventory Listings, Operator Marketing material, BC Tourism Guide 1997, PriceWaterhouseCoopers*

Access

Powell River is serviced by air (30 minutes from Vancouver) and is accessible by road and two ferry trips from Vancouver which takes around 5 hours. Malaspina Coachlines operates a regular bus services from Vancouver to Powell River.

Opportunities

The key resource attractions in the Region that have already been developed include:

- Desolation Sound for sailing, cruising and sea kayaking;
- Coastal outlook for sailing, fishing and diving;
- Recreational fishing
- Forest resources - Sunshine Coast Trail and other hiking trails; and
- Lakes for canoeing, boating and fishing.

Resources with potential include:

- Theme and heritage events and festivals;
- Adventure packages featuring land and water-based multiple activities, including hard adventure;
- Cultural products; and
- Further development and marketing of the Sunshine Coast Trail.
- Desolation Sound/Okeover Inlet located in Desolation Sound Provincial Marine Park offers opportunities for hiking, sea kayaking, marine cruising and diving, mountain biking and limited wildlife viewing.

Other Regional Ecotourism / Outdoors Adventure Assets

- The northern reaches of Desolation Sound and Toba Inlet have potential for development of a wilderness resort featuring wildlife viewing and recreational activities.
- Malaspina Peninsula and Coastal Islands offer hiking, sea kayaking, marine cruising, marine wildlife viewing and diving.
- The community of Lund also offers unique characteristics.
- Malaspina Strait from Powell River to Jervis Inlet and Princess Louisa Inlet has potential for resort development due its positioning near Saltery Bay. The area offers wildlife viewing and is close to the golf course and other services, such as boat launching.
- Powell Lake, Inland Lake and Haslam Lake offer hiking, mountain biking and canoeing as well as wildlife viewing. Haslam Lake offers handicapped access to its trail system.
- The inland lakes of Horshoe, Nanton, Dodd, Windsor and Goat Lake and Lois Lake offer mountain biking, hiking, canoeing (part of Powell River Canoe Route).
- Texada and Lasqueti Islands offer a wide range of activities including coastal hiking, sea kayaking, diving and mountain biking.
- Texada has significant mineral mining activities which may impact its appeal as a tourist destination.

2.1.2 Tourism Activity - B.C. Sunshine Coast and Powell River

In Canada, visitor exports are predicted to grow at 4.2% per year to 2010 with personal travel and tourism anticipated to grow at 2.8% to year 2010. ¹²

In 1998 almost 22 million overnight visitors traveled to B.C. and for the first three months of 1999, overnight travelers to B.C. increased by 20.5% over the previous year.

Overnight Visitors to B.C. - 1998						
<i>Market</i>	<i>Total Revenue (\$million)</i>	<i>% Change 1997/1998</i>	<i>% Total Visitor Revenue</i>	<i>Total Visitor Volume ('000s)</i>	<i>% Change 1997/1998</i>	<i>% of Total Visitor Revenue</i>
B.C.	2380	1.5	27.2	10654	0	48.9
Canada	2659	2.9	30.4	4.747	1.5	21.8
Regional	1.681	3.3	19.2	3.582	1.8	16.5
Long Haul	978	2.2	11.2	1164	0.7	5.4
United States	2167	11.7	24.7	4.779	10.1	21.9
Regional	1009	11.7	11.5	2863	10.1	13.1
Long Haul	1158	11.7	13.2	1916	10.1	8.8
Asia Pacific	821	-12.9	9.4	774	-14.7	3.6
Japan	287	-8.3	3.3	30	-9.7	1.4
Australia	140	6.3	1.6	120	4.8	0.6
Taiwan	110	-7.1	1.3	88	-8.5	0.4
Europe	625	2.2	7.1	623	1.1	2.9
UK	253	8.7	2.9	238	7.1	1.1
Germany, Austria, Switzerland	199	-5.5	2.3	166	-6.9	0.8
TOTAL	8760	2.9	100	21770	1.9	100

Source: Tourism BC

¹² World Travel and Tourism Council

Sunshine Coast

Total non-resident and resident visitation to the Sunshine was approximately 857,441 in 1996 (most recent BC Visitor Study for area). Non-resident visitation comprised 47% with BC resident travelers making up the other 53%. Of non-resident visitation, main markets are Alberta, Washington and Oregon. Long-haul Canada, primarily Ontario, is quite strong, however, long-haul USA and the Asia Pacific is low. The European market is not big, however, this market shows an interest in nature and cultural experiences and therefore offers potential for the Sunshine Coast. Within BC, the Greater Vancouver Regional District provides 15% of the visitors to the Sunshine Coast with the rest of Southern B.C. being the next strongest market.

In 1998 2.46 million passengers traveled the Horseshoe Bay to Langdale route and it could be estimated that 35% of this traffic was from tourism.

Overnight Visitors - Sunshine Coast		
<i>Market origin</i>	<i>Total visitors</i>	<i>% of overall Vancouver/Coast Mountain Region Visitors</i>
Non-resident		
Regional Canada	105753	6
Regional USA	165308	8
Long Haul Canada	60508	6
Long Haul USA	44167	3
Europe	22352	5
Asia Pacific	7731	1
Total non-resident	405819	
BC Residents		
Vancouver Island	71747	4
Greater Vancouver Regional District	278661	15
Northern BC	8327	1
Southern BC	92887	5
Total resident	451622	
Total Visitors	857441	

Source: BC Visitors Study 1997

Powell River

There have not been any recent surveys conducted to indicate visitation within the Powell River Region. PriceWaterhouseCoopers in their 1999 Powell River Tourism Study produced a broad range estimate as follows.

The Visitor Information Centre keeps a record of travelers who visit the Centre, although not all visitors to the region stop at the Information Centre. In 1997 they recorded 14,000 parties (18,000 individuals), but average visitation per year averages between 8,000 and 10,000 parties. This is a small percentage of total visitation to the Sunshine Coast. Accommodation capacity and estimated occupancy shows that in 1998 just over \$3 million in room revenue was reported in the Powell River Regional District, down 12.6% from 1997.

PriceWaterhouseCoopers also analyzed BC Ferry Statistics for the Earls Cove/Saltery Bay and Powell River/Comox routes. Each of these routes indicates a maximum of 374,000 visitors going into the Powell River region in 1998. Based on the 35% tourist rate measured for the Horseshoe Bay/Langdale route, it was assumed that up to 130,000 tourists may be accessing the region via BC Ferries. Pacific Coastal Airlines has thirty two flights from Vancouver to Powell River providing around 21,600 potential seat to Powell River each year.

It was then calculated that total visitation to the Powell River region may extend to between 67,000 to 151,000 per year, indicating a strong tourist market but with scope for development based on under-utilized ferry and accommodation capacity.

Market Potential by Origin

- European markets, predominantly Germany, show a strong level of interest in historic sites, wildlife viewing and First Nation cultural experiences. This market makes up 5.5% of the non-resident market in the region, but shows a strong interest in traveling throughout B.C. to experience a variety of outdoor activities.
- Regional Canada and USA make up two thirds of the non-resident market to the Sunshine Coast. These visitors have a high level of interest in wildlife viewing, local festivals, First Nation cultural events, and hiking.
-
- Long haul USA visitors show interest in galleries, museums, historic sites, First Nation events and wildlife viewing.
- BC, including the Greater Vancouver Regional District, travelers show a high level of interest in wildlife viewing and hiking but a low level of interest in local heritage and cultural products.

- Local Business Reliance on Tourism.
- Out of the 744 businesses in the Powell River Regional District ¹³, 193 are supported by tourism. This shows that over 25% of businesses in the region have a tourism component to their business.

Vision

The PriceWaterhouseCoopers Tourism Study Report shows a number of tourism visions based on interviews with regional businesses, community leaders and government agencies.

Current visions include developing Powell River as:

An eco-friendly outdoor adventure centre providing:

- Outdoor eco-friendly experiences;
- Supply services; and
- Education centres.

A Centre for music and art with:

- Annual festivals;
- Ongoing schools; and
- Performances.

A getaway destination featuring:

- Golfing, fishing, outdoor activities;
- Small conferences;
- Wellness; and
- Arts and crafts.

A jumping off point to the adjoining regions of:

- Desolation Sound;
- Princess Louise Inlet;

¹³ Stats Canada, December 1997

- Backcountry; and
- Savary Island.

Powell River Needs

The PriceWaterhouseCoopers Tourism Study points out that it is essential to recognize the community culture, the economic climate of the Region, the evolution of tourism and tourism organizations in the community, and the desire of community members toward tourism development. To get the most of the people and natural resources of the area, clear identification of the roles and partnerships for coordinated management between the Visitors Bureau, the Chamber of Commerce, tourism business owners, the District of Powell River, Powell River Regional District, Sliammon First Nation, heritage and cultural organizations, recreation groups, environmental groups and educational bodies.

Marketing

Current marketing of Powell River is conducted through the Visitors Bureau and participation in the Vancouver Coast and Mountains Tourism Association, as well as by individual operators and various tourism marketing initiatives through the Municipality. Regionally, Powell River is a key component of the Sunshine Coast tour route and is positioned to benefit from marketing initiatives that promote the Region.

The Sunshine Coast Trail

The PriceWaterhouseCoopers report identifies the trail as offering significant opportunity to the region by providing a draw that will support other nature based tourism opportunities in the Region. Their market analysis for the Powell River Region demonstrated that there is a strong interest in all markets for hiking activities and other nature based activities such as wildlife viewing. Based on the estimate of visitation by market, the local BC market holds potential for use of the trail. Challenges include maintaining the ecological integrity of the trail, ensuring a “natural experience”, and raising the profile of the trail.

The report goes on to observe that Powell River Parks and Wilderness Society, by its proactive marketing initiatives, shows the foresight needed to establish an economic argument for protection of the trail environment. In support of this, there has been discussion on establishing a business case for the trail to create a hut-to-hut system, incorporating accommodation and service packages for users. Opportunities emerging from this initiative includes development of local guiding businesses, development of a First Nation cultural facility by Sliammon First Nation and collective marketing with the West and North Coast Trails.

2.2 Dependency and Diversity, and Tourism Multipliers in the Powell River Region

Every region within BC has been analyzed and assigned a series of indices and multipliers to reflect dependency on various economic sectors, the impact of growth (or decline) in any one sector and it's trickle effect onto other areas of a region's economy. ¹⁴

Without necessarily delving into all the statistical data available, the following represents the key indicators relating to Powell River. The 'bottom line' of this analysis is that **the Sunshine Coast Trail, as it relates to potential tourism develop in the region, can be catalogued as a significant and important development in terms of direct and indirect job creation, and much needed economic diversification.**

<i>Indicator</i>	<i>Score</i>	<i>What it Means</i>
Income Dependency for Forestry	34	This show how much the community relies on each of the basic sectors. The Income Dependency is the percentage of basic sector income for the region that is attributable to each basic sector. 34% of all basic employment income in Powell River is derived from forestry and pulp & paper. The norm is '10-15'.
Income Dependency for Tourism	6	Only 6% of all basic employment income in Powell River is derived from tourism activities. There is room for, and a need for improvement here.
Employment Ratio for Forestry, Paper	1.6	A loss of 10 forestry jobs translates to a loss of 16 direct and indirect jobs. Vice-versa also applies.
Diversity Index	65	Calculated from the income dependencies, this shows the degree to which a community relies on one or a few sectors. Zero indicates total dependency on one sector. Communities generally range from 50 to 75. Powell River, currently at 65, has fallen from 67 dependency since 1995.
Forest Vulnerability	48	When Powell River experiences a downturn in forestry, the area experience greater difficulties than 78% of BC regions who might experience a similar downturn in their area. Powell River is considered within the top 15 (out of 63) highest vulnerable regions dependent on forestry.
Direct Tourism Ratio	2.38	Ten new tourism jobs will create 23.8 direct and indirect tourism jobs.

¹⁴

"British Columbia Local Area Dependencies and Impact Ratios, 1996". Ministry of Finance and Corporate Relations, Published May, 1999

2.3 Sunshine Coast Trail Background and Specifications

2.3.1 History

The Sunshine Coast Trail was conceived in 1992 when a handful of outdoor enthusiasts realized that there was a vanishing amount of accessible old growth left on the Upper Sunshine Coast. They formed the Powell River Parks and Wilderness Society (PRPAWS), a registered non-profit charitable society to set aside protected areas linked by corridors, as well as beginning work on the 180 km trail connecting the old growth from Saltery Bay to Sarah Point.

Approaching this goal one trail at a time, PRPAWS organized groups of volunteer labour to build new trails and connect existing trails.

Grand openings were held for the trails, with public, government and industry involvement and the new trail gained popularity and acceptance with the public.

PRPAWS draws on the talents of mountain bikers, horseback riders, canoeists, kayakers, skiers, climbers, hikers and naturalists.

Due to the area's moderate climate, the opportunity for winter sports such as cross-country skiing and snowmobiling is limited. Granite Lake occasionally gets snow and is generally difficult, but not impossible accessible in winter.

Phase 1 of the Sunshine Coast Trail was completed in the fall of 1998 connecting the old growth areas of Mount Troubridge, Smith Range, Confederation Lake and the Gwendoline Hills. PRPAWS has also successfully negotiated a further 4,000 hectares of land contained in two protected areas in the Powell River region; the Inland/Confederation/Haslam area and the Duck Lake area. PRPAWS visualize that eventually a hiker will have the option to hike hut-to-hut, or complete a section one day at a time and leave the trail to stay in nearby accommodations overnight. Currently, there are three bed and breakfasts, one hut, one hostel, one motel and two restaurants along the route.

Phase 2 is being planned to build more outhouses, picnic tables and campsites, with **Phase 3** including the construction of trail huts. With its many access points, the trail offers a choice of difficulty, duration, terrain and activity. and is intended to lay the foundation of a sustainable environment and economy in Powell River for future generations.

2.3.2 Description

From the start at the Saltery Bay Ferry Terminal, the trail ascends into a stand of Douglas fir and yellow cedar old growth on Mount Troubridge and surrounding Elephant Lakes.

From there, the route follows shore of Lois Lake and the beginning of the Powell Forest Canoe Route. It crosses Eagle River, then follows the crest of the Smith Range through miles of an old growth corridor.

Tin Hat Mountain affords a 360 degree view of over lakes and mountain ranges, including the Rainbows and the Powell Divide.

Fiddlehead Farm in the Haslam Valley is a hostel known for good food and accommodation.

The next substantial stand of old growth is encountered near Confederation Lake where a log cabin has been constructed for public use. The trail then skirts Inland, Powell and Sliammon Lakes and traverses Appleton Canyon down to Toquenatch Creek.

Passing the head of Okeover Inlet, the trail travels through old growth in the Gwendoline Hills and then follows the shoreline of Malaspina Inlet, ending at Sarah Point in Desolation Sound.

2.3.3 Inventory of Assets by Section

Section	Difficulty	Attractions	Accommodations
Section One Sarah Bay - Malaspina Road (0 - 21.3 km)	Moderate to challenging with substantial elevation gains and losses	Hinder Lake The Knob Cochrane Bay Campsite Old Growth Forest Wednesday Lake (swimming and fishing) Manzanita Bluffs Old Growth Forest Veterans Krompocker's Clearing	Feather Cove - no facilities, no fresh water Cochrane Bay - oceanfront, water, no sanitary facilities or tables Wednesday Lake - swimming, wildlife, lake water, no tables Cedar Lodge B&B - couples accommodation
Section Two Malaspina Road to Powell Lake (28.9 km)	Moderate	Old Knarley Maple Grove Rainforest Giant Fir Gibraltar Viewpoint Rievely's Pond Appleton Canyon Bridge Waterfalls Theth Yeth Lake Kayach Bluffs Dogleg Pond Bird viewing Little Sliammon Lake - Swimming & Picnic Scout Mountain Climbing Bluffs Shingle Mill Pub	Fern Creek - picnic site, firepit, no sanitary Plummer Creek - large campsite, creek water, tables Homestead - tables, outhouse, creek water, near road Appleton Creek - creek water and outhouse, tables, campsite uncleared Kokanee Creek - Lakeside, swimming, creek water, no tables Cadet Campsite - unimproved lakeside Little Sliammon - unimproved, good swimming, picnic

Section	Difficulty	Attractions	Accommodations
Section Three Powell Lake Bridge to Fiddlehead Farm (30.9 km)	Moderate with challenging sections	Lakeside walks Swimming Pocket wilderness Old Growth Fishing B&B	Wednesday Point - unimproved lakeside, swimming Haywire Bay Campsite - all facilities, swimming, showers, (reservations) Inland Lake - Swimming and fishing Confederation Lake - cabin (first come/first served) Fiddlehead Farm B&B - reservations need, camping available
Section Four Fiddlehead Farm to Herondell B&B (30.9 km)	Challenging - steep and rough	Mountain top views Sub-alpine with old growth Wildlife Isolated lakes Berry picking	Signage and campsites non-existent - section not recommended without guide
Section Five Eagle River to Sallery Bay (44 km)	Challenging with large elevation gains and rough trail sections	Best vistas on trail Old Growth Sub-alpine Excellent Swimming Berry Picking Lakeside Walk	Last section to be opened. Signage and campsites non-existent - section not recommended without guide

2.4 Powell River Parks and Wilderness Society (PRPAWS)

In 1992 a handful of outdoor enthusiasts realised that there was a vanishing amount of accessible old growth left on the Upper Sunshine Coast. They formed the Powell River Parks and Wilderness Society (PRPAWS), a registered, non-profit, charitable society, to set aside protected areas linked by corridors. Membership grew rapidly in excess of one hundred. The society meets regularly and has an eight member executive committee. It issues newsletters that are distributed by mail. Membership is open to anyone and costs \$7.00 per person and \$10.00 for a family.

The purposes of the society are:

- To establish accessible parks and wilderness areas in the Powell River district, with linking corridors where possible;
- To promote recreation and tourism in these areas through publicity and education;
- To work through appropriate agencies;
- To encourage public participation in the establishment, development, and maintenance of protected areas;
- To promote social comradeship through a common interest in outdoor activities; to stimulate and further interest in activities such as hiking, canoeing, walking and the observation and study of the natural environment; and
- To help protect our natural heritage for this and future generations.

PRPAWS has systematically addressed the purposes of its constitution by adopting goals and working towards them. PRPAWS' achievements to date include:

- Participation in the Protected Areas Strategy (PAS);
- Building the Sunshine Coast Trail, linking these attractions and others;
- Participation at various tables which will result in the designation of Duck, Confederation and Malaspina as Class A Provincial Parks. Some isolated veterans have been declared wildlife trees along the Sunshine Coast Trail;
- Participation in the PriceWaterhouse Study on Tourism in the Powell River area, now a blueprint for community action;
- Current participation in the Sunshine Coast Trail Committee, the Millennium Park Project, and Outdoor Recreation User Groups (ORUG);

- Hosting hikes and advertising through the media;
- Acting as lead proponents in the Millennium Park Project, a green space in the heart of Powell River. Many communities are participating in this historic project, and more are joining.
- Hosting hikes, work parties, grand openings of trails, and potlucks. The annual ORUG potluck allows recreation, tourism, industry and government to come together meet in an informal setting, thereby encouraging a good line of communication;
- Creating a vision of 50, 100 and 200 years down the road when the community has accommodated the inevitable overflow from the Lower Mainland, and Vancouver Island. The Upper Sunshine Coast will be a destination with perhaps the lure of the Grand Canyon or the Tatzenshini. A ribbon of old growth will host the Canoe Route and the Sunshine Coast Trail, a unique example of the ancient temperate rainforest, the northern jungles; and
- Working together with the BOMB Squad, a group of retired gentlemen who build trails and marvels of wooden bridges, and with Greenways, another non-profit society which is building a hiking/biking path that provides access from Powell River to Lund. Many other interest groups are also involved in the planning process and creation of a integrated recreation facility (IRF). It will lay the foundation of a sustainable environment and economy in the Powell River area for future generations.

2.5 Ecotourists - Who Are They and What Are Their Outdoors Adventure Needs and Tastes ?

A recent survey shows that characteristics of the ecotourist can be slotted into two categories: general consumer and experienced ecotourist. While the general consumer is seeking outdoor adventure experiences to a less adventuresome degree, the experienced ecotourist is looking for more specialized activities.

Ecotourist Profile		
Trends	Characteristics	Experience
<p>Significant growth in travel trade</p> <p>Increasing interest in soft adventure</p> <p>Environmental concerns in destination selection</p> <p>Growth in educational tourism</p>	<p><u>Experienced Ecotourist</u></p> <p>Most between 25 and 54 years. Primarily couples. High level of education. Prefer summer travel. 45% spend over \$1500 per person on ecotourism vacation. 50% belong to related clubs. 72% read nature-related magazines.</p>	<p>45% like scenery/nature. Highest rated activities casual walking, hiking/trekking. Multiple activities. Great interest in nature-related and active pursuits. Mid-range accommodation.</p> <p>45% like scenery/nature. Casual walking, hiking/trekking rated high. Multiple activities. Mid-range accommodations.</p>
	<p><u>General Consumer</u></p> <p>Predominantly 25 - 54 years. Couples. Generally well educated. Prefer summer. 38% spend over \$1500 per person. 11% belong to related clubs. 61% read related magazines.</p>	

2.5.1 Ecotourism Activities and Attractions

North American ecotourists are interested in a large range of activities with general consumers prefer hiking and touring, utilizing motel/hotel facilities, while the more experienced ecotourists prefer rafting, canoeing and kayaking over hiking and are more likely to "rough it". A survey of general consumers and experienced ecotourists , based on last trip taken and future trips planned, produced the following results.

2.5.2 Reasons for Ecotourism Trips ¹⁵

General Consumer: Last Trip		General Consumer: Next Trip		Experienced Ecotourist - Next trip	
Relax. getaway	40%	Enjoy scenery	45%	Enjoy scenery	45%
Visit family and friends	31%	New experiences	28%	New experiences	22%
Enjoy scenery/nature	22%	Returning to location	16%	Land activities	16%
New experiences	16%	Cultural attractions	15%	Wildlife viewing	15%
Returning to location	14%	Mountain activities	15%	Mountain activities	14%
Cultural attractions	8%	Educational	14%	Wilderness	11%
Educational	7%	Rest/relax	13%	Isolated areas	11%
		Wilderness	12%	Water activities	11%
		Visit family/friends	11%	Cultural attractions	10%
		Water activities	9%	Educational	10%
		Land activities	8%		

2.5.3 Motivations and Interests of Ecotourists

General Consumer	Experienced Ecotourist
On vacation to view scenery, new experiences, revisit familiar places and culture.	On vacation for scenery, new experiences, land and water activities and wildlife viewing.
Only 11% belong to clubs and organizations such as Sierra Club, Wildlife organizations.	50% belong to clubs and organizations such as Sierra Club and nature organizations.
Two-thirds read adventure/nature publications such as Outdoor Life, National Geographic.	Three-quarters read adventure/nature publications.

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Based on a survey of consumers in seven major U.S. and Canadian cities and mailout survey of past ecotourism clients provided by travel trade and contained in Ecotourism - Nature/Adventure/Culture: Alberta & B.C. Market Demand Assessment, ARA Consulting Group Inc. 1995. Multiple responses were permitted in survey, therefore total percentages will exceed 100%.

2.5.4 Most Popular Activities in Ecotourism

Activity	General Consumer		Experienced Ecotourist	
	Last Trip	Next Trip	Last Trip	Next Trip
Hiking	24%	37%	45%	60%
Touring	24%	20%	10%	11%
Camping	11%	19%	23%	21%
Walking	20%	17%	4%	8%
Boating	13%	17%	50%	69%
Fishing	11%	16%	9%	12%
Local culture	8%	8%	6%	12%
Cycling	4%	8%	18%	25%
Wildlife viewing	5%	7%	14%	15%
Skiing	5%	7%	11%	13%

2.5.5 Accommodation Preferences of Ecotourists

Type of Accommodation	General Consumer	Experienced Ecotourist
Hotel/motel	56%	41%
Tent	17%	58%
Lodge/inn	14%	60%
Cabin	14%	66%
Bed and Breakfast	10%	55%
Friends	6%	1%
RV	5%	2%
Cruise Ship	4%	20%
House or apartment	3%	1%
Ranch	1%	40%
Other	3%	5%

2.5.6 Market Potential for British Columbia

Nature-oriented tour operators in the past have specialized in destinations rather than activities and traditionally, the term ecotourism was linked with exotic destinations such as the Amazon, Costa Rica or Africa with tropical rainforests once believed to be the main focus for ecotourism.

However, B.C. has the natural setting and cultural experiences which are being sought after by ecotourism travelers.

2.5.7 Appeal of B.C. to Ecotourists

Reason	General Consumer	Experienced Ecotourist
Scenery and Nature	51%	48%
View mountains	22%	21%
New experience	21%	15%
Revisiting	23%	7%
See family/friends	12%	0%
Wildlife viewing	8%	18%
Land activities	9%	18%
Water activities	7%	8%
Visit ocean	11%	5%
Cultural activities	5%	9%
Educational	4%	9%
Isolated areas	2%	14%

Outdoor recreation is pursued as a major activity by both B.C. residents and non-resident visitors. A recent survey conducted by the Ministry of Forests summarizes and compares outdoor recreation participation rates in the Lower Mainland, B.C. in general and the U.S.

A wilderness recreation trip was defined in the survey to mean a recreational trip to a roadless, undeveloped natural area that can be reached only by trails, waterways or air. The study concluded that an average of 410,000 adults per year (18 years and over) in B.C. (i.e. 16% of the adult population) took a wilderness trip in B.C. in the period 1993 - 1996. The average number of trips taken was 3.5 and the average length of each trip was 4.4 days, representing a total of about 6.2 million visitor days.¹⁶

A further survey by the Ministry of Environment, Lands and Parks found that an important distinction between tourism in general and outdoor recreation is that many outdoor recreation trips are just for the day - these day users are considered "excursionists" rather than "tourists". B.C. Parks notes that about 87% of provincial park visits are day use and although some day use in parks may be associated with an overnight trip in general, this suggests a considerable amount of outdoor recreation use is just for the day. The survey concluded that 34% of the wilderness trips taken by B.C. residents were just for the day.

The Ministry of Forests reports that recreation use has increased about 35% at managed recreation sites and trails over the last ten years; 18% for sites and 195% for trails. Much of this growth is likely due to an increase in the number of managed sites and developed trails over the period.

Outdoor Recreation Participation By Activity in B.C. (% annual participation)

¹⁶ Forest, Range & Recreation Resource Analysis, Ministry of Forests, 1996

Outdoor Recreation Participation By Activity in B.C. (% annual participation)

Outdoor Activity	Lower Mainland	British Columbia	U.S.
Walking for pleasure	92	-	60
Sightseeing	90	-	51
Beach going	83	78	-
Picnic	70	-	54
Driving for pleasure	77	-	54
Horseback riding	15	-	10
Jogging/running	31	-	29
Swimming (lake, stream, ocean)	61	56	35
Swimming (outdoor pools)	53	-	48
Hiking (day)	43	59	16
Backpacking (overnight)	13	16	5
Camping	47	49	20-31
Fishing	30-52	45	22-37
Hunting	7	10	36-53
Bicycling (on road)	52	-	36
Bicycling (off-road)	30	-	-
Nature study	47	-	13
Wildlife viewing	32-52	-	14
Canoeing/kayaking	24	20-25	9

Sources: Ministry of Forests/B.C. Parks/U.S. Public Area Recreation Visitor Study

Conclusions and Significance of Ecotraveller Profiling

- Eco-vacations are a significant growth in the travel trade, worldwide.
- There is an increased demand and interest in 'soft adventures'.
- Environmental concerns are important in destination selections.
- There is a strong growth in education and awareness in eco-travelling.
- Walking and, particularly hiking, are the highest priority activities. Hiking is the highest activity preference by 24-37% of eco-travellers interviewed, while 45-60% of experienced ecotravellers prefer hiking.
- Ecotravellers are well read (Outdoor Life, National Geographic) and well educated
- These ecotravellers are strong joiners, i.e. clubs, organizations, special interest groups.
- The age group is broad based - 25 to 54.
- Scenery and natural experiences are of paramount importance.

Based on the extensive eco-profiling work researched and carried out, it is apparent that the Sunshine Coast Trail appeals to a broad based, economically comfortable, somewhat adventurous group who prefer hiking, nature appreciation and soft adventures. There is a definite 'fit' between the offerings of the Sunshine Coast Trail and the prospective trail users.

2.6 Role Modelling Other Long Distance Trails

Hiking has always been a popular outdoor activity even before the term “ecotourism” was widely used and hiking trails have been developed in many areas. Examples of well-established, successful trails are:

2.6.1 The Bruce Trail, Southern Ontario

The Bruce Trail, the oldest marked hiking trail in Canada, follows the ridgeline of the Niagara Escarpment in Southern Ontario. It is a single purpose footpath and restrict all other forms of travel. The total trail length of 762 km traverses over travelled road (24.5%), road allowances (7.9%), public land (39%) and private land (27.9%). It is used for recreational and educational purposes by Ontarians and visitors alike. Fourteen educational centres and eight interpretive centres are located on or near the Bruce Trail.

The Bruce Trail Association

The Trail, built and maintained by volunteers, is run by the Bruce Trail Association (BTA), a non-profit organization dedicated to the development and maintenance of over 800 km of main trails and an additional 200 km of side trails, Membership includes avid hikers, naturalists and ecologists from Ontario and all over the world. The BTA has set out five principal objectives as follows:

- To establish and maintain for the public a trailand to establish and maintain similar trails in such other areas as may be determined.
- To establish, maintain and operate the Bruce Trail and such other trails camps, campsites, and other facilities to enable members of the public to resort thereto for purposes of year-round hiking, recreation, physical fitness and study.
- To engage in and promote conservation of wildlife and natural resources.
- To accept donations, gifts, legacies and bequests.
- To acquire, receive, purchase and hold real property.....for the purpose of securing the route of the Bruce Trail and other such trails, trailheads, camps and campsites which may be established, maintained and operated by the BTA.

The BTA is a volunteer charitable organization of about 8,000 members who are responsible for negotiating and securing the route of the public trail. The strength of the Association lies in individual volunteer willingness to dedicate expertise and effort to jobs at hand. The BTA has over 800 active volunteers who contribute an estimated 75,000 hours of work per year, representing in excess of \$1 million worth of volunteer labour. Every

aspect of the BTA involves volunteers; organizing hikes, trail maintenance, newsletter, Club and Association Board of Directors, publicity committees, keeping in touch with landowners, land acquisition and many more essential activities.

A paid staff of five are involved in every aspect of trail management and operations and reply to thousands of mail and phone enquiries annually. The business of the BTA is carried out by a Board made up of 19 elected directors all of whom must be dues-paying volunteer members of the Association.

For the purpose of operating and managing the Trail on a day-to-day basis, it is divided into 9 clubs. Club members manage, improve and re-route the Trail by clearing the path, making improvements to prevent erosion and building or repairing stiles and bridges. They are responsible for area publicity, for organizing hikes and other events and for preparing Club newsletters. They also develop and maintain good relations with the landowners over whose property the Trail crosses.

2.6.2 The East Coast Trail

The East Coast Trail is being developed to run continuously between Cape St. Francis and Cape Race on the Avalon Peninsula, the most easterly extension of North America in Newfoundland. With the assistance of the East Coast Trail Association, volunteer groups from communities along the route are re-opening traditional coastal paths and reconnecting centres of population with abandoned sites to form the route. Many kilometres of trail have already been opened for hikers to enjoy north of St. John's and work is underway to expand the network.

The 340 km of the trail has been divided into six cultural/administrative units called "paths". Each path has its own cultural and geographical character; thereby breaking the trail into manageable units. Paths vary in length from Cape Spear Path which is 23.5 km long and can be hiked in 2 days to the Colony of Avalon Path which is 136 km long and will take 7 - 9 days to hike. In turn, the paths have been subdivided in "walks" and "community links". A walk is a section of the trail between an obvious start and end point and vary in length from 2 - 15 km. A community link is a section of trail which proceeds through a community along a secondary community road; thus providing numerous opportunities for local people to provide accommodation and other services to hikers.

The East Coast Trail Association was formed in 1994 to publicize the trail and its attractions as well as coordinating and overseeing trail clearing work. The association publishes a quarterly newsletter and maintains an Internet site.

Local community volunteer groups are building the trail and the trail is maintained by a custodian program set up by the association. Individual members of the association volunteer to become custodians who periodically check on their section of trail.

2.6.3 Appalachian Trail - Maine to Georgia, U.S.

One of the oldest long distance trails and stretching for 2100 miles, this trail extends from Maine to Georgia and is operated by the Appalachian Trail Conference. It is the premier hiking trail in the U.S. and is set aside for recreational foot travel only offering a range of hiking experiences from easy day use hikes to challenging backcountry treks.

The trail passes through 14 states, 8 national forests, 6 national parks and numerous state and local parks. About 99% of the route is on publicly owned lands and no fee is charged nor is special permission needed to hike anywhere on the trail itself, through in some high use areas registration is required for overnight stay and fees may be charged for use of shelters and other facilities.

The entire trail route is clearly marked with white blazes and a series of three-sided lean-to's or shelters, each spaced about a day's journey apart and is available to all trail users on a first-come, first-served basis. Also, huts and staging areas along the trail offer extended outdoor education and visitor services, including meals, outdoor instruction, maps, trail gear and shelter.

More than 4 million people use some part of the trail annually and about 2,500 attempt to backpack the entire trail in one continuous journey.

The Appalachian Trail Conference was formed in 1925 to support the idea for a continuous footpath along the ridges of the Appalachian Mountains from Maine to Georgia. After accomplishing the initial purpose of completing the footpath in 1937 the Conference's focus then became securing permanent protection of the trail.

There are 31 affiliated organizations that have maintenance responsibilities for specific portions of the trail. These volunteer groups are guided by a 25 member Board of Managers and a small professional staff who coordinate the trail maintenance and management activities of volunteers.

The programs of the Conference are organized under three general categories; trail protection, trail and railway stewardship and public information.

About one half of each year's budget is committed to protection and stewardship of the trail and adjacent resources, with one third going toward information and education.

2.6.4 Great Divide Trail - Rocky Mountain National Parks

The best known trail in Canada, it is found mostly within the Rocky Mountain National Parks, extending from Jasper National Park south through Banff, Yoho and Kootenay National Park. In the last decade an extension has been made connecting the trail to Waterton National Park and the U.S.

It is free to hike the trail, with maintenance being provided primarily by a volunteer trail society. Within the National Parks, the trail links up with several backcountry huts and youth hostel facilities.

2.6.5 The Milford Track, New Zealand

Considered one of the world's best walking trails, the trail runs for 55 km through the Fiordland National Park in New Zealand. Fully equipped accommodation huts along the trail must be booked months in advance and Southern Pacific Hotels operates a series of guided walks from Spring through Autumn with accommodation in lodges. Track access is by boat on both ends and 40 independent walkers and a number of guided walkers are started each day.

Conclusions Drawn from Role Modelling Successful Trail Networks Outside of BC

Trail	Market	Key Features Contributing to Success
The Bruce Trail	Recreational. Educational. Local and worldwide ecotourists.	<ul style="list-style-type: none"> · Restricted to single purpose trail · 14 education centres and 8 interpretation centres along the trail · Built and maintained by volunteer network willing to dedicate considerable time and expertise · Management divided into 9 clubs · Trail run by elected Board of Directors · Paid staff to field inquiries and distribute information · Clearly defined objectives · Strong landowner relationships · Widely circulated newsletter and Internet presence
East Coast Trail	All levels of hikers	<ul style="list-style-type: none"> · Recruit volunteers from communities along the path for construction assistance to connect communities · Maintained by custodian program set up by East Coast Trail Association · Trail divided into manageable units varying in length. · Each section has obvious starts and finishes. · Section of trail goes through community roads providing services opportunities for locals. · Newsletter and Internet presence.
Appalachian Trail	Variety day use hikes to challenging back country treks	<ul style="list-style-type: none"> · Restricted to foot use only. · Appeals to broad section of users. · Accommodation shelters along the Trail · Stage areas for learning experiences · Visitor services/meals · Strong organization and management · 31 affiliated organizations with maintenance responsibilities for specific portions · No user fees · Half of each year's budget goes to protection and stewardship
Great Divide Trail	Wilderness long distance trail	<ul style="list-style-type: none"> · Connects with other provincial and national parks · Trail links with backcountry huts and youth hostels · Strong organization and management
Milford Track	Ecotourist General Consumer	<ul style="list-style-type: none"> · Lodges with options for camping · Lodge users charged a fee of \$600, campers \$100 · Package tours · Use extended into rainy season · Strong organization and management

2.7 Overview of Long Distance Trails

in B.C. (Over 25 km)

There are hundreds of hiking and backpacking trails catalogued in B.C., many of which lie within the boundaries of provincial and national parks. The majority of these trails are between 5 - 11 km in length and range from easy to challenging levels of ability, appealing to casual walkers and avid hikers alike. It is difficult to assess throughput numbers as measuring or registration systems are not enforced or produce inaccurate results and cannot be relied upon.

The following is an overview of trails over 25 km located with B.C.

Name	Location	Description and Characteristics	Length of Trail
Baden Powell Centennial '71 Trail	Cypress Provincial Park, North Vancouver.	From Horseshoe Bay to Deep Cove along the north Shore Mountains with two sections passing through Cypress Provincial Park.	41.7 km
Beaver River Trail	Revelstoke, Glacier National Park	Very strenuous. Random camping permitted beyond 5 km from pavement. Trail travels through old growth forest, along Beaver River to higher ground and Grizzly Creek. Warden cabins along the way are not for public use. Takes about 3 days to complete. A wilderness pass is required for backcountry use.	42 km one way.
Bonnevier Trail	Hope, Manning Provincial Park	Moderate. Takes approximately 10 - 12 hours to complete.	29 km one way
Cape Scott Provincial Park	Port Hardy	Easy to difficult. Trails range in length from 2 - 30 km. - Guise Bay 20.7 km takes 7 hours, Cape Scott 23.6 km takes 8 hours.	2 - 30 km
Fraser River Route	Prince George, Mount Robson Provincial Park	Difficult. Goes from Fraser River to Tonquin Creek. It is a difficult route and takes about 2 days to complete.	25 km
Frosty Mountain Loop Trail	Hope, Manning Provincial Park	Difficult. Trail goes to highest peak in the park. The trails take approximately 9 - 11 hours to complete.	29.2 km round trip
Galloping Goose Trail	Victoria/Matheson Lake Regional Park	Suitable for cycling, walking or horse riding - former rail line.	69 km
Howe Sound Crest Trail	North Vancouver, Cypress Provincial Park	Difficult. Rugged trail that goes to Lions and Deeks Lake and then descends to Highway 99 south of Porteau Cove Provincial Park. Trail is for experienced hikers and backpackers.	30 km
Helmet Creek to Floe Lake Trail	Radium Hot Springs/Banff	Strenuous. Camping at 2 campsites. Trail is a series of climbs and descents.	30 km

Name	Location	Description and Characteristics	Length of Trail
Mid Coast Trail	Tofino, Vancouver Island	Remote location. Compared to West coast Trail. Follows the beach along the western fringes of Vancouver Island. Protected by Clayoquot Land Use decision. Attracts handful of purists - its remoteness best protection. Trail head reached from Tofino. Rustic camping area.	43 km
Moose River Route	Prince George, Mount Robson Provincial Park	Difficult. For experience hikers. Takes about 6 days to complete and follows the Moose River to Moose Pass on the Continental Divide.	70 km
Mount Edziza Provincial Park	Smithers/Telegraph Creek/Dease Lake	No vehicle access to park. Hiking is for hardy and the experienced.	119 km
Stone Mountain	Fort Nelson	Expert. Wilderness camping. A difficult trail that requires good skills with map and compass. Usually required 2 - 3 days.	35 km.
Wokkpash	Fort Nelson	Intermediate, expert. Two main trails in the park, the Wokkpash Valley Trail and McDonald Creek Trail. The Wokkpash Valley access requires hiking or driving and passing a creek. Trail is about 25 km and can be done in about 3 days. The MacDonald Creek Trail is an expert trail of 70 km and can take 7 days to complete.	25 km 70 km

2.7.1 West Coast Trail, Pacific Rim National Park , Bamfield to Port Renfrew, Vancouver Island

The West Coast Trail (WCT) is located in the Pacific Rim National Park Reserve on the West coast of Vancouver Island and is one of three geographic units that comprise the Reserve. At one time, the WCT was a lifesaving trail for shipwrecked mariners and over the years this historic trail has become an internationally known hiking trail and wilderness experience. The WCT has the reputation of being one of the most challenging hikes in North America and is therefore recommended for intermediate to advanced hikers only.

The management and operation of the WCT is the responsibility of Pacific Rim National Park and is assisted in some recreational-use operations through a partnership with the QUU'AS West Coast Trail Group, a joint venture of the Pacheedaht, Huu-ay-aht and Ditidaht First Nation. National Park personnel and QUU'AS staff patrol the WCT regularly between May and early October. They are responsible for hiker information and assistance, regulation enforcement, trail upkeep, public safety and protection of natural and cultural resources.

The WCT is open from May 1 - September 30 and is closed for the remainder of the year due to inclement weather conditions. A WCT Hiker Preparation Guide has been prepared which provides a comprehensive guide to hiking the WCT. It is excerpted as follows.

Trail Use Permits

Trail Use Permits are required on the WCT. Their purpose is to reduce overcrowding and degradation of the trail. A trail use fee is in effect for overnight users of the trail to assist in offsetting the cost of operating the WCT. Each day between May 1 and September 30, 26 hikers (20 reserved and 6 wait listed) may started at Pachina Bay (north) and 26 at Gordon Head (south). The maximum group size is 10 people. Day hikers must obtain a free day use permit before hiking at one of the Park Information/Registration centres.

There are two major water crossings on the WCT that require hiker ferry services - the Gordon River and Nitnat Narrows.

Summary of Fees:

Reservation Fee	\$25 at time of reserving	Non-refundable
Park Use Fee	\$70 at Park Information Centre	Non-refundable
Gordon River Ferry (1 way)	\$12.50 at Information Centre	Refundable
Nitinat Narrows Ferry (1 way)	\$12.50 at Information Centre	Refundable

Services

There are basic tourism services at or near both Trailheads which include accommodations, campgrounds, phones, fuel, groceries, tours and food services. All overnight users of the WCT must participate in a one-hour orientation session , pay the trail use fee and ferry crossing fees and register on the trail before they will be issued a Trail Use Permit. This takes about 1 ~~1~~ hours.

Extending 76 kilometers between Bamfield and Port Renfrew, the trail is largely within a 250 metre corridor from the shoreline. There are cable car and bridge crossings over steep ravines and ladders to access higher ground, the trail is basic in construction terms. The trail crosses through forested, rocky terrain with no shelters but several primitive campsites are provided.

Average maintenance costs per year are \$240,000, with \$400,000 per year being spent on search and rescue activities and evacuations. The first aid and emergency training program for the WCT costs approximately \$40,000 annually.

There is a surplus of hiker days available, much of this occurring at each end of the prime hiking season. During the summer period, the trail is fully booked and the park has been looking at opportunities to increase usage during off-peak seasons. The trail currently has a

quota of 9587 hikers per year between the recommended hiking seasons (April - October), averaging 50 hikers per day. Quotas for trail use were established at 7,956 until 1995 and then increased to present quota by increasing the season for 31 days. The majority of hikers come from the Lower Mainland (23%), Vancouver Island (15%), Alberta (19%) and Germany (11%). 6% of hikers come from Washington, Oregon and California.

WCT Demographics and Surveys

Surveys conducted by Parks Canada give an insight into hiker trends, behavior and expectations as follows. These trends are useful in ongoing planning, improvement and promotion activities for the Sunshine Coast Trail.

- 28% of hikers started planning for their trip more than 6 months in advance; 27.1 spent one to three months planning for their trip. The majority of hikers heard about the WCT by word of mouth and in preparation relied mainly on books and the Pacific Rim Park Package, as well as the Internet. The majority of hikers surveyed hiked the whole trail.
- 85% of those surveyed made a reservation to hike the trail and most hikers with reservations arrived on the same day or one day before their reservation date. While waiting to get onto the trail, they tended to camp, prepare for the trip and use the local amenities.
- The trail was the main destination of 84.8% of those surveyed and a planned stop for 11%. The greatest proportion stayed on the trail for 5 nights and most people were away from home for 1 - 8 nights.
- For most hikers, this was the first time they had hiked the trail although almost 75% had been on another backcountry trip before.
- The largest group were Canadian and then the larger foreign proportion consisted primarily of Germans and Americans. Of the Canadians, British Columbians made up the largest percentage.
- Average group size was 3 people; more males used the trail than females at a ration of 1.69:1. The greatest proportion were between the ages of 25 and 34 years old.
- The most important benefits of the experiences are to enjoy nature and scenery, challenge and test abilities, adventure/wilderness experience and physical fitness and exercise.
- The most important services and facilities to hikers when they come off the trail are: shuttle bus, campgrounds, showers, restaurant and meals. The items that are of the least importance are attractions and gift shops.

Parks Canada has concluded, based on information collected, that the following areas are important to hikers:

- Ensuring that the quality of information and briefing to the hikers is consistent throughout the year.
- Availability of camping/hiking supplies and basic groceries. The outlet does not need to be directly at the trailhead but at least within a short walking distance.
- A campground needs to be very close to the trailhead, providing a reliable place to stay.
- A quick response to loose or broken boardwalk, fallen trees, unsafe ladders etc. Boxes with basic supplies should be set up along the trail to make the task easier. Guardian patrolling the trail would assist in identifying areas that need immediate repair.
- Outhouses are strategically positioned and cleaned regularly.
- Provision of reliable, reasonably priced bus service to transport hikers back to the original trailhead.
- Showers - hikers require a place to clean up when they come off the trail.
- Restaurant meals - hikers need to be made aware of where they can get a restaurant meal of, at the least, coffee and snacks through a vending machine.
- Clearly show hikers where their user fees go, i.e. plaques or charts identifying improvements and projects possible due to user fees.

2.7.2 San Juan de Fuca Trail - South Coast Vancouver Island

This trail is a natural extension to the West Coast Trail. It stretches for 47 km along the western shoreline of southern Vancouver Island from China Beach and extending to Botanical Beach near Port Renfrew. Most of the trail is designed for strenuous day or multi-day hiking with some easy to moderate day hiking. There are four trailheads at Botanical Beach, Parkinson Creek, Sombrio Beach and China Beach.

The trail was created through the Commonwealth Nature Legacy as a reminder of the 1994 Victoria Commonwealth Games. Construction and preservation of the trail is through the efforts of government, local industries and citizens. Land exchanges and gifts of land have

come from Western Forest Products and Timberwest. The trail is being upgraded with funding from Forest Renewal BC and the Environmental Youth Team.

Camping along the trail is available in beach and forest sites. The fee for camping is \$5 per person per night with self-registration envelopes and safes located at each trailhead for depositing the camp fee.

2.7.3 Seven Sisters Ventures, Terrace, B.C.

A new commercial trail experience is under development near Terrace. Approval has been given to develop a 90 kilometre trail and lodge system in the Skeena West District overlooking the Seven Sisters Peaks. The project has been under development for over five years and will consist of a main lodge located on private property and a number of tent camps and backcountry lodges located on Crown Lands as well as a number of long span cable suspension bridges. The trail will be operated for profit and users will be charged a range of fees depending on the level of service chosen.

Conclusions : What has been learned from the role modelling of established BC Trails ?

Purist trail users are in the minority.

The majority of hikers using longer distance, more difficult trails are young (25-34), travel in small parties (3-4), and the majority (75%) have some hiking experience.

Soft adventure hiking is the most popular and in most demand, and widens the trail user age group (25-54).

Varied activities and multi-use are strong selling features.

Private sector and First Nations contracts are commonly let for maintenance, traversing streams and ravines, and facility management.

The Westcoast Trail hosts 10,000 users/year, each paying \$95 in user fees. Visitors come from the Lower Mainland (23%), Vancouver Island (15%), Alberta (19%), Germany (11%) and the U S West Coast (6%).

Internet and word of mouth are the most often quoted information and referral sources.

85% target the trail as their main destination, with few touring the region before or after their trail experience.

Private sector ventures that succeed provide transport, camping facilities, groceries, supplies, hiking supplies and equipment and food. Least successful are other attractions, gift shops and hotels / motels.

Of great importance to hikers is the quality and accuracy of trail information provided, the maintenance of trails and safety.

Features of Successful Trail Development		
Trail	Market	Key Features Contributing to Success
The West Coast Trail	Worldwide recreational/ ecotourism appeal. Caters to intermediate and advanced hikers.	<ul style="list-style-type: none"> • Renowned reputation. • Strong management through partnership with First Nations and BC Parks • Closed during bad weather seasons - diminishes liability issues • Extensive Hiker Preparation Guide readily available • Mandatory one hour orientation session for all hikers • Reservation System to ensure controlled use • Trail use permits and fees enforced • Regulated number of hikers per day (26 maximum) with maximum group size of 10 • Basic tourism services at trailheads • Regular surveys and user satisfaction studies
Juan de Fuca Trail	Strenuous day and multi-day to moderate use	<ul style="list-style-type: none"> • Natural extension to West Coast Trail. • Land exchanges and gifts from forest companies. • Upgraded with funding from Forest Renewal BC. • Forest and beach camping available at \$5 per person per night. • Self registration by deposit fee in envelope and safe and each trailhead.
Seven Sisters Ventures	Ecotourist	<ul style="list-style-type: none"> • 90 km backcountry trail and supporting lodge system • Development stages over five years • Main lodge and staging areas developed concurrently • Hut-to-hut hike • Strong organization and management

2.8 Stakeholder (Powell River) Interviews

A spot survey of stakeholders in the region was conducted with the following results ¹⁷. A sampling of operators in the following categories were selected:

- Hotel and Motels
- Bed and Breakfasts
- Resorts and Marinas
- Cabins and Cottage Rentals
- Campsites
- Commercial Operations
- Transportation Services

2.9 Interview Results

Are you familiar with the Sunshine Coast Trail?

Yes	No
100%	0%

What is your opinion of the Sunshine Coast Trail?

Positive	Negative
95%	5%

Comments noted:

- *Excellent for the future of the region*
- *Looking forward to further development*
- *Wonderful for region*
- *People have worked hard to develop it*
- *Very accessible*
- *Good competition for the West Coast trail*
- *Lots of people don't know about it yet*
- *Appeals to older groups*
- *One of the best*
- *Can use part of it all year*
- *Close to glacier and wildlife*

¹⁷

Note: An attempt to reach 75% of total operators was made; however, out of the total number of respondents contacted, 25% refused to participate in the survey and several were unavailable due to the off-season.

- **Concerned about poorly marked access points, lack of advertising, danger**

Does or will the Sunshine Coast Trail positively impact your business?

Yes	No
85%	15%

Comments noted:

- **Busy for two weeks this summer with trail users**
- **Not too much impact now - may be more when trail better known.**
- **More business this summer because of trail.**
- **Already noticed increase in business early spring and late fall.**
- **When it's finished, there will be more impact.**

Does or will the Sunshine Coast Trail create more business for you?

Yes	No
90%	10%

Comments noted:

- **More rooms rented**
- **More cooking and meal preparation**
- **More guests**
- **Will have to increase number of tours.**
- **Increased demand for rooms and services**
- **More requests for transportation to trail access points.**
- **Increased demand for bike rentals and camping gear.**
- **More campsite and demand for shower facilities.**

Does or will the Sunshine Coast Trail create more jobs in your business?

Yes	No
15%	85%

Comments noted:

- **Will be a while before I have to hire more people to meet the demand.**
- **I will be busier but won't have to hire anymore staff.**
- **Hard to say, but doubtful; would have to be a dramatic increase.**
- **Won't happen for five years.**
- **May have to increase staff next summer.**

Will you diversify your services to cater to trail users?

Yes	No
40%	60%

Comments noted:

- *May provide guiding services and plan extra trips*
- *Could provide boat trips to access points and trailhead*
- *Transportation*
- *Could add a hot tub and massage*
- *Already as diversified as I can be*
- *Would have to have a lot of trail business to diversity*
- *Would provide catering and lunches*
- *Outdoor clothing retail outlet*
- *Could provide parking*

Do you or will you market to trail users?

Yes	No
60%	40%

Comments noted:

- *Mention the trail on webpage and on brochure*
- *Talk to people about the trail*
- *Have a banner on their website and they have one on mine.*

Do you or will you offer special packages to trail users?

Yes	No
85%	15%

Will the Sunshine Coast Trail provide competition for your business?

Yes	No
0%	100%

Could the Sunshine Coast Trail potentially reduce your business?

Yes	No
0%	100%

What impact does or will the Sunshine Coast Trail have on the region?

	Yes	No
Bring more visitors to region	100%	0%
More use of existing facilities	100%	0%
Attract new businesses	90%	10%
Attract different age groups	85%	15%
Attract visitors from new origins	100%	0%
Build reputation of area	100%	0%
Allow business to coat-tail	100%	0%
Create new infrastructure	100%	0%

Comments noted:

- ***Will take a while before new businesses would come - can see guide/outfitters, more food and service providers along the trail.***
- ***Would attract all age groups from all over***
- ***Haven't seen much of an increase in visitors but they will come when the trail is more widely know.***
- ***Great potential to attract people as a destination.***

Management structure?

Volunteers	20%
Paid workers	25%
Government	10%
Combination	45%

Comments noted:

- ***Should not become a bureaucracy.***
- ***Should be structure to management and should be done right.***
- ***Overseen by committee of volunteers with 1 or 2 paid positions eventually.***
- ***Should be run by society like PRPAWS.***
- ***Too much for volunteers.***
- ***Volunteers okay for now but will need more organization later.***
- ***Government should be involved to oversee,***

Should the Sunshine Coast Trail charge a user fee?

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Yes	No
40%	60%

Comments noted:

- **Maybe when it is more developed.**
- **Ecotourists will pay for the privilege to use the trail.**
- **Some people can't afford a fee.**
- **Would hate to see it but it may be necessary.**
- **A nominal amount would be okay.**
- **A fee would provide the money for upkeep.**
- **Who would enforce payment of the fee - too many access points.**

How should the Sunshine Coast Trail be marketed? (Multiple answers allowed)

Internet	85%
Brochures/Accommodation Guides	65%
Through tourism groups	75%
Magazines	15%
T.V.	5%
Word of Mouth	75%

Comments noted:

- **The website should be linked to federal and provincial tourism sites and linked with other local businesses**
- **Magazine articles such as Beautiful BC**
- **Listing in accommodation and attraction guides**
- **Brochures on ferries**
- **More signage**
- **Advertise in motor home rental outlets**
- **Visitors Bureau**

To whom should the Sunshine Coast Trail be marketed?

All tourism segments	85%
Outdoor enthusiasts	15%

Comments noted:

- ***The trail appeals to everyone, because it is segmented and easier than the West Coast Trail.***
- ***Some people hike for just the day or for several days; lots of access points. Easy for everyone, but some of it can be challenging.***

To which age group?

All	50%
Baby boomers	30%
Younger	20%

Comments noted:

- ***Appeals to all ages, but lots of 40 - 50+ (baby boomers) are into it.***
- ***Have seen everyone from 7 - 70 on the trail.***
- ***Not as rigorous as West Coast Trail - anyone who is fit can do it.***

Originating from where?

Canada	20%
U.S.	0%
Germany	15%
Other European	5%
Combination of all	60%

Comments noted:

- ***Should promote the trail in B.C. and Canada first.***
- ***Get lots of visitors from Germany already - they spread the word.***
- ***Could get interest from California and Washington, but greatest potential is Europe, especially Germany.***
- ***Has universal appeal.***

Who should maintain the Sunshine Coast Trail?

Volunteers	30%
Paid workers	0%
Unemployed	20%
Government	5%
Combination of all	45%

Comments noted:

- **Good job for summer students.**
- **Should utilize unemployed in local area first - don't bring in unemployed from other areas.**
- **Volunteers doing a good job.**
- **Will get too much for volunteers, eventually will need paid staff if it takes off.**
- **Municipality and provincial government should get involved**

What could be potential funding sources for the Sunshine Coast Trail? (Multiple answers allowed)

Donations	20%
User fees	50% ¹⁸
Taxes	10%
Fundraising events	25%
Government grants	40%
Economic development	5%

Comments noted:

- **Could have donation boxes at all access points.**
- **User fees could contribute to upkeep and marketing, like the West Coast Trail.**
- **Government should contribute.**
- **Those benefiting from trail, such as operators in regions, should pay a small tax.**
- **Corporate donations.**

Would you like to become involved with the Sunshine Coast Trail?

Yes	No
45%	55%

Comments noted:

- **Am already involved.**
- **Don't have enough time - too busy with my own business.**
- **Could be involved in off-season, don't have time during summer months to sit on Committees. Should plan during winter for busy season.**

¹⁸

Some respondents felt that a user fee was inappropriate (40%) at this time, but subsequently indicated that they felt it would be a viable method of fundraising (50%)

2.10 Economic Role Modeling

The purpose of this extensive exercise of research, interviews and 'Economic Role Modeling' is to focus strictly on the financial aspects of existing trails, including capital and building costs, employment, maintenance costs, direct / indirect / spinoff economic benefits and other financial and cost issues.

Further, key elements of this research have been extrapolated into the creation of proformas (capital costs and operating budgets) designed for the Sunshine Coast Trail, as presented in subsequent chapters in this Business Plan.

2.10.1 Economic Impacts and Effects

The total impact resulting from an increase in visitor expenditures can be described in terms of direct, indirect and induced effects. Understanding these three levels of effect show how the initial trail-related expenditure generates additional economic activity within the local and regional economy.¹⁹

DIRECT EFFECTS

Purchases by trail users

+

INDIRECT EFFECTS

Purchases of supplies and materials by the producers of trail-related products and services, and the purchases made by the producers of the supplies and materials

+

INDUCED EFFECTS

Purchases of product supplies and materials by producers, resulting from purchases by households

=

TOTAL ECONOMIC EFFECTS OF TRAIL EXPENDITURES

19

Economic Impacts of Recreational Spending on Rural Areas, John C. Bergstrom, University of Georgia for USDA Forest Service, undated

Visitor expenditures that may be attributed to a trail may include food and beverages, hiking equipment and guide services. Direct effects result directly from the actual purchases by visitors. Local businesses meeting the visitors' demands for goods and services must purchase supplies to meet this demand. These purchases by local businesses are direct effects.

Indirect effects occur when suppliers to local businesses must increase their purchases of production materials and services from other businesses who in turn increase their purchases. A chain reaction is created as each supplier must increase their purchase of inputs and each exchange increases the total indirect effects. For food and beverage, indirect effects are when the local food manufacturers purchase additional product from local farmers and the farmers then purchase additional supplies in order to grow products necessary to meet the demand.

Consumer purchases resulting from the increased income of business owners and households set in motion another sequence of expenditures and purchases; the induced effects. For example, the induced effects would include all the purchases made by households which receive wages from their employment at the manufacturer or local market. Induced effects result from wages paid to households by both directly and indirectly affected businesses. These induced effects can be estimated from economic models.

2.10.2 Economic Impact Highlights from Various Existing Trails

- Several key services and facilities were identified by West Coast Trail (WCT) hikers who responded to the 1995 trail user survey²⁰. Accommodation was a key resource when starting and finishing the WCT. The night before starting the trail, respondents identified the use of several types of commercial accommodation facilities including: campgrounds (43%), hotel/motel (21%), bed and breakfast (3%) and hostels (3%). Demand for commercial accommodation after finishing the trail included: motels/hotels (28%), campgrounds (15%), hostels (6%) and bed and breakfasts (2%). Over 35% of respondents stayed in their place of residence or with friends or relatives the night before and after the hike.
- Based on average daily tourism expenditures, the magnitude of the economic contribution to the basic tourism industry in the North Island from the proposed North

²⁰

Working to Improve Your West Coast Trail Experience, Pareto International, 1995 for Parks Canada

Coast Trail, based on a trail use estimate of 7,200 persons per year, could eventually reach and exceed \$865,000.²¹

- For a 65 km. section of the proposed North Coast Trail, it had been calculated that construction would generate 40-60 direct jobs and 18-26 spin-off jobs. Further, trail maintenance would generate 7-9 direct and spin-off jobs.

²¹

North Coast Trail - Socio-Economic Impact Assessment, Westland Resource Group for Port McNeill Forest District, Ministry of Forests, March 31, 1996

- The trails in New Brunswick have over 80 volunteer Trail Sponsor Groups and employ around 1500 people (average 6 months per year) ²²
- Direct expenditures of Bruce Trail users annually now support over 1100 full-time equivalent jobs in Ontario with at least 191 of these supporting local jobs in the communities along the Bruce Trail.
- Direct spending on non-durable goods, i.e. restaurants, accommodation, car expenses, was around \$4.4 million within the Bruce Trail region, a gross direct and indirect impact of around \$10 million.
- 33% of Bruce Trail users interviewed indicated that they had made purchases (during the past year) of durable goods relating to their use of the Bruce Trail. These purchases made over a 12-month period had a direct impact of over \$20 million and a gross direct and indirect impact of almost \$47 million, which supported almost 900 jobs.
- A survey of trail users in Minnesota found that users who traveled less than 25 miles spent an average of just \$0.61 to \$2.68 per day, while those traveling 25 miles or more spent up to \$53.20 per day on average.
- 70% of all trail users spent on non-durable goods during their visit to the Bruce Trail. Of those 70%, the average expenditure per group was \$60.99. 75% of this amount was spent within a 10-km corridor on either side of the trail, resulting in a high local economic benefit. Each group had an average of 3.12 persons.
- Visits to the Overmountain Victoria National Historic Trail sites were found to generate a significant economic impact. On average, users spent \$49.05 per person, per day on their trips. The average daily expenditures were: restaurants \$11.29, food and beverages \$2.69, lodging \$12.29, retail purchases \$7.35, all other expenses \$8.49. ²³

²² Go for Green Active Living & Environment Program, Trail Monitor Newsletter, 1999

²³ Moore & Barthlow, 1998

- Analyzing the spending of 556 trail users from nine trails in Nova Scotia found that the average spending per party for non-Nova Scotians is about \$1,210. This breaks down to about \$1,120 per party beyond a 30 minute drive of the trail and about \$90 within a 30 minute drive of the trail.²⁴

2.10.3 Further Identified Benefits of Existing Trails

Money Spent by Trail Users

Leisure is often considered to be discretionary, or free time, away from work and other responsibilities where participants choose and control their activities. Outdoor recreation is a major component of leisure and accounts for a substantial part of people's discretionary spending.

Expenditures by Residents

Specifically, local residents who use the trail may spend money to get to and from the site, on supplies and equipment to pursue their recreation experience, at on-site concessions and events, and nearby attractions.

Travel Trend

Recent trend analyses show that weekend trips to nearby areas are increasing, while the traditional two-week summer vacation is declining for today's travelers. This is due to the job complications of two income families, limited time budgets, or interest in more specialized recreation experiences. Trails can have varied levels of tourist draw. They can be travel destinations in themselves, encourage area visitors to extend their stay in the area or enhance business and pleasure visits. The level of tourist draw determines the appropriate proportion of the visitor's time and travel expenditures that can be attributed to the trail. Tour operators, outfitters and guides are also important to the local economy due to the expenditures their businesses generate, the fees they pay to operate and their advertising and promotion of local resources.

Property Values²⁵

²⁴ Nova Scotia Hiking Trail Study

²⁵ The Potential Economic Benefits of Rail-Trails in the Region of Peterborough, Ontario, M.J. Bernstein & J.S. Marsh, 1992

Trails generate awareness for, and interest in an area. This can be reflected in increased real property values and increased marketability, as well as the municipal government would benefit from a higher tax base.

Corporate Relocation and Quality of Life

The ability to attract new, expanding or relocating businesses and to retaining the existing ones, is very important to communities. It can increase or stabilize a community's employment and tax base. The importance of quality of life is becoming increasingly significant in attracting new business. Quality of life was ranked third in importance behind access to domestic markets and availability of skilled labour in a survey of CEO's. Important factors contributing to a high quality of life are: access to natural settings, safety, recreational and cultural opportunities and open space.

Consumer Surplus and Recreation Values

A recreation value is the benefit calculated in dollar terms that one receives from being able to enjoy an activity even if the activity is free. When someone pays \$5 for an item, but would be willing to pay \$8, the \$3 difference is know as the "consumer surplus".

This is not a direct economic impact, however, as no exchange of money would occur, but it does represent the possible value that local users of a trail would place on such as facility.

Tax Receipts

Any contributions that might be made by government agencies to the development of trails would be in part regained through trail-related tax receipts.

Long term benefits such as health and fitness effects and an improvement in the tourism account deficit would also generate funds for the governments.

Micro and Macro Tourism Deficits

Every time a Canadian citizen decides to travel to a foreign country, the Canadian economy suffers. When goods and services are purchased outside of Canada, the economic benefits are enjoyed in the foreign country.

In that sense, tourism is a net exporter.

Any developments which may make the region on in which it is more desirable for both local residents and visitors to spent their leisure time, can have significant economic impacts.

2.10.4 Economic Impact Study of the Bruce Trail²⁶

The Bruce Trail follows the ridgeline of the Niagara Escarpment in south Ontario for a total trail length of 762 km.

Expenditures for Non-Durable Goods by Sector	
Sector	Average Expenditure In Region
Restaurants	\$27.09
Retail Food and Beverage	\$19.18
Accommodation	\$79.08
Retail Purchases	\$30.70
Car Expenses	\$13.36
Other Transportation costs	\$5.00
Fees	\$48,30
Other	\$22.00

Expenditures for Durable Goods by Category	
Category	Average Expenditure
Clothing	\$79.86
Equipment	\$182.50
Books, Guides, Maps	\$19.08
Memberships/Subscriptions	\$38.33
Other	\$30.66

²⁶

An Economic Impact Study of the Bruce Trail, Alicia Schutt, Trent University, undated

2.10.5 Maintenance and Operating Costs

Cape Scott Trail Maintenance and Operations

The main characteristics of the Cape Scott Trail include:

- The trail is 16 km in length and is graded from a Class 1 - a Class 4 trail. There is around 0.5 km of Class 1 at the parking lot with the remainder of the trail falling into other classes. The trail was not formally constructed and evolved from a horse trail.
- Four people are employed for 3-4 months a year on maintenance and park operations. The wage rate is approximately \$600 weekly with an additional 18% going towards benefits. Approximately 90% of their time is allocated to maintenance.
- Currently the maintenance expenditures are not large enough to maintain the trail in its required operation condition. Additionally, there are problems with maintaining the trail due to its lack of a formal construction phase.

Cape Scott Trail Costs and Employment				
	Employment (PY's)	Employment Income	Benefits	Total Cost
Trail Maintenance				
Trail Maintenance Crew consisting of 4 people working 4 months with 90% of their time committed to maintenance	1.12	\$35,300 wages	\$6,350	\$41,650
Materials				\$5,000
Operations				
4 people working on operations 10% of the time	0.12	\$3,920	\$700	\$4,620
Total Cost	1.24			\$51,256

The maintenance component of the trail represents approximately \$46,650 for the Cape Scott trail or approximately \$2,915 per kilometre with \$2,603 per kilometre associated with wages and benefits. The operations component works out to approximately \$290 per kilometre with all of this expenditure associated with wages and benefits.

Maintenance and Recapitalization of the West Coast Trail (WCT)

The characteristics of the WCT include:

- The WCT lies between Bamfield and Port Renfrew, a distance of 77 km. The Interim Management Guidelines for 1994 classify the WCT as a primitive backcountry experience, but because of the extensive improvements and addition of structures that have been done to the trail and the level of maintenance, the trail better suits the description for a Class 3 - Major Trail.
- On the WCT, brushing, windfall, clearing and campsite maintenance is contracted out to three local First Nations. Each receives about \$20,000 per season for this work. They usually employ two or three people each to do the brushing and windfall work and one person for campsite cleaning.
- The park maintenance crew of three people maintain the structures and facilities. These jobs represent ongoing seasonal work. The park capital crew is comprised of three to four people who are involved in rebuilding structures and facilities. This is term employment for the duration of the capital project which is estimated at an additional five years.
- The maintenance expenditures for the WCT represent approximately \$2,508 per kilometre with approximately \$2,200 associated with wages and benefits. For the re-capitalization component approximately 38% of every dollar spent goes into wages and benefits.

West Coast Trail Maintenance and Capital Upgrading				
	Employment (PY's)	Employment Income	Benefits	Total Cost
Regular Maintenance				
Supervisor	1	\$43,000	\$7,750	\$50,750
Maintenance Crew - 1 lead hand and 1 labourers	1.7	\$54,600	\$9,800	\$64,400
Materials				\$18,000
First Nations Contracted Maintenance (wage rate @ \$15 per hour/benefits of 18%)				
2 - 3 brushing jobs and 1 job cleaning campsites	0.55	\$14,760	\$3,240	\$18,000
2 - 3 brushing jobs and 1 job cleaning campsites	0.55	\$14,760	\$3,240	\$18,000
2 - 3 brushing jobs and 1 job cleaning campsites	0.55	\$14,760	\$3,240	\$18,000
Materials				\$6,000
Total Maintenance	4.35	\$141,880	\$27,270	\$193,150

West Coast Trail Maintenance and Capital Upgrading				
Recapitalization Program				
Capital crew - 1 lead hand and 2 labourers	1.8	\$54,800	\$9,900	\$64,700
Boat Operator/Labourer (supports maintenance and capital work)	0.58	\$18,200	\$3,300	\$21,500
Materials (goods and services)				\$110,000
Materials (compost toilets and signs)				\$30,000
Total Recapitalization Program				\$226,200
Total Cost	6.73			\$419,350

Estimates of Maintenance, Operation and Recapitalization for the Proposed North Coast Trail						
Trail	Average per Kilometre			Total for 65 km of NCT		
	Employment (PY's)	Wages & Benefits	Total Cost	Employment (PY's)	Wages & Benefits	Total Cost
Maintenance						
Cape Scott	0.07	\$2,600	\$2,920			
WCT	0.057	\$2,200	\$2,510			
North Coast Trail	0.063	\$2,400	\$2,715	4.1	\$156,000	\$176,500
Operations						
Cape Scott	0.0075	\$290	\$290			
North Coast Trail	0.0075	\$290	\$290	0.5	\$18,850	\$18,850
Ongoing Recapitalization						
WCT	2.38	\$86,200	\$226,200			
North Coast				0.87	\$32,150	\$84,500
North Coast Trail Totals				5.47	\$207,000	\$279,850

Construction Costs and Wage Percentage Estimates for the Proposed North Coast Trail					
	Construction Cost	Wages and Benefits (%)	Wages and Benefits Costs	Wages and Benefit (per hour)	Jobs (FTE's)
Cape Scott Trail		30			
Juan de Fuca Trail		67			

Construction Costs and Wage Percentage Estimates for the Proposed North Coast Trail					
Inland Lake Trail		80			
Average of 3 Trails	59				
Port McNeill Estimate	\$4,230,000				
Fair Wage Schedule (Labourer adjusted by 10%)				\$28.36	
Projected NCT	\$4,230,000	59%	\$2,495,000	\$28.36	49
Low Employment Range	\$4,230,000	50%	\$2,115,000		41
High Employment Range	\$4,230,000	70%	\$2,961,000		58

Wage Rate for Various Trail Tasks			
	Wages (per hour)	Benefits	Wages and Benefits (per hour)
Cape Scott maintenance workers	\$15.00	18%	\$17.70
Cape Scott construction workers	\$12.00 - \$14.00	18%	\$14.16 - \$16.52
West Coast Trail - labourer - foreman - supervisor	\$15.00 \$17.50 \$20.00	unknown	
Juan de Fuca Trail - construction workers	\$7.00	unknown	
Fair Wage schedule - labourer	\$19.63	\$5.71	\$25.79

Average Annual Employment Income			
	Gross Income (Excluding Benefits)	Taxes Paid	After-Tax Income
Trail Construction (labourer)	\$38,880	\$9,080	\$29,800
Engineering and Architecture	\$50,000	\$13,730	\$36,730
Trail Maintenance and Operations	\$31,030	\$6,010	\$25,020

Average Annual Employment Income			
Forestry Worker	\$53,000	\$15,900	\$37,100
BC Average for non-local	\$28,950	\$5,310	\$23,640

2.10.6 Spin-off Estimates

Regional spin-off impacts (i.e. indirect and induced) estimates are based on a methodology outlined by the Ministry of Finance and Corporate Relations. For regional trail construction and maintenance, the construction multiplier for the Port McNeill Forest District is used. This value, with no safety net, is 1.44. This means that for every direct job, there will be an associated 0.44 jobs of spin-off activity. The adjusted average non-basic after-tax income for the Port McNeill Forest District is approximately \$19,800.

At the provincial level, spin-off impacts associated with construction have been derived from information associated with the British Columbia Input/Output model. Through discussions with the Ministry of Finance and Corporate Relations, it was determined that a provincial construction multiplier of 2.35 could be used. It should be noted that this construction multiplier is sensitive to the breakdown of the project expenditures (i.e. labour and materials, etc.) and should only be viewed as a rough approximation of activity.²⁷

²⁷

North coast Trail, Socio-Economic Impact Assessment, Westland Resource Group for Port McNeill Forest District, Ministry of Forests, March 31, 1996

2.11 Trail Liability and Risk Management Issues and Directives

2.11.1 Trail Management and Legal Liability ²⁸

There are many types of liability concerns relating to trail organizations, trail establishment and operation:

- Environmental liability for clean up of land contamination;
- Liability for nuisances caused to neighboring lands;
- Liability for the actions of directors, staff and volunteers in the course of their duties;
- Employment, tax and other related issues;
- Occupational health and safety issues; and
- Liability for visitors' injuries on the trail.

Common sense will address many of these issues; however liability for injuries or damage occurring on or near the trail properties is of frequent concern and requires ongoing vigilance.

To succeed in a lawsuit for negligence, a person would need to prove the existence and standard of a legal duty for the trail group to take care with respect to visitors on trail; a breach of this duty and standard by the trail group; and that the breach caused the visitor's injury or damage. Defenses available to a trail group when defending a negligence suit include that the visitor was aware of and assumed the risks of traveling on or near the trail; that the visitor contributed to injury or damage through their own negligence and that they signed a waiver.

2.11.2 Strategies for Risk Management

Trail groups can avoid accidents and prevent law suits by a deliberate, active program of risk management as follows:

- Assign risk management responsibilities within the group;

²⁸ Trail Legal Liability, Ian Attridge and David McRobert, Ontario Trails Council Conference, 1996

- Plan, develop, maintain, repair and improve trails and programs to meet accepted standards;
- Regularly determine trail and nearby land use and access;
- Regularly inspect for, report and address trail hazards;
- Document, report and act on trail accidents and claims;
- Educate and train staff, management and volunteers;
- Obtain appropriate insurance; and
- Monitor and respond to legal developments.

A Risk Manager's Checklist

- *It if moves - it will collide with something*
- *If it is constructed, it can break*
- *If it is liquid, it can squirt, slip, leak or drown*
- *If it is gas, it can escape*
- *For every injured child, there will be two litigious parents*
- *An injury will probably occur where and when no one is looking (including the injured party)*
- *Safety equipment has legs*
- *Anything over two feet high will be treated by kids as a climbing apparatus*
- *If it is up, it can fall*
- *If its alive and under ten years old, it will be curious and adventurous*
- *If its alive and over ten years old, it will be curious and adventurous.*

- Brian D. Wynn - Canadian Parks/Recreation Assoc.

2.11.3 Trail Conflict Resolution

Conflicts in trail use can be divided into two major categories:

- Conflicts with other people (user conflicts); and
- Conflicts between the users and the resource (environmental conflicts)

User conflicts arise when different user groups each believe that another trail use is inappropriate or incompatible with their own in some way. Generally this is due to differences in attitude, behavior and perception. For example, conflicts can arise between hikers and mountain bikers.

Research and surveys conducted by IMC Group (consultants specializing in multi-use trail design) show that avid hikers usually perceive mountain bike riders as intruders within their domain with a proprietary right emerging because:

- Hiking use predates mountain bike use;
- Hikers perceive that trails have been designed for hiking purposes only;
- The hiking experience is different from cycling;
- Hikers have vested interests as many of the trails have been constructed and maintained by volunteer hiking groups;
- Trail damage is blamed on mountain bike usage; and

- Perception of discourteous behavior to hikers from bikers.

Additionally, equestrian riders and cyclists are often thought to be incompatible on a shared trail as horses are frequently startled by cyclists and react unpredictably.

Environmental conflicts in natural areas are considered to be associated with mountain bikes, and although horseback riding and hiking can be equally detrimental to the trail system, mountain bike riding is still relatively new and targeted as the main cause of damage.

The most common concerns seem to be associated with:

- Soil erosion
- Vegetation damage; and
- Disturbances to wildlife.

Soil erosion is probably one of the most visible signs of trail damage. It can be caused wherever there is the wrong combination of soil type, slope and user traffic. Mountain bikes are usually blamed for causing heavy erosion on multi-use trails, however, there are some studies that suggest that the impacts of mountain bikes are only slightly greater than for hikers and less than equestrian use.

Vegetation damage usually occurs when trail users of all types leave the established trail to create new “unofficial” trails or to avoid trail obstructions such as wet spots, fallen logs or rocky terrain. The initial result is that vegetation is trampled and/or destroyed.

Disturbance to wildlife is a difficult factor to evaluate. If the trail has been improperly located within a sensitive wildlife habitat there can be significant impacts, regardless of the trail use.

It appears, therefore, that unbridled use of mountain bikes, or any other trail use, is likely to have adverse impacts on the natural environment. However, trail maintenance experts agree that much, if not all of it can be prevented through practicing low impact riding techniques and through proper design, maintenance, monitoring and management of the resource.

2.11.4 Implementation and Monitoring

Trail construction has typically been the responsibility of the sponsoring agency. More and more, however, as in the case of the Sunshine Coast Trail, trails are being built with the assistance of volunteer workers who are typically involved because of a particular interest. In many cases, their abilities and enthusiasm lead to a sense of ownership in the trails which in turn fosters the sense of long term involvement necessary for informal trail monitoring and maintenance. In this way, a win-win situation is created; there is greater trail

access, which is somewhat self regulating through user interest, the sponsoring agency saves time and budgets for other projects and the community takes pride in having participating in a meaningful way.

The implementing mechanisms necessary to acquire access to land can be quite complicated, protracted and costly, drawing on the provisions of numerous legislated statutes. On the other hand, it may also be quite easy to reach simple agreement with like-minded landowners. Each situation must be evaluated on its own merits.

Report : Section Three

<i>Business / Action Plan</i>	The Business / Action Plan encompasses a strategic analysis of the Sunshine Coast Trail's proposed operation, financial forecasting, benefits analysis, strengths and weaknesses, capital and operating costs, proposed ownership and governance, marketing strategies and a Gant Chart Action and Implementation Plan.
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3.1 Local Infrastructure In Place to Support the Sunshine Coast Trail ²⁹

Accommodations

- There are a high number of facilities in the area categorized as resorts and marinas, two high quality hotels and several mid-level motels. In total, there are 7 motels, 7 full service hotels, 18 bed and breakfasts, 2 hostels and 8 cabin and cottage rentals representing an excess of 525 available rooms.
- In addition, there are 3 resorts and marinas, 10 campgrounds and 8 forest recreation sites providing a further 462 accommodation spaces.
- Along the Sunshine Coast Trail itself, accommodation is provided in the form of 12 potential camp sites, 3 of which are developed, 3 bed and breakfasts and 1 cabin, 1 hostel, 1 motel as well as 2 restaurants.

Food and Beverage

- There are 29 restaurants, 18 cafes and snackbars and 12 fast food outlets in the Powell River area providing food and beverage services.

Tour Operators

- Out of the 36 tour operators listed, only 4 are categorized as general nature and adventure, with the majority of operators providing marine based services.

Travel Services

- Other travel-related services include a tourist information centre, 2 travel agents, 1 rental car agency, and 6 foreign exchange facilities.

²⁹

Information extracted from the Powell River Tourism Study, PriceWaterhouseCoopers for Community Futures Development Corporation of the Powell River Region, August 1999

Access and Transportation

- Access to Powell River by land on a scheduled ferry service operated by B.C. Ferries or by scheduled air travel with Pacific Coastal Air.
- In the Powell River area, transportation services consist of 1 scheduled bus service, 2 airline services, 11 ferry services, and 4 water taxis

Other Attractions

- The primary attraction for the region is Desolation Sound Provincial Marine Park, one of six area parks. The renowned Powell River Canoe Route and several diving areas and wrecks also draw visitors to the region. There are also 36 other trails available for hiking and mountain biking, as well as salmon hatcheries, golf course, arts and craft galleries museums and a heritage walk, and over 34 events and festivals scheduled throughout the year. There is also a strong First Nation heritage.

Infrastructure Development

- Several projects have been proposed for Powell River that would support and enhance tourism in the area. These include improved signage and visitor management, improved townsite aesthetics and a new airport development.
- Various projects at different stages of organization have been proposed or are underway which include:
 - Powell River township waterfront development
 - Powell River Townsite Heritage Park
 - Marine Touch Pool
 - Cranberry Bird Sanctuary
 - Sliammon First Nation Tourism Product Development
 - Millennium Park Project

3.2 Jurisdiction, Tenure, Forestry Issues

The Sunshine Coast Trail traverses 8 jurisdictions in its 180 km trek. Resolving the tenure issue and securing agreements for access and management of the trail is an issue that requires resolution.

For the majority of the trail jurisdiction is not an insurmountable task, however, there are several key tenure issues that will require resolution. The jurisdictions traversed by this trail include the following:

- Provincial Crown Forest Land
- Powell River Regional District Parks
- Corporation of the District of Powell River Parks and roads
- BC Ministry of Highways
- BC Ministry of Environment Lands and Parks and Protected Areas
- Weyerhaeuser Fee Simple Lands ³⁰
- Pacifica Fee Simple Lands

In addition, the trail also overlays Sliammon First Nation's identified Treaty Settlement Lands.

3.2.1 Provincial Crown Forest Land

Issues on Provincial Forest Lands

1. Management of the Forest Resources Adjacent to the Sunshine Coast Trail

³⁰

Weyerhaeuser reiterated its position in a Jan 4/00 letter that there are no commitments to maintain buffers along the trail. Further, it is believed that portions of the trail can be relocated into areas already removed from forestry. It is also stated that the buffer zone and ribbon of old growth concepts are unrealistic. Discussions must ensue to permit both forestry and the trail to co-exist without impacting on forestry.

The Ministry of Forests (MOF) maintains the primary responsibility for managing the Provincial Crown Forests. The Ministry of Forests Act states that, among other duties, the purposes and functions of the of MOF are to:

Plan the use of the forest and range resources of the Crown, so that the production of timber, the grazing of livestock and the realization of fisheries, wildlife, water, outdoor recreation and other natural resource values are coordinated and integrated, in consultation and cooperation with other ministries and agencies of the Crown and with the private sector.

The policy instruments for implementing these purposes and functions are the Forest Act, the Forest Practices Code Act and the attendant Recreation Regulations.

The Sunshine Coast Trail has been recognized and approved by MOF through section 102 of the Forest Practices Code. However, a point of tension has been identified surrounding management of the trail in Crown Land. The letter of authorization from MOF states the following:

- This authorization does not preclude future forest management activities in and around the trail location. There is no commitment to maintenance of buffers with trails except when designated by the District Manager. If a designated trail is disturbed through approved harvesting it shall be re-established by the licensee upon completion of operations.
- Our policy on trail use provides for integration of all non-motorized users. This authorization does not provide for exclusive use of this trail by The Powell River Parks and Wilderness Society (PRPAWS).

Weyerhaeuser reinforces this position in correspondence with MOF. In a letter dated 19, October 1998, Ray Balogh, the divisional manager, states.... "We stress again the original terms of agreement regarding the Sunshine Coast Trail establishment, which clearly stated that there are no commitments to maintain buffers along the trail. Our position all along has been to work cooperatively with PRPAWS to minimize conflicts. We will continue to do so. However, we do remain opposed to establishing formal buffers."

The PRPAWS has identified the management of the resources surrounding the trail as a critical parameter governing the success of the trail. The official stance of PRPAWS regarding the management of the trail is one of complete protection and states in its literature that a trail corridor must be established as part of overall management plan for the trail. PRPAWS has determined that a reserve buffer of 50 meters on either side of the trail with a further 50 meter special management zone is required and that within this special management zone only partial harvests would be permitted.

PRPAWS is attempting to position the Sunshine Coast Trail within the ecotourist market and contends this market placement will be impacted if harvesting and other related resource extraction activities are undertaken across the trail. In presenting their case, PRPAWS cites a 1994 Report by ARA Consulting Group in which it is indicated that a

natural setting is the key driver in motivating the ecotourism market. Furthermore, a 1992 article in the Journal of Travel Research reports that wilderness and undisturbed nature is one of the top six motivators for ecotourism travellers.

Another reason cited by PRPAWS for developing a buffer for the trail is their desire to create a "Ribbon of Old Growth". Once again this is related to market positioning and by preserving a trail corridor, PRPAWS hopes the trail will develop into a unique attraction. In fifty years, the trail will begin to develop old growth attributes and will become a draw for tourists seeking recreation within a natural environment.

Furthermore, PRPAWS hopes to use the concept of a developing "Ribbon of Old Growth" as a current marketing tool in the present. By marketing their vision of the trail as a ribbon of undisturbed old growth, PRPAWS hopes to capture the imagination of tourists long before the actual attributes of the old growth develop and is confident people will come to the trail knowing one day it will be old growth forest. These tourists are making a statement about their dedication and contribution to preservation of old growth forest and thereby creating a sense of ownership and stewardship.

The positions stated above are sound concepts that bear consideration. However, they must be measured against the status quo. Both MOF and Weyerhaeuser point out that buffering the trail limits opportunities for resource extraction. Weyerhaeuser's economic interest in the land is limited to the trees by way of the Tree Farm License they hold. There is no mechanism in their tenure that enables Weyerhaeuser to collect levies for recreation use on the TFL. As such, Weyerhaeuser suffers an economic loss if buffers are created. Their only redress, should the trail be preserved, is compensation.

Weyerhaeuser has an understandable weariness of the option of compensation. In similar cases outside of Powell River, Weyerhaeuser was forced to take the Government to court to seek redress and compensation. Even without legal determination, compensation will be a lengthy, expensive process that may not result in a fair settlement.

MOF supports the position of Weyerhaeuser and is concerned by loss of stumpage revenues and unemployment resulting from a reduction in the annual harvest due to trail preservation. MOF holds the position that the Forest Practices Code Regulations governing harvesting and management practices are adequate to maintain the integrity of the trail for purposes of recreation and ecotourism development.

The economic impacts to the Forestry Sector can be roughly quantified for the purposes of this analysis. The Sunshine Coast Trail is 180 kilometres in length. Approximately 50 kilometres of the trail lays within park, private or non-operable Crown Forest. If we assume a 100 metre buffer then there are 10 hectares of forest reserve for every kilometre. Therefore approximately 1300 hectares of forest will be impacted by the creation of a Sunshine Coast Trail Buffer.

If the average growth for the area is estimated at 6 metres per annum then the annual reduction in harvest can be obtained by multiplying 1300 hectares by 6. Therefore, a buffer along the Sunshine Coast Trail will reduce the harvest in Powell River by approximately

7,800 cubic metres annually. The gross economic value of this harvest is approximately \$800,000 per annum.

According to PRPAWS' literature the trail will generate gross revenues in excess of the \$800,000 now generated by harvesting activities. They argue that the forest recreation industry will create an adequate tax and revenue base that can be drawn upon to compensate Weyerhaeuser and other affected tenure holders, citing statistics for the tourism industry that show economic returns in excess of the forest industry extraction.

Obviously there is disparate data regarding the economic values of the resources of the trail and there is a need to reconcile these two positions. At issue is the ability to develop a sound initiative for marketing the trail. PRPAWS points out that investment in infrastructure and support is predicated upon certainty and at this point in time there is no strategy in place for the trail and therefore uncertainty is present. With a predictable, clearly-established management strategy for the trail, an accurate marketing strategy can be enacted.

Recommendations

A management agreement must be mediated between MOF and the Sunshine Coast Trail Committee. The results of this process should include agreed measures for trail management. It will be assumed that the existing forest tenure holders will be represented at the table; however, the MOF as the primary representative of the Crown will be negotiating on their behalf. The results of the negotiations for management of the trail will result in appropriate marketing, trail development and management strategies.

Prior to initiating mediation for the preferred management of the forest resources adjacent to the Sunshine Coast Trail a data set must be established upon which discussion and strategy development could be built. The data required includes:

- An accurate inventory and valuation of timber resource values that will be impacted by trail buffering.
- A market assessment of the sensitivities of potential trail users to harvesting activities adjacent to the trail. This could be conducted by telephone survey and mail out survey of existing clients of selected travel trade businesses who offer ecotourism experiences.
- An assessment of the potential revenues to be generated from the Sunshine Coast Trail.
- A discussion paper detailing a spectrum of options for management of the forest resources adjacent to the trail. This would include clear-cut to full buffering.
- An assessment of the total harvesting chances that exist along the trail within the next 25 years.

3.2.2 Tenure options for the Crown Portion of the Sunshine Coast Trail

As discussed above, the existence of the trail as an investment opportunity is dependent upon the strength of the tenure under which it is governed. MOF has authorized the trail through Section 102 of the Forest Practices Code Act. However, a trail system that supports commercial enterprise requires a more firm footing. Alternative tenure options for the trail must be explored.

The results of the mediated forest/trail management agreement will lay a foundation for developing tenure for the trail. There is a need to assess whether the trail and the campsites should be tenured through MOF policies, whether separate tenure be sought through the Commercial Recreation on Crown Land Policy or through other alternatives for tenure such as Parks or Protected Areas.

Ministry of Forests

The trail system can remain the jurisdiction of the Forest Service. The Sunshine Coast Forest District will administer improvements. There are limits with this alternative. Security of investment in campsites, hut-to-hut recreation or other developments cannot be achieved under the current Ministry of Forests legislation, regulations and policies. Improvements and the trail will remain the domain of the province and will be open to the public and not be exclusive to Sunshine Coast Trail users.

The benefits of this process are the limited liabilities to trail managers and the Sunshine Coast Trail Committee. In addition, there is no necessary commitment to manage the trail in the long term. This responsibility will remain with the MOF.

Commercial Recreation Policies and Tenure Alternatives

The Commercial Recreation on Crown Land Policy has several instruments for creating certainty for recreation opportunities on Crown Land. The instruments applicable to the Sunshine Coast Trail development include:

- License of Occupation, Long term use of extensive area; and
- Leases, site specific use.

The License of Occupation:

Granting a License of Occupation under Section 29 of the Land Act may authorize long term use of an extensive area. A License of Occupation permits use of an extensive area of crown land for periods greater than five years. The license may also include intensive use of small areas such as campsites.

The tenure holder must produce a management plan that details the intended use of and changes to the land required for the period of the lease. There are requirements for liability insurance. The fee structure for an operation with a License of occupation is as follows:

Tenure Management Fees	\$100 per annum
Extensive Use Rental (for trail use)	Minimum \$500.00 per annum Non mechanized \$1.00/client per day
Intensive Use Rental	Minimum Rent \$500.00 per annum Minimum Rent \$100 per annum for each satellite camp/facility Improvement fees minor improvements, seasonal use: 4.5% of market value

Leases

If the Sunshine Coast Trail Committee wishes to develop lodges and hut-to-hut opportunities, this form of tenure may be more appropriate on a site-by-site basis.

A commercial recreation lease applies to a small parcel of land where long term tenure is required, where the use is intensive. The tenure holder has the right to modify land or construct improvements as specified in an approved management plan. The lease is issued where substantial improvements and investments are to be made in and on the land for permanent facilities or on small sites that are absolutely critical to the operation.

The term of the lease is 20 years replaceable every 5 years. The lease requires a management plan for the development and management of the land. The fees required for a lease are as follows:

Intensive Use Rental	Substantial Improvements year round use: 8% of Market Value Minor Improvements seasonal Use5% of Market Value
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Parks

Alternatively, the trail could be designated Protected Area and managed by the Ministry of Environment Lands and Parks (MELP). Investment in and management of the trail would be developed through contracts and co-management agreements with MELP.

There are definite limits to this process. MELP and the Province are close to completing the Lower Mainland Protected Areas Strategy (PAS), and reopening the PAS to establish an additional Protected Area is not likely.

This list of tenure options may not be exhaustive, however, the range of tenure security options is covered. The level of intensity of marketing and development of the trail will require the appropriate tenure policy instrument.

Recommendations

- Following the establishment of a management agreement for the trail, the committee should determine the appropriate tenure instrument for the trail and the attendant camp sites. The committee should then work with the appropriate Ministry to ensure the trail application is successful.

Ministry of Environment Lands and Parks: Parks

The Sunshine Coast Trail crosses through two Provincial Parks jurisdictions. The first is the Desolation Sound Park on Malaspina Peninsula. The second area is the Protected Area surrounding the former Inland Lake Forest Recreation Site and Confederation Lake.

There is no inherent conflict between MELP and the Sunshine Coast Trail. However, to date, no agreement has been formally developed between PRPAWS and MELP for the Sunshine Coast Trail.

One particular issue at hand is the creation of the newly formed Inland Lake Confederation Lake Protected Area. To date MELP has not developed a management plan for the protected area.

MOF currently manages the Inland Lake site under a transition agreement. The Sunshine Coast Trail should be integrated into the future management plan of the Inland Lake/Confederation Lake Park.

Recommendations

The Sunshine Coast Trail Committee and MELP need to formalize the following:

- Location of the trail in Provincial Parks;
- Tenure agreements for the trail in Parks;
- Create Signage for the Trail in the Parks, and;
- Create management plans for the trail where it crosses Provincial Parks.

Powell River Regional District Parks

The Sunshine Coast Trail crosses Haywire Bay Regional Park. The Regional District reports that no formal agreements have been established between PRPAWS and the Regional District for management of the trail in Haywire Bay Park. The Regional District is generally in support of the existence of the trail but, they have concerns that must be addressed.

The Regional District is unsure at this point of the role the Sunshine Coast Trail proponents foresee for Haywire Bay park in the overall management of the trail. The current facilities at Haywire Park may not have the carrying capacity or the structure to accommodate a new influx of trail users. For example, if Haywire Bay Park is used as a marshalling point for the trail the increase in vehicles and the parking required may impact the current park use.

The Regional District takes the view that appropriate planning and measures must be undertaken to ensure no conflicts develop between Sunshine Coast Trail users and the current clientele of Haywire Bay Park. It is the opinion that with appropriate measures in place the Sunshine Coast Trail may augment the recreational experience of all users of Haywire Bay Regional Park.

Recommendations

The Sunshine Coast Trail Committee should work with the Regional District to outline a management strategy for the trail in development of Haywire Bay Park.

Municipal Parks and Municipal Lands

The Municipality Planning Department sees the Sunshine Coast Trail as a benefit to Powell River. They request that the Sunshine Coast Trail Committee and PRPAWS give them regular updates on intended plans and activities.

Ministry of Transportation and Highways

The Sunshine Coast Trail crosses Highways jurisdiction in several places. As well, some access points and marshalling areas utilize roads administered by Transportation and Highways (MOTH). MOTH could not be reached prior to the preparation of this report. There are several issues that must be resolved with MOTH.

Recommendations

The Sunshine Coast Trail Committee meet with MOTH to address issues such as:

- Alignment of portions of the trail crossing roads and highways administered by MOTH;
- Signage for trail crossings; and,
- Adequate design of parking in marshalling areas.

3.2.3 Private Land Interests

The Sunshine Coast Trail crosses several fee simple properties along its route. Based on analysis completed for this report the trail crosses fee simple property held by Weyerhaeuser and Pacifica Paper. The trail traverses these properties in areas where bottlenecks occur between the crown land and the fee simple properties. The two primary bottlenecks are located at the South End of Lois Lake and the South End of Powell Lake.

The trail also crosses Weyerhaeuser fee simple lots on Malaspina Peninsula, however, alternate routes for the trail can be found around these lots. The lots at Lois Lake and in particular along Powell Lake are clearly points of tension. There are no easily developed alternate routes for the trail in these locations. The trail is pinched between fee simple land and significant bodies of water. There are several points of uncertainty created by having the trail cross fee simple lands. The general concern is for the long-term development of the trail as a singular unit as opposed to several units.

PRPAWS and Weyerhaeuser have discussed strategies for allowing the trail to utilize Weyerhaeuser controlled fee simple lands. Weyerhaeuser does not object to the trail crossing its fee simple lands. Nevertheless, concerns for liability are important to Weyerhaeuser and they will be placing signage along the trail to inform people that they are entering private property and that they do so at their own risk.

On fee simple lands Weyerhaeuser will not commit to special management restrictions for the trail. They have committed to work with the trail committee to inform them of harvesting and road building activities. In addition, they will work with the Committee to provide direction in the design and location of the trail, however, Weyerhaeuser will not officially recognize the trail on its private lands.

PRPAWS has approached Weyerhaeuser in an effort to have easements established around some portions of the trail on Private Lands. Weyerhaeuser has replied that they will not commit to establishing legal easements prior to sale of their lands. Their intent is to capture the full value of the land. However, Weyerhaeuser has committed to ensuring that prospective purchasers approach PRPAWS to discuss future management options for the trail.

The complexity of having the trail situated on fee simple land has become an immediate matter for PRPAWS. Weyerhaeuser has put District Lot 4067 on the market which is located immediately adjacent to Mowatt Bay Park. The trail traverses Lot 4067 after leaving Mowatt Bay and this portion of the trail is critical as there is no suitable alternative to the Lot

4067 route. Without this passage the trail will be broken at Inland Lake and the trail users would have to travel down into Cranberry via road and then out to Mowatt Bay Park. An alternate to this would be to travel by water taxi across the lake to Schmerge Bay.

Recommendations

The Sunshine Coast Trail Committee needs to develop a process for dealing with conflicts on private property. The alternatives would include:

- Exploring liability issues when marketing a product that crosses private property without formal tenure agreements in place;
- Initiating negotiations with private landholders for informal agreements of use;
- Develop alternate courses of action for private land issues such as planning for purchase of key lots or portions of lots, for example Lot 4067 is for sale for \$150,000 and incorporating boat trips or water taxis into future planning for the trail at Lois Lake and Powell Lake (This alternative if feasible may be attractive to users of the trail and be a marketing point).

3.3 Marketing and Imaging the Sunshine Coast Trail

A key to sustainability is harmony between the place, the visitor and the host community. A successful strategy is an appropriate mix of culture, heritage, recreation, nature, soft adventure, wildlife viewing and so on. The challenge is to develop opportunities to link the relevant activities and attractions into an integrated experience for ecotourists.

3.3.1 Step # 1 : Inventorying the 'Product'

First, it is important to undertake an inventory and evaluation of all the attributes of the trail (including topography, grades and levels) and its regional context, relevant to tourism. The inventory of the trail itself could readily be complimented by the Powell River Tourism Study recently completed in August, 1999). These attributes provide the basis for packaging the trail and the region for the ecotourist, and to best understand the trail's strengths and weaknesses, and build upon the trail's assets.³¹

Attributes include:

- Attractions and activities
- Access to the trail
- Accommodation and hospitality services
- Advertising and promotional activities

³¹

Trails & Tourism: A Manual for Developing and Managing Sustainable Tourism on Recreational Trails, Beth Bengert and John Marsh, Trent University April 1996

- Community and regional infrastructure

Attractions and Activities

The first thing to inventory are the attractions and activities, things that draw a tourist to an area, things for the tourist to see and do, i.e. the trail. Things to consider are:

Natural	Geological, topographic features, hydrology, rivers, lakes, waterfalls, wetlands, vegetation, wildlife, scenic vistas
Cultural	Archaeological sites, native heritage, historic sites, cultural events, educational events, sporting events.

Consideration must also be given to other attractions that exist or special events that occur in the region that attracts tourists. It is important to inventory these as there is the possibility of partnerships between the trail and these other sites.

Access to the Trail

Easy access to the region and to the trail itself is key to drawing tourists and to ensuring repeat tourists. Transportation facilities and services, the means to get tourists to the site, must not be overlooked. Access issues include:

- Number, location and visibility of access points.
- Road access.
- Public transportation.
- Access for disabled.
- Distance from major population centres.

Accommodation and Hospitality Facilities

It is essential to have a clear idea of the quantity and quality of hospitality facilities and services that provide for the needs of the tourists while visiting the trail. It is important to consider:

- Hotels, motels, lodges.
- Hostels, cabins.
- Bed and breakfasts.
- Campgrounds.
- Seasons available.
- Costs of accommodation.

Advertising and Promotional Activities

Another component to be inventoried is the currently available promotional and tourist information services, things that draw the tourist's attention to an area. Areas for consideration are:

- Printed materials - brochures, guidebooks, maps.
- Advertising - local, regional, provincial, national tourism brochures, vacation guides, magazines, newsletters.
- Media attention - radio, television, video.
- Internet presence - website, links to regional associations and other attractions.

3.3.2 Step # 2 : Marketing Strategies for the Sunshine Coast Trail

Positioning the Sunshine Coast Trail in the Minds of Tourists

It is important to create a unique image for the trail that will set it apart from others and will affix the trail in the minds of the market. There must be something unique that the tourist will experience on the trail that they will otherwise miss out on if they travel somewhere else. Some of the trail's (and the regions) characteristics that can be utilized in packaging the image of the Sunshine Coast Trail include the following:

- 'Pristine', 'untouched areas of wilderness' are popular with ecotourists;
- Diversity of the landscape over the extensive trail network;
- Varying degrees of difficulty, something for every hiker; and
- Hike 'a new trail a day', and never see the same tree twice !

Printed Materials

Materials such as brochures, guidebooks and maps are effective for promoting a trail if they are easy to read and understand, look professional and reflect what is actually offered by the trail. This material may be all that the tourist has to assess the Sunshine Coast Trail.

Things to Consider When Creating Printed Material for Trail Promotion

- Has the market been clearly identified?
- Has the material from competitors been surveyed?
- Will the material compete effectively and stand out from the others in some way?
- Have distribution methods and requirements been determined before creating the design and deciding how many to print i.e. display in travel agencies, Chambers of Commerce or for direct mail?

- Is the size appropriate for the method of distribution (will it fit in a display rack or in an envelope)?
- Does the cover identify a benefit - visually or through a key word or phrase?
- Does the printed material reflect the true image of the Sunshine Coast Trail?
- Is there continuity among all the printed material - design, colour, logo, positioning statement, overall impression?
- Does the colour scheme appeal to the audience?
- Are all the facts presented with a focus on uniqueness?
- Are the headlines and captions written well?

Advertising

There are a number of avenues that can be pursued for advertising the Sunshine Coast Trail. Advertising in the travel sections of newspapers and magazines will prove to be expensive and may not be the most efficient use of promotion dollars. However, by choosing a few key magazines that cater to the target market, the specific market can be reached with less money spent.

Media Attention

There are very few trail organizations that can afford paid advertising in the media; however, there are other ways to gain media exposure. Press releases regarding upcoming special events and human interest spots on local television and radio can be effective. Consideration can be given to making a video about the trail that the media could use.

Multi-Trail Marketing

Not only does the Sunshine Coast Trail offer a diverse array of trails and topographies, but it can also be marketed in conjunction with the host of other regional trails, including the Back Country and Front Country Trails, which already support hiking and biking activity.

Internet

The Sunshine Coast Trail already has a presence with a web page and links through several other pages. This can be expanded by establishing links with other local tourism

operators who have existing pages, as well as regional tourism associations, outdoor publications and other trails across Canada.

To effectively deliver on this, the organization needs to utilize the ongoing services of a Webmaster who will:

- Maintain the trail in the high priority callbacks / searches within all major search engines establish and search out new links with outdoors clubs and organizations;
- Offer articles to be published in electronic newsletters;
- Access any and all free promotional advertising;
- Utilize latest technologies such as 'Flash' to build a highly visual, animated and attractive site;
- Monitor visitors to the site;
- Manage information feedback to inquirers; and
- Monitor other similar sites and learn from any effective strategies they develop, and apply same to the site.

Public Relations

Someone in the organization should be appointed to deal with public relations. Trail organizers can get involved with a movement that is afoot in the community, region or even nationally. The Trans Canada Trail is an exciting opportunity for the trail to piggy-back on existing promotional activities.

Furthermore, free editorials submitted to and appearing in outdoors journals, newsletters and magazines are even far more effective than advertising. The PR function would include a constant and diligent effort to appear in the media spotlight as often as possible, including overseas travel media. Inviting and hosting outdoors travel writers and photographers should be encouraged.

Ambassadors

Every resident and every organization must be encouraged to become an ambassador for the trail, and the region itself. Word of mouth, both on a personal and professional contacts basis, is an exceptionally powerful marketing tool.

Personalities

High profile personalities are successful in drawing attention to an event, place or cause. If feasible, such an individual should be identified and encouraged to act as a spokesperson for the trail, thereby facilitating media awareness and coverage.

Endorsements

Any and all recognized certifications and designations should be sought. The ecotraveller, particularly those not familiar with the Sunshine Coast Trail, will look first to who condones and endorses the trail itself.

Multipliers

There are a series of multipliers to be approached, i.e. those who do not use the trail themselves, but can influence others to do so.

- Canadian, US and overseas tour packagers.
- Foreign tour packagers based in Canada.
- Clubs and outdoors organizations.
- Wilderness groups.
- Outdoors travel agents.
- Mountain co op chains, retailers and clubs.

Coat - Tailing Existing Marketing

A cost effective marketing tool is including the Sunshine Coast Trail as part of existing tourism marketing initiatives, including, but not limited to the following.

- Tourism BC.
- Foreign Canadian consulates.
- Regional advertising.
- Encouraging every existing hotel, motel and tour operator in the region to also market the in their literature, on their sites (links), hard copy brochures at their facilities, etc.
- BC based publications that promote tourism.
- Liaison with Tourism Vancouver, and Vancouver Island Tourism (Victoria).

Joint Event Packaging

Wherever feasible, local tourism operators (including marine based tourism companies) and service providers (i.e. hotels, regional airlines , bus lines, etc.) should offer combination packages that include trail use as part of the package. For example :

- Sail and hike vacations.
- Hotel stay and guided trail walks.
- Fly in trip to Powell River and trail hikes.
- Golf and hike (or kayak and hike) vacations.
- Wilderness and wildlife viewing and hiking.

Multi Use Marketing

In a similar light to the preceding item, it is conceivable to market the Sunshine Coast Trail as a unique 'Integrated Recreational Resource'. This would also be part of the image of the Sunshine Coast Trail. These could include:

- Wilderness camping, hiking and kayaking.
- Hiking and equestrian activities (i.e. Ranch 41 or Truebridge).
- Fresh and saltwater kayaking.

Passport to the Sunshine Coast Trail

The high number of trail access points makes it extremely difficult to collect user fees. Most existing trails such as the West Coast Trail can easily charge user fees as there is a readily defined entrance and exit to the trail. This is not the case for the Sunshine Coast Trail.

Developing a Passport could integrate a user fee into the cost. The Sunshine Coast Trail passport would include detailed trail maps and sightseeing highlights, safety information, souvenir badges or pins, and a host of coupons from local hotels, restaurants, car rental, other tour (marine and land) operators, and suchlike.

The Passport would, hopefully, be marketed at every outlet in Powell River that caters to visitors.

One product within the Passport can be a **customized phonecard** (\$10, \$25) with a photo of the trail on it. Each time the phonecard is used, both locally and when the visitor returns home, there would be a 'reminder' promo for the trail. Furthermore, the phonecard can be programmed with a built in 'hot button' feature that could quickly connect the user to the Visitor Information office or the Sunshine Coast Trail office.

Events

Events draw visitors and command media attention. A concerted effort should be made to plan a number of special events for the Sunshine Coast Trail that are also compatible with the image of the trail. This might even entail hosting an event that revolves amongst established trails throughout North America.

First Nations / Heritage

There is a strong appeal amongst ecotravellers to participate in, or view Aboriginal culture and history. There exist such opportunities within the scope of the and this Native theme can be carried through into the marketing and imaging of the trail.

Opportunities for the Sliammon First Nation to be an active player in the trail include the following opportunities.

- The Longhouse at Okeover Inlet
- Operating a fleet of canoe and kayak rentals
- Guided tours
- Access to oysters and salmon streams
- Cultural events
- Facility rentals at Sliammon Lake or Little Sliammon Lake

Host a 'Work Party'

Every year, the Washington Trails Association hosts a number of 'cheap vacation' work party weeks. For a fee paid by participants, volunteers are housed, fed and carry out volunteer trail building and maintenance. This 'Tom Sawyer' type activity is well attended. It has been found that these people become regular trail users as they have adopted the trail as their own. This helps build a loyal following who, through word of mouth, encourage others to visit.

Joint Marketing of ALL Regional Trails

The Sunshine Coast Trail can be marketed as a complex of trails together with all the other fine trails that exist in Powell River. The initial starting point for this alternative marketing strategy is the fact that there are 36 trails mapped and routed in the Powell River Region. Consequently, the infrastructure exists to support this plan.

The Powell River area has three distinct trail experiences. The overall marketing strategy would be to emphasize all the options that are available as opposed to focusing on one opportunity. It is this variety that makes Powell River unique. These trail complexes can be roughly characterized as front country bike and hike experiences, the mid-country Sunshine Coast Trail complex and the Backcountry Sub-Alpine and Alpine systems.

Each opportunity will provide users with a different experience. The front country recreation provides day use for people who want to experience the area without the commitment of carrying several days worth of provisions. As well the front country offers some excellent mountain bike experiences. The Sunshine Coast Trail gives people the opportunity to do extended hiking through a variety of forest types with peak elevations in the 1,300 meter range. This is an excellent opportunity for the eco-tourists seeking extended trips through wilderness.

The backcountry is for the alpine seeking ecotourist. The trail system is not as extensive as

the Sunshine Coast Trail. However, there are excellent opportunities for the adventure seeking hiker. In this system the hiker has the opportunity to stay in cabins provided by the

There is an advantage to marketing a package of trails for Powell River as opposed to focusing on one trail to the exclusion of all others. The overall marketing strategy gives people the impression that they need several visits to Powell River to satiate their desires. They always feel there is something more to do. A desire will be created to come back and explore the trails they missed the first year. The important aspect of this strategy is that it will create repeat clients.

The concept of a series of trails appealing to a variety of users will also broaden the market base. The approach of marketing all of the regions' trails appeals to a broader base of people. It allows people to gain familiarity with Powell Rivers broader tourism resources. Furthermore, it appeals to the need to have a wider range of experiences. If marketing focuses on one component of the overall system of trail opportunities in Powell River to the exclusion of the other components, Powell River may be foregoing additional markets and Ecotourism opportunities.

In the end, it may be the community's desire to widen the marketing strategy resulting in increased use.

Conclusion : The Need for a Proactive Marketing Organization

The marketing strategies developed and presented herein are diverse and most viable, well suited for the Sunshine Coast Trail. That having been said, designing, developing, implementing, following through, and monitoring the effectiveness of these strategies is more than can be asked of strictly a volunteer committee.

It is recommended, and included in the operating budget within this Business Plan, to hire a Marketing Manager, or to enter into a contract with an Outdoors Recreation Marketing Organization, to develop and implement a number of these marketing initiatives. The individual or organization would be assisted by a staff of local volunteers, as well as assistance, as may be available from established regional organizations (Chamber of Commerce, Economic Development, Community Futures, etc.).

3.4 Ownership, Governance, Management, Proposed Organizational Structure and Staffing

3.4.1 Ownership

- It is proposed that the trail ownership be under the auspices of a newly formed Sunshine Coast Trail Non Profit Society that would replace PRPAWS. The objective would be starting with a 'clean slate'.
- Ownership would encompass any and all rights, licenses, permits, letters of intent, fixed assets and other such documents and assets that, in any way, are representative of the rights of the Sunshine Coast Trail.
- The new Society would include, as shareholder members, any and all key groups involved in and due an ownership and governance position in the trail, i.e. government, private sector representation, Community Futures, etc.
- Should ownership of any component not be transferable, then the ownership of the trail can remain under PRPAWS, assuming that the current structure of the society can accommodate an expanded stakeholder base and that PRPAWS has no outstanding legal or liability issues that might impinge upon the successful functioning of an ownership structure.

3.4.2 Board of Directors

- The Board should encompass representation from Ministry of Forest, Ministry of Environment, Forestry stakeholders, PRPAWS Executive, Sliammon, Government (Community Futures or Economic Development) and the representation from the Business Community, including the outdoors tourism / ecotourism sector.
- It is recommended that the Chairperson be selected for his / her high profile both within the community and outside the community. This will help lift the profile of the trail in the marketplace , facilitate with media and public relations attention, and benefit key activities such as funding and awareness building. It is conceivable that the Chair can be from outside the region if his or her position is deemed to be most beneficial to the growth and well being of the initiative.
- The Board of Directors is responsible for all decision making and policy setting for all matters concerning the organization.
- The Board sets the direction for business planning and members can be elected for overlapping terms based upon representative stakeholder involvement.

- The Board will conduct the election of officers and participate in committee activities.
- Meetings every four months is mandatory.

3.4.3 Visioning Committee

- Selected from the Board, and calling upon input as required, the Visioning Committee will concern itself with 'big picture planning' and long term issues that could be either beneficial or detrimental to the trail.
- The committee will commission, as may be required, studies, reports, impact analysis, policy development and other expert opinions and assessment as may be required from objective, outside parties.
- Any action planning items that result from the work of this committee will be assigned downstream to any of the cornerstone committees of the trail governance hierarchy (i.e. Finance, Marketing, Maintenance, Safety and First Nations).

3.4.4 Executive Director

- This full time paid position is responsible for directing all day-to-day activities of the organization including:
 - management of office;
 - preparing grant applications;
 - directing support staff;
 - following policy director;
 - liaison with members; and
 - answering membership requests;
- Responsible for liaising and working with all civic and government agencies relative to trail development and utilization in the context of integrated resource management. Also ensures that the organization's objectives and practices are in line with government policies, especially as they relate to resource management on public lands.

3.4.5 Finance and Budget Committee

- Responsible for maintain annual budget projections for all activities, preparing budget updates, setting market pricing, applying for grants, deal with liability and legal issues, soliciting donations and formulating equitable formulae for disbursement of funds.
- A key factor in the financial well-being is a scrupulously crafted 'Revenues Generating Program'. This report specifically includes a chapter on 'Revenue Stream Creation' that examines a host of activities, including, but not limited to grants, foundation funding, corporate sponsorship programs, tourist tax collection, fund-raising events, membership drives and other viable options. A **Revenue Creation Committee**, working directly under the Finance and Budget Committee, will focus specifically on these critical fund-raising opportunities.

3.4.6 Marketing and Public Relations Committee

- Responsible for advertising, maintaining trail user statistics, monitoring, membership surveys and trail use surveys.
- Responsible for development and implementation of seminars, training programs, annual conferences, newsletters, membership pricing structure and gaining new members.
- Plays a critical role in the following : ³²
 - Designing and carrying out promotional and advertising campaigns.
 - Coat-tailing all existing provincial and government marketing initiatives, literature, marketing at the foreign consulate levels, trade missions, trade shows and others.
 - Design and carry out high profile and profit-oriented events surrounding the trail.
 - Media liaison and public relations.
 - Establish and maintain liaison with national and international tour operators, packagers , outdoors clubs, outdoors organizations that distribute newsletters to their membership, and other multipliers who can help deliver the message of the trail.
 - Design and maintain maps and information kits.
 - Attempt to encourage feature film making on the trail, thereby increasing public awareness.

³² See 'Marketing the Trail' for additional details and Marketing Strategies under the auspices of the Marketing Committee

- Work to identify and host events, competitions and the involvement of high profile persons.
- Maintain a website that is constantly upgraded with news, events and promotional initiatives. This would also include assuring links with as many other websites, including but not limited to, outdoors gear sellers (i.e. Mountain Co op), outdoors organizations (i.e. Sierra, Western Wilderness), clubs, government tourism sites, and any other identified sites group where those same site visitors would be interested in the Sunshine Coast Trail. This activity would be optimized using the ongoing professional services of a Webmaster.

3.4.7 Maintenance Committee

- This committee would deal with critical issues regarding trail maintenance, upgrades, dealing with trail workers and volunteers, manpower funding, health, environment and liaison with the forestry community.

3.4.8 Safety

- Dealing with all aspects of safety and security, including working with Search and Rescue to develop policies and contingency plans in the event of difficulties encountered.
- Develop and maintain safety - related materials for distribution to trail users.
- Trail signage.

3.4.9 First Nations

- The trail has the opportunity to benefit from the ongoing involvement of the Sliammon First Nation. Aside from human resources and potential funding opportunities resulting from Sliammon involvement, there are other marketing and theme-related potential opportunities to be considered. These would include themed events, heritage tourism, visiting traditional Sliammon sites along the trail route, and others.
- The purpose of this committee would be to maximize potential opportunities and benefits from the involvement of Sliammon in the trail venture.

insert org chart here

3.5 Trail Development : Capital Costs

3.5.1 Phase Two

Upgrading and Campsite Development

A series of upgrades are required along portions of the trail to bring it up to grade. The upgrades include:

- Widening portions of the trail
- Leveling the surface
- Building steps in steeper portions
- Improving markers
- Installing signage and milestones

In addition, a 10 km portion of the Tin Hat section of the trail needs to be rerouted to improve hiking opportunity. Campsite development will be required for this phase of the project by creating and upgrading 17 campsites as follows.

Each campsite will require:

- Picnic tables;
- Tent pads (wooden structures to put tents on);
- Outhouses; and
- Water supplies if possible

Following this development, routine maintenance will be undertaken annually.

Budget Phase 2

1. Upgrading Trail System	
a) Labour Crew of 4 @ \$700 per day for 100 days	\$70,000
2. Developing Campsites	
b) Labour Crew of 4 @ \$700/ day, 3 days per site	35,000
c) Materials and costs	50,000
3. Overhead and Operating Expenses	
d) Transportation (Vehicles, Trucks, quads,)	7200
e) Communications, Equipment and Tools	2200
Total	\$169,400

Annual Routine Maintenance for Phase 1	
--	--

Crew of 4 @ 700.00 per day 40 days	28,000
Total	28,000

Employment

Phase 1 of the trail will create 150 person days of labour. This work is generally considered labour. There will be a need for the crew to have basic carpentry skills and be familiar with the operation of power saws. One person on the crew should have supervision and small business coordination skills.

3.5.2 Phase Three

Development to Hut-to-hut Recreation

The next phase in development of the Sunshine Coast Trail is to develop hut-to-hut hiking. The primary costs in this process are the building and maintenance of the hut/lodges.

The intent would be to initially have the huts as self contained units that are similar to the operations of Confederation Lake or Emma Lake. The primary costs are routine maintenance and clean-up. The goal is to have these facilities developed into staffed facilities with complete amenities.

Budget

1. Building Cabins per cabin	
a) Labour Crew of 4 @ \$700 per day for 16 days	11,000
b) Materials	24,000
2. Maintenance annual costs	
b) clean cabins, routine repairs etc	3,000
Subtotal	38,000
Total for all six cabins	228000

Employment

The labour component for this phase is much more critical. The workers must be skilled carpenters. At least one person on the crew must have construction supervision skills. The total employment for this phase is 340 persondays.

3.6 Sliammon First Nation

The Sunshine Coast Trail passes through a large portion of Sliammon First Nation's selected treaty settlement lands. Sliammon First Nation is represented on the Sunshine Coast Trail Committee and in meetings has endorsed the concept of the trail.

There is potential for Sliammon to play a key role in the development and management of the trail. They have been developing agreements and positions on co-management agreements for several of the resources in their territory. There is opportunity for Sliammon to play a lead role in such areas as management of the Inland Lake Protected Area. Sliammon could bring a vital cultural component to the trail. Evidence of traditional practices are located along the Malaspina portion of the trail. Bark stripping for bailers and other uses have been undertaken on cedar trees along the trail.

The existing cultural uses of the resources along the trail could be incorporated into the general management plan for the trail. They could be used as educational components in the overall trail experience. The incorporation of these uses in the trail promotional material may serve to increase Sliammon's overall status in the region as the true stewards of the resources.

Furthermore the trail can be used as an economic opportunity for Sliammon people. For example, a Sliammon based tourism firm is offering packages that include cultural awareness. Opportunity exists for this firm to utilize the trail in its marketing and promotion. Proper development of the trail could foster the growth of a such a firm and other firms in Sliammon.

Recommendations

Sliammon First Nation should play a key role in future development of the trail. The Sunshine Coast Trail Committee should continue to work with Sliammon. Sliammon should be given opportunity to take a lead role in the business development and other economic and job initiatives resulting from the trail development.

The Sunshine Coast Trail Committee should develop protocols and tenure agreements with Sliammon First Nation for security of the trail in a post-treaty environment. These agreements should be created before treaty is settled so there is a smooth transition into the new ownership of the trail resources.

There is a strong appeal amongst ecotravellers to participate in, or view Aboriginal culture and history. There exist such opportunities within the scope of the Sunshine Coast Trail and this Native theme can be carried through into the marketing and imaging of the trail.

Opportunities for the Sliammon First Nation to be an active player in the trail include the following opportunities.

- The Longhouse at Okeover Inlet
- Operating a fleet of canoe and kayak rentals

- Guided tours
- Access to oysters and salmon streams
- Cultural events
- Facility rentals at Sliammon Lake or Little Sliammon Lake

3.7 Proposed Sunshine Coast Trail Revenue Streams

A critical component of the ability of the Sunshine Coast Trail to deliver a viable and consistently excellent product to its clients, non-resident visitors and local users alike, is the ability to generate funding for both its capital costs (trail upgrading, shelters, rolling stock) and general operations, including staffing, trail maintenance and marketing and promotion.

The following “Revenue Generators” have proven successful in other outdoors / trail initiatives, and have been selected as appropriate for the Sunshine Coast Trail.

The Organizational Structure Model developed within this Business Plan calls for a ‘Revenue Creation Committee’ to be established under the guidance of the Finance and Budgeting Committee. This reiterates **the importance of designing, implementing and maintaining dependable revenue streams to assure the fiscal well-being of the initiative.**

It is generally felt that, with a focused, proactive campaign regarding revenue stream creation, the Sunshine Coast Trail will be capable of generating sufficient funds to meet its needs. It is also assumed that cost control and budgeting will remain of prime importance.

The most viable revenue generating activities are depicted in the chart below, and are designated as being targeted towards ‘Capital Costs’ or ‘Operations’, or both.

Revenue Generating Activity	Capital Costs	Operations
Labour employment and training subsidies, including using displaced forestry workers, First Nations, youth and disadvantaged peoples.	x	x
Infrastructure development grants, and grants to build a volunteer community network, such as those grants promoted by The Ministry of Community Development, Co operatives and Volunteers.	x	x
Two percent (2%) tourist tax.	x	x
Sale of Sunshine Coast Trail Passports and kits. Advertising space for local firms can also be sold within the context of the Passport. Custom Phonecards can be part of the package as well.		x
Along with Sunshine Coast Trail Passports, consideration can be given to selling ‘Eco Stamps’ similar to ‘Chinook Conservation Stamps’ sold with fishing licenses.		x
Cabin Rentals @ \$ 55/night		x

Revenue Generating Activity	Capital Costs	Operations
Other Sunshine Coast Trail merchandising.		x
Corporate sponsorships.	x	x
Programs where shoppers at Eddie Bauers or Mountain Co ops contribute \$x for every 'foot of wilderness preserved' on the trail.	x	x
Society Membership drives, with various levels of membership, from personal to group or corporate.	x	x
Leasing sites along the trail to private enterprises who would develop Society approved ventures to service trail users.		x
Fundraising programs such as The BC Municipal Bond Authority or the Community Venture Capital Corporation Program (Ministry of Community Development).	X	
Licensing the Sunshine Coast Trail name and logo for merchandising.		x
Donations. These can be collected at high-traffic points amongst retailers and trail service providers.		X
Casinos, lotteries and raffles are successful fundraising venues and garner substantial community interest.	X	x
'Fund a Foot, Build a Legacy' fundraising campaign used successfully in the U S to entice private and corporate contributions for capital costs / trail enhancements.	X	
Interpretive and educational services, guided tours		x

Recommendations

The immediate creation of a permanent or interim Revenue Creation Committee as part of the trail's overall organizational structure. The committee should be comprised of accounting and legal presence, as well as fundraising, marketing and government funding procurement expertise.

Review the budgets and proformas presented herein to better quantify and understand the financial needs of the trail (capital and operating costs).

Carry out discussions on the identified revenue streams and prioritize which venues the committee is most comfortable working to implement.

Work to garner community, government and funding source support from key players who can assist in the realization of each fundraising activity selected.

Assignment of specific responsibilities to committee members, and diligent followup on progress.

3.8 Sunshine Coast Trail Budget and Proformas

3.8.1 Conclusions

The Sunshine Coast Trail can be operated at a marginal cash surplus, but will necessarily rely reasonably heavily on membership fees collected (Founder, Corporate and Personal), labour subsidies for construction and maintenance, labour from a dedicated pool of volunteers, and donated supplies for construction and maintenance.

Taking a conservative stance and perspective, it is not assumed that the revenues generated solely from the activities of the trail (trail use fees, cabin rentals, etc.) will sufficiently cover the capital / construction and operating funding needs of the trail.

Trail use fees sold through Passports / information kits will not be mandatory, nor will all trail users purchase them. Numerous trail access points somewhat undermines the ability to flag and impose user fees on all trail users. Furthermore, it is also worth noting that the cabins proposed for the trail may be competing directly with a number of operating lodges and bed & breakfasts located along the trail. This may even cause difficulties in maintaining the support of the ecotourism / accommodation business community.

Substantial work has been done to design and build the trail to its current status. With a proposed concerted marketing and promotional effort it is conceivable to bring the annual trail user traffic to 4,250 within five years. Attracting users / visitors will be a keynote challenge. The Powell River region has just over 100,000 visitors of all types annually, while the Sunshine Coast Trail currently hosts under 500 users. By contrast, the well established, well known West Coast Trail hosts 10,000 users annually from amongst the two million who visit the west coast of Vancouver Island. This further explains our recommendation to bring a full time Marketing Manager on board from the very onset, working with a reasonable marketing budget.

A review of the various costs and anticipated revenue streams as presented herein indicate that the Sunshine Coast Trail is a viable initiative that shows great promise for the Powell River Region. The key to success will be to muster the support, interest and participation of the various revenue-generating players and components as designed into the Proforma Budget.

Certain other funding avenues such as Tourist Tax, Merchandising, Leasing Sites and Legacies have been omitted from the anticipated fund revenue generating pool. The determination of revenues from these sources is speculative at best. That, however, does not preclude considering these venues in the future.

3.8.2 Assumptions

One Season for the Sunshine Coast Trail's operation represents six calendar months only. Each column in the Proforma Budget represents one half of one season (i.e. first half of Season 1, second half of Season 1, etc.). Therefore, each column represents a three month calendar period. There are no expenditures or overheads anticipated for the six month period of 'off-peak' season of each year.

Item	Assumptions
CAPITAL BUDGET	
Upgrading Trail System	\$ 70,000, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , all completed within the first two years of operation.
Developing Campsites	\$ 85,000, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , all completed within the first two years of operation.
Cabins	\$ 35,000 each, as per <i>Chapter : 'Trail Development : Capital Costs'</i> , built at the rate of two cabins per season commencing in year three of operations. By the end of five years, there would be six cabins in operation. Payback is seven years per cabin, based on revenue projections and construction costs.
OPERATING BUDGET	
Executive Director	Part time until year five, at increasing levels of employment. Full employment rate at \$ 40,000/year, or \$ 20,000/ season.
Marketing Director	Full employment at \$ 35,000/year from the beginning, or \$ 17,500 per season.
Part Time Staff	Commences at marginal part time employment, increases to \$ 12,000/year (or \$ 6,000/season) by year five.
Office, Rentals	No overheads anticipated until year two, after which point the expenditures increase gradually and peak at \$ 6,500/year (or \$3,250 per season) in year five.
Communications	Increases from \$ 1,500 / season in year one to \$ 2,500 / season in year five.
Website and Webmaster	Intensive involvement at onset of the project (\$ 30,000/year, or \$ 15,000/season), decreasing to \$ 15,000 / year (or \$ 7,500 per season).
Marketing Expenses	A significant operating cost at \$ 15,000/season in year one, increasing to \$ 20,000 / season in year five. This encompasses the printing and distribution of brochures and info kits, advertising and proactive marketing forays and strategies into target markets.
Travel Expenses	Increases from \$ 1,000/season in year one to \$ 3,000 in year five.
Insurance	\$ 750/season for liability insurance.
Office Equipment,	Increases from \$ 700/season in year one to \$ 1,500 in year five.

Item	Assumptions
Copying	
Legal and Professional	\$ 750/season, assuming volunteered time from professionals.
Transportation and Communications	Specifically trail maintenance costs increasing to \$ 9,000/season in year five, as per <i>Chapter : 'Trail Development : Capital Costs'</i>
Trail (and cabin) Maintenance	Labour costs, as per <i>Chapter : 'Trail Development : Capital Costs'</i> . This cost represents \$ 28,000/season once the trail upgrades and campsites are built (latter half of Season Two). Once the cabin building commences in Season Three, an additional \$ 3,000/cabin/season is added to the maintenance costs. For example, the latter half of Season Five has a Trail Maintenance Expense of \$ 23,000, as represented by \$ 14,000 for trails and \$ 9,000 (6 x \$ 1,500) for cabin maintenance.
<i>Note :</i>	<i>There has been no provision included herein for any possible fees and right of ways payable to landholders and First Nations where the trail traverses these properties.</i>
REVENUES	
Founder Memberships	This category shows the cumulative number of key, early stage corporate membership from major businesses in the region. The revenue from same, at \$ 1,000/season, is shown in 'Founder Membership Fees'.
Corporate Memberships	Highlights the anticipated number of cumulative corporate and professional sponsors / members. The revenues from same, at \$ 200/ season, is shown under 'Corporate Membership Fees'.
Personal Memberships	Highlights the anticipated number of cumulative individual sponsors / members. The revenues from same, at \$ 25/ season, is shown under 'Personal Membership Fees'. In all of the above memberships, there is an attrition factor in that new members will replace those exiting members. Further, the collection of fees is split between each half of each season. For example, thirty corporate members in Season 1, @ \$200 = \$6,000, with half collected in the first half of the season, the balance in the second half.
Trail Use Visitor Traffic Projections	Year One 1,500 Year Two 2,250 Year Three 3,000 Year Four 3,750 Year Five 4,250
Number of Cabins	Two cabins are expected to be built every season, commencing in year three. The revenues derived from same appear under 'Cabin Rentals'. The following assumption has been made for revenues;- \$ 55/night/cabin, x 180 days/season x 50% capacity utilization x number of cabins. This represents revenues of \$ 5,000/cabin/season. Each cabin, costing \$ 35,000 to construct, has a seven year payback.

Item	Assumptions
	It is noteworthy to repeat some concern that these cabins will compete with established lodges and bed & breakfasts already existing and operating along the trail, and would discourage the establishment of new private sector operations providing similar facilities.
Donations, Passport Sales	Trail use visitors anticipated x \$30/user x 70% (with numerous access points, not all trail users will be obliged to purchase 'Trail Passport' kits).
Labour Grants and Subsidies	Trail and Campsite construction ;- six jobs x \$15,000 x 50% Cabin construction ;- three jobs x \$15,000 x 50% Training would be integrated into these activities.
Donated Supplies	Estimated at \$5,000/cabin.
Infrastructure Grants	Provision for procurement of same during seasons one and two.
Fundraising	This will be an important funding activity and can represent raffles, special events, casinos, lotteries and any other viable annual activity.
Volunteer (In Kind) Labour	This represents a strategic component of trail building, campsite construction, cabin construction and trail maintenance. All trails throughout the world have a strong network of volunteers to draw upon.

Insert #s

Insert #s

3.9 Economic Benefits Analysis

3.9.1 Visitor Traffic to Powell River

Currently, Powell River visitor inflow amounts to 67,000 to 150,000 people annually³³. This encompasses commercial and other traffic. The specific percentage of tourist visitors is not precisely known.

3.9.2 Trail Usage

Currently, the Sunshine Coast Trail hosts approximately 500 visitors per year, although there is little actual traffic monitoring carried out.

In setting the 'outside parameters' of the Sunshine Coast Trail, it is viable to use the West Coast Trail as an upper yardstick. The West Coast Trail is of international caliber and reputation, well established, has historical data on usage and, despite dissimilarities in topographies, location and offerings between it and the Sunshine Coast Trail, it can be a reasonable role model for the Sunshine Coast Trail visitor level targets. The West Coast Trail hosts approximately 10,000 visitors annually.

It is logically anticipated that user traffic increases over a period of time, as the Sunshine Coast Trail becomes better known, more marketing is carried out, awareness building reaches new user groups, word of mouth increases interest and activity, and so on. As such, the potential economic benefits to the region, as depicted below, are shown in chart form, with benefits accrued to anticipated rising levels of trail user traffic (i.e. 1,500/year, 2,500, 5,000, 7,500, and 10,000).

Total potential economic benefits for the region were calculated from two vantage points.

- Westland Resource Group's 'North Coast Trail Socio Economic Impact Assessment', (March, 1996) carried out extensive statistical analysis. The conclusion was that 7,200 trail visitors / year would produce \$ 865,000 in economic benefits for the region. Extrapolated, that represents \$ 120 per visitor / trip.
- Extensive role modeling carried out for this Sunshine Coast Trail Business Plan (see *chapter 'Economic Role Modeling' in this Business Plan*) clearly indicates that trail

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Powell River Tourism Report, PriceCoopersWaterhouse, Aug/99

users spending benefits the region at a rate of \$ 49 to \$ 60 / day, with average stays being three days. That represents \$ 147 to \$ 180 per visitor per trip.

- Therefore, the calculation of economic benefits below utilizes a median average of \$ 149 / visitor per trip.

<i>If the Sunshine Coast Trail Hosts.....</i>	<i>.....then the Economic Benefits to the Region can Represent....</i>
1,500 visitors annually	\$ 223,500
2500	\$ 372,500
5000	\$ 745,000
7500	\$ 1,117,500
10000	\$ 1,490,000

3.9.3 Job Creation Potential

Assumptions

The Powell River region has a Tourism Multiplier of 2.38, as assigned by Gary Horne’s 1996 ‘Community Dependency Ratios report. For every direct tourist-related job created, the total impact of tourist jobs created is 2.38. This includes indirect jobs supporting direct tourist employment, trickle down effect of suppliers to suppliers (induced effects), and so on.

Economic trail role modeling (*see chapter ‘Economic Role Modeling’ in this Business Plan*) demonstrates that, for every 1,000 trail visitors / users, there are 3-5 private sector direct tourist jobs created. This includes new ventures (guiding, lodging, equipment rental, facilities, transport, etc.) as well as increased employment in existing businesses to support the increased activity. For purposes of this analysis, we have used the lower index of 3 new direct private sector tourism jobs / 1,000 trail visitors.

The Sunshine Coast Trail itself will call for the creation of several part time and full time jobs, including an Executive Director, a Marketing Manager, staff and trail maintenance

personnel. For purposes of this analysis, we have utilized .5 jobs created for every 1,000 trail users. This applies equally for Administration / Marketing and Trail Maintenance.³⁴

Incorporating the above assumptions into a Job Creation Model, the chart below highlights the results.

Potential Job Creation

<i>If the Sunshine Coast Trails Hosts.....</i>	<i>.....then Job Creation in the Region can Represent....</i>
---	--

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Logically, a peak of 5,000 trail users annually would call for 2.5 jobs, i.e. an Executive Director, a Marketing Manager and a part time support staff. Further, 5,000 would call for 5 part time (seasonal) trail maintenance workers, equating to 2.5 full time jobs.

<i>If the Sunshine Coast Trails Hosts.....</i>	<i>.....then Job Creation in the Region can Represent....</i>
1,500 visitors annually	14.28 ³⁵
2500	23.8
5000	47.6
7500	71.4
10000	95.2

3.9.4 Other Potential Economic Benefits

- Federal and Provincial taxes (GST, PST) will be generated on the economic benefits accrued to the region. For example, 5,000 visitors may benefit the region in the amount of \$ 745,000. This represents another \$ 104,300 in GST and PST for government.
- BC Ferry Corporation and regional air transport carriers will realize higher traffic numbers.

³⁵

(.5 Administration & Marketing + .5 Trail Maintenance + 3 direct private sector tourist jobs) x 2.38 Tourism Multiplier = 9.52 direct and indirect jobs per 1,000 trail visitors, multiplied by 1.5 (representing 1,500 potential trail users)

3.10 Strengths, Weaknesses and Risks

The following represent the most predominant project strengths and weaknesses.

Strengths	Weaknesses (and Risks)
<p>The trail is already built, and PRPAWS and its volunteer network have expended years of planning and 'sweat equity' into the creation of the trail. This is not a 'project in planning', but rather an implementation project.</p>	<p>Other major trails have an already established and readily identifiable physical asset to draw on (i.e. Westcoast Trail has Pacific Rim Park, Eastcoast has Appalachian Trail, etc.). The Sunshine Coast Trail does not have a well known coat-tail site. The implication is that awareness-building becomes more of a costly and time-consuming challenge.</p>
<p>Experience has shown that it is far more successful to build a trail and work out issues (i.e. buffers, tenures, rights of way, permits) during the course of the project rather than working to plan and get all parties on side for every conceivable facet of the trail before construction begins. The latter technique has proven, more often than not, to be a 'project ender'.</p>	<p>The volume of visitor traffic (67,000 - 150,000) to Powell River is low in relation to the overall visitor needs of the trail. Current traffic includes commercial, family and other non tourist traffic. The marketing strategies in this Business Plan necessarily target specific user groups, and also how to attract them to visit the region. The current visitor 'numbers' are a prime concern.</p>
<p>Direct and indirect job creation and other economic benefits (<i>please see 'Economic Benefits' chapter in the Business Plan</i>).</p>	<p>Raising capital costs and building and maintaining a revenue stream to support marketing and operations. While this is dealt with in this Business Plan, these fund-raising needs are still deemed a project risk.</p>
<p>Land and wilderness preservation.</p>	<p>The issue of buffer zones on the trail requires resolution. Harvesting across the trail will detract from the trail. No harvesting will cost the tenure holders lost revenues. Clearcutting within key trail areas and visual zones is part of this same issue of co-existing with forestry.</p>
<p>Image building for the region.</p>	<p>Sliammon treaty negotiations and land claims.</p>
<p>Increased visitor traffic.</p>	<p>The trail does not offer easy access to areas that can offer winter activities (cross country skiing, snow shoeing). Further, the precipitation levels experienced in the area further limit the trail's 'peak use' to 5-6 months.</p>
<p>Spin off benefits to existing hospitality and tourism goods and service providers.</p>	<p>Weyerhaeuser reiterated its position in a Jan 4/00 letter that there are no commitments to maintain buffers along the trail. Further, it is believed that portions of the trail can be relocated into areas already removed from</p>

Strengths	Weaknesses (and Risks)
	forestry. It is also stated that the buffer zone and ribbon of old growth concepts are unrealistic. Discussions must ensue to permit both forestry and the trail to co-exist without impacting on forestry.
Infrastructure in place to service trail users.	Currently, inadequate information packages and maps distributed to hikers. No initiation sessions or awareness of rules and standards given to hikers.
Proximity to key markets (Lower Mainland, Vancouver Island, Alberta, U S West Coast).	Lack of information about trail before visitors come to area, i.e. "I have just hiked the West Coast Trail, but if I known about this trail before I came, I would have planned to do it."
Growing trend in ecotourism and trail tourism.	Lack of signage and poorly marked access points.
The existence of other long range trails and their experiences act as viable role models.	Reliance on ferry schedules to access area, although the "isolation" feature can also be a selling point for those seeking the wilderness experience.
Strong core group of volunteers.	The sale of other private lands which the trail currently traverses.
High level of acceptance, support and enthusiasm by community and other stakeholders. Cross promotion already in place.	Marketing the trail before it is ready. Currently, the trail is being marketed as virtually complete where, in reality, there are improvements, upgrades and infrastructure development still required. This may cause a 'backlash' from current users disappointed with the trail.
Existing reputation for area among European, especially, German visitors.	
Broad appeal due to levels of ability required to hike the trail; trail can be split into manageable portions, as opposed to the West Coast Trail which is an 'all or nothing' proposition.	

3.11 Training Issues

The demand for training in association with trail construction, maintenance and operations varies depending on the skills of workers and volunteers. Construction and maintenance skills, other than engineering requirements for bridge construction, are basic and knowledge is passed on from more experience trail workers. Trail associations often produce Guides for Trail Workers and produce in-house education programs for workers.

The Sunshine Coast Trail could also become a vehicle for a broader initiative in training and become a “classroom” for ongoing training programs related to employment adjustment.

In the context of trail management, training for safety and security function are ongoing. For example, the first aid and emergency training program for the West Coast Trail costs approximately \$40,000 per year.

Recreation Administration Diplomas are available through community colleges, such as Malaspina College in Nanaimo. Malaspina offers a recreation administration 2-year Diploma program. The program is offered with the option of a co-operative education format with four academic semesters and two paid co-op placements. The focus of the program is on the provision of leisure services and products in public, private and not-for-profit sectors within communities. Career opportunities for graduates are within the areas of public recreation for recreation associations and public recreation facilities, outdoor recreation facilities providing camping, wilderness experiences, risk recreation and environmental education.

Potential Sunshine Coast Trail Employment/Internship Opportunities

Position	Description	Requirements	Salary/Dates
Caretaker	In the field resource management/environmental education experience. Meet, greet and register hikers and provide information on environmental sensitive practices. Environmental group talks. Maintenance of outhouses, minor trail maintenance, trash control.	Responsible and enthusiastic, backpacking knowledge. Excellent communication skills, good physical condition, willingness to live and work outside. Basic first aid certification, wilderness first aid certification desirable.	\$230 - \$280 per week for 23 weeks from end of May to middle of October.
Position	Description	Requirements	Salary/Dates
Trail Crew Coordinator	Support of two volunteer trail crews by planning meals, purchasing food, maintaining base camp facility, recruiting volunteers, assisting with transportation. Assistant crew leaders.	Minimum of two seasons working in an outdoor recreation setting plus one season of trail work. Valid drivers license. Ability to maintain accurate records.	\$250 - \$300 per week plus room and board May - September
Trail Crew Leader (immediate need for Phase Two)	Teach and lead a volunteer crew for maintenance and reconstruction work.	Minimum of two seasons of trail work experience plus one year experience supervising people in outdoor setting. Ability to teach trail skills.	\$250 - \$300 per week plus room and board May - September

Assistant Trail Crew Leader	Assist crew leader with teaching and leading a volunteer trail crew .	Minimum of one season of trail work experience.	\$225 - \$275 per week plus room and board May - September
Trail Crew Intern (immediate need for Phase Two)	Assist with management and provisioning of a 6-8 person volunteer trail crew. Opportunity for chainsaw and wilderness first aid certification available.	Good health, physically fit. Interested in learning about all aspects of trail work.	\$50 per week plus room and board. Flexible between May 19 and September 13.

3.12 Action Plan & Timelines Chart

There is little doubt that, after a careful review of the research findings, expert industry input, financial analysis, strengths and weaknesses and potential economic benefits, and an assessment of issues relating to tenure, buffers and jurisdiction, that **the Sunshine Coast Trail is both a viable initiative, well received and supported by the community and First Nations, as well as being an exceptional potential economic stimulus to the area. The Sunshine Coast Trail has the potential to become one of BC's and Canada's premier wilderness trails with a national and international following.**

That having been said, there are a host of issues to be dealt with, some of which can be considered formidable, albeit probably not insurmountable areas of contention.

The following depicts the implementation process with priority deliverables, timelines and milestones necessary to bring the initiative to fruition. The timeline covers a two year period, the first critical timeframe for implementation. The overall two year timeframe is divided into eight quarterly periods, each representing three months. 'Quarter One' should commence as soon as possible, once this Business Plan has been bought into by key players in the process.

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
<u>AWARENESS BUILDING</u>								
Distribute copies of the highlights of this document to those involved in, or could be involved in supporting the trail and implementation.	–							
Information Kiosk at Mall, manned by Eagle and Scott.	–	–						
Media coverage and awareness building.		–	–					
Garner political support (Gordon Wilson).	–	–						
Get Municipality on side and get 'champion' (i.e. Judy Tyabji).	–	–						
Get Sliammon First Nation on side.		–						
Build a network of volunteers, a critical mass of the initiative.		–	–	–				

Deliverable	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8
<u>ORGANIZATION</u>								
Establish the new legal, non-profit governing entity. Transfer any rights or agreements PRPAWS has into the new entity.		–	–					
Creation of the Board, including high profile / spokespeople participation.			–					
Develop the Charter and adopt the vision of the initiative.			–	–				
Visioning Committee for 'big picture planning. Assign tasks and responsibilities (as defined in this presentation0.			–	–				
Select an Executive Director. Assign tasks and responsibilities.			–					
Financial and Budget Committee. Assign tasks and responsibilities.				–				
Revenue Generating Action Team. Assign tasks and responsibilities.			–					
Marketing and Public Relations Committee. Assign tasks and responsibilities.			–	–				
Select a Marketing Manager. Assign tasks and responsibilities.			–					
Maintenance Committee. Assign tasks and responsibilities.				–	–			
Safety Committee. Assign tasks and responsibilities.				–	–			
First Nations Committee. Assign tasks and responsibilities.				–	–			
<u>FUNDING AND FUNDRAISING</u>								
Revenue Generating Action Team, and Executive Director and Marketing Manager to review and adopt Proforma Budgets and Revenue Generating Options presented herein and establish priorities.			–					

Deliverable	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8
Assign specific tasks to individuals, or groups of individuals.			–					
Package the Sunshine Coast Trail for regional fundraising.			–	–				
Founder Membership Drive.			–	–	–			
Corporate Membership Drive.			–	–	–			
Discussions with HRDC re funding employment, including startup jobs.		–						
Research any and all government funding envelopes, including Ministry of Tourism Ecotourism Gateway Initiative, Ministry of Community Development, Co operatives and Volunteers, and others.		–	–	–				
Identify and work with any foundations or special interest groups of national and international calibre and secure their certification / endorsement, in-kind assistance and expertise and funding assistance as may be offered.				–	–			
For any government or special interest group opportunities identified above, prepare funding submissions.				–	–			
Events planning and implementation.			–	–				
Personal Membership Drive. Assure media awareness campaign.				–	–	–	–	–
Develop Passport Kits with maps, sites and commercial couponing.				–				
Establish distribution sites throughout the region for the Passports.				–	–			
<u>HUMAN RESOURCES</u>								
Define roles of Executive Director and Marketing Manager (roles presented in this document). Discussions with HRDC, Community Futures, etc. re funding their being brought on board at a very early stage of this process.		–						
Define other employment or contracting opportunities and skillsets required re trail maintenance, trail building, campsites and cabin construction.		–	–					

Deliverable	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 5	Qtr 6	Qtr 7	Qtr 8
Develop training programs re above. Involve Malaspina College into this process.				-				
Identify and access labour subsidy and training programs, leveraged through several sources.			-	-				
Continue to build the all-important Volunteer Network to involve them in every aspect of this implementation process.					-	-	-	-
<u>JURISDICTIONAL AND PHYSICAL ASSET ISSUES</u>								
Trail Management Agreement with Ministry of Forests and other involved forest tenure holders.		-	-					
Mediation for the preferred management of forest resources adjacent to the trail.		-	-					
Agreement with Ministry of Parks re location of trail within parks, tenure agreements, signage and management plans.		-	-					
Management strategy with Regional District re Haywire Bay Park.		-	-					
Address, with Min of Transport, signage for trail crossings, parking and alignment of portions of trails crossing highways & roads.		-	-					
<u>JURISDICTIONAL AND PHYSICAL ASSET ISSUES</u>continued								
Develop a process of dealing with conflicts on private property.		-	-					
Trail Management Agreement with Sliammon FN where trail traverses their property.		-	-					
Research the liability issue and exposure re trail users and the Sunshine Coast Trail organization.		-	-					

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
<u>MARKETING STRATEGIES</u>								
Hire a Marketing Manager (mentioned earlier). Assign tasks and priorities.			–					
Build a directory of trail infrastructure goods and services providers.				–				
Build a detailed inventory of the physical assets of the trail, maps, viewpoints, access points, regional infrastructure available, etc.				–				
Hire a Website designer. Upgrade and expand the site. Use ‘Flash Technology’ to add video clips, music and narration.			–					
Hire a Webmaster to establish links for the site, maintain high profiling and high exposure.					–			
Secure editorial coverage in leading outdoors and travel magazines.				–	–			
Develop the revenue-generating ‘Passports’ for trail users.				–	–			
Identify and coat-tail any and all government marketing initiatives.				–	–	–		
Establish liaison with ecotourism clubs, organizations, travel agent, tour packagers and other lead ‘multipliers’.					–	–		
Liaison with other existing trails for ‘cross referring’ trail users.					–	–		
<u>PHYSICAL TRAIL AND FACILITIES DEVELOPMENT</u>								
Carry out Phase Two trail and campsite development.			–	–	–	–	–	–
Trail maintenance crew development.					–	–		
Phase Three cabin designs and costings.								–
Prepare for commencement of cabin construction program.								–
<u>SLIAMMON FIRST NATION</u>								

<i>Deliverable</i>	<i>Qtr 1</i>	<i>Qtr 2</i>	<i>Qtr 3</i>	<i>Qtr 4</i>	<i>Qtr 5</i>	<i>Qtr 6</i>	<i>Qtr 7</i>	<i>Qtr 8</i>
Discussions re cultural and heritage opportunities and involvement of SFN in longhouse building, canoe and kayak rentals, guided tours, cultural events and facility rentals at Sliammon Lake and/or Little Sliammon Lake.			–	–	–			

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