



**Kitselas Canyon Historic Site  
Demand Analysis**

**Final Report**

March 2002

For Kitselas First Nation

By Teija Wakeman

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## **Acknowledgements**

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## **Kitselas Canyon Historic Site Demand Analysis Report**

### **A. Background**

The Kitselas First Nation of the Tsimshian Nation wishes to develop a world-class cultural tourism destination at the Kitselas Canyon Historic Site. This Site, along the Skeena River, will showcase the Canyon's natural beauty and the rich cultural heritage of the Kitselas Nation's traditional lands. The following significant First Nations' archeological sites exist alongside and within Kitselas Canyon:

- Evidence of pre-contact historic villages along the Skeena River;
- Rare petroglyphs on Dry and Ringbolt Islands;
- Representations of traditional houses, totems and fortress remnants of the archeologically significant historic villages of Tsunoyow, Gitaus, Gitlaxdzawk, and Gitxtsaex.

To provide access and attract visitors to Kitselas Canyon Historic Site, the Kitselas First Nation envisions a cultural tourism venue to attract and accommodate same day and overnight visitors to the area. Once there, visitors will have the opportunity to experience the site in the following ways:

**Guided Walking Tours**—A scenic walkabout alongside the Canyon and surrounding area with viewpoints of the archeologically significant sites. The walkabout trail system will include appropriate amenities such as picnic tables, barbeque facilities, and rest areas with restroom facilities.

**Kitselas Canyon Historic Site Cultural Village**—A venue overlooking the Skeena River and designed to resemble a traditional Tsimshian Village with post and beam longhouse construction. The Village will include a Visitor Information Center, arts and crafts sales, a museum to depict culture and history, a carving and crafts workshop, food kiosks and/or restaurant and eating areas.

**Riverboat Tours**—An additional attraction providing visitors with Riverboat Tours along the Skeena River to take guests closer to the significant archeological sites and to view the petroglyphs on Dry and Ringbolt Islands as well as a walking tour of the "fortress".

**Recreational Vehicle Campground**—A RV Campground facility will be constructed to attract overnight visitors with recreational vehicles. It will be complete with amenities such as electrical, water and sewer hook-ups, shower and restroom facilities and potentially a traditional sweathouse as an added attraction.



## **B. Current Situation**

The following information provides a comprehensive review of the current patterns regarding who is currently visiting the Northwest region, why they are visiting, how they are traveling, and where they stay. The Northwest region referred to in this report is the western half of the one of BC's nine tourism regions, known as the North region. The North's southern most boundary cuts laterally across BC beginning in Jasper and ending at the southern most tip of Queen Charlotte Islands and Haida-Gwaii. The North region is split longitudinally along the Continental Divide to distinguish between the Northeast and Northwest.

### ***Accommodation and Access***

According to Tourism BC's preliminary estimates for 2001, the Northwest BC region received approximately 1.54 million overnight visitors.<sup>1</sup> Almost three quarters or 1,240,200 were British Columbia residents and of those 618,310 were Northern BC residents traveling regionally. This seemingly high volume is not an anomaly when compared to other jurisdictions in Canada, as intra-provincial travel plays a significant role in Canadian travel patterns and most of the travel in the Northwest region was to visit friends and relatives.

Averaging all visitors to the region in 2001, approximately 323,400 visited the Kitimat/Stikine area.<sup>2</sup> Visitors to this region traveled predominantly by automobile (car, RV, motor coach), otherwise known as "rubber tire" traffic. Most traveled via the TransCanada Yellowhead Highway to points east or west. Northern BC Tourism promotes a Northern BC Circle Tour Route that includes highways 97, 29, 37, 16 for this rubber tire traffic or touring market.<sup>3</sup> For many visitors, traveling the North via the TransCanada Yellowhead and Alaska Highways is an once-in-a-lifetime event or final frontier to be explored.

Recently compiled highway travel statistics note that the TransCanada Yellowhead Highway to points Prince George west enjoys a summer season traffic count of 22,900 automobiles, however, traffic drops off significantly to 6,139 automobiles continuing west of Smithers.<sup>4</sup> The loss of traffic along the TransCanada Yellowhead Highway is difficult to account for, however, the significant drop may be attributed to large numbers of visitors driving northeast to connect to the Alaska Highway. Anecdotal information suggests that travelers do not complete the circle, but continue on their route back through Alberta or take the Alaska Highway Ferry and connect to the BC Ferry traveling to Vancouver Island.

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<sup>1</sup> Tourism British Columbia 2001 preliminary visitor estimates

<sup>2</sup> Tourism British Columbia 2001 preliminary visitor estimates and BC Visitor Study The report of Visitors to Northern BC Tourism Region: Northwest released 1998 visitor trip characteristics page 13

<sup>3</sup> See Appendix A depicting the map of the Northern BC Circle Tour Route

<sup>4</sup> TransCanada Yellowhead Highway statistician Becky Shields February 19, 2002



Terrace Tourism Council's most recent statistics verify that approximately 7000 travelers request information at the Visitor Information Center each summer season (May to September). Terrace has approximately 500 hotel/motel rooms, and the Northwest's regional occupancy rate was 51% in 2001, a 5% decline from the previous year due mainly to the decline in the forestry sector.<sup>5</sup> These low occupancy rates can also be partially explained by Tourism BC estimates, which attest that on average only 20% of Northwest BC travelers stay in hotel/motel accommodation. The majority of visitors to the region stay with friends and/or family and 12% stay at RV or provincial campgrounds.<sup>6</sup> As a result of the above mentioned vacancy rates, Terrace is well positioned to accommodate more overnight visitors.

Terrace is accessible by air, rail and the road. Transportation corridors to the region adequately meet current demand.<sup>7</sup>

### ***Visitor Profile***

The primary traveler to the region is male, on average 42 years, many travel with a spouse or partner. US and overseas visitors have a similar profile, however, they tend to be slightly older averaging 55 years of age. Although the overwhelming majority of visitors are northern BC residents, visitors from elsewhere in Canada, the US and overseas is significant at approximately 430,360 visitors to the Northwest region in 2001.<sup>8</sup> The majority of visitors have some post-secondary education and make more than \$50,000 per year.

Although there are some visitors who vacation in the north annually, this segment represents an affluent few who take an annual fishing holiday at a private lodge. For the majority of non-resident visitors to the Northwest, it is a one-time event. Travelers are interested in "soft adventure" activities such as sightseeing, visiting historic sites and cultural events, fishing and boating. They are motivated by outstanding scenery and natural wilderness. Many are seasoned travelers venturing off in Recreational Vehicles every summer to a new destination.

### ***Place of Origin***

Contrary to the Canadian travel pattern of North/South travel, most visitors to the Northwest region enter via the Alberta/BC border<sup>9</sup>.

Anecdotal accounts confirm BC Visitor Study findings, that aside from BC residents, the majority of travelers are American and most European travelers are German, Dutch and

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<sup>5</sup> Pannel Kerr Forster Consulting Inc., Beth Walters March 12, 2002

<sup>6</sup> See Appendix B for a breakdown of visitor accommodation in the Northwest BC region

<sup>7</sup> See Appendix C for an accommodation and infrastructure inventory

<sup>8</sup> See Appendix D for a breakdown of overnight visitors to the Northwest BC region

<sup>9</sup> BC Visitor Study—The Report of Visitors to Northern BC Tourism Region: Northwest



Swiss. Many come to the region on guided motor coach tours, however, the most frequent mode of travel is by RV. US visitors travel in their own units while overseas visitors rent RVs in Calgary, Edmonton or Vancouver (3000 Recreational Vehicles are rented during July and August in BC)<sup>10</sup>. Northern BC Tourism heavily promotes a Northern BC Circle Tour Route beginning in Prince George. Overseas travelers who rent RVs in Calgary to travel north either travel to the Alaska Highway circle or take a southern route via—Calgary-Jasper-Prince George-Smithers-Prince Rupert-Vancouver Island-Vancouver.

Anecdotal information supports the conclusion that the majority of repeat US visitors originate from Texas, California, Idaho, or New York. In general they are either traveling to Alaska or to stay in Terrace to fish.

### ***Spending Patterns***

In 1995, Tourism revenue for the region was \$425 million, 67% of which was spent by BC residents, and the remaining by other visitors to the region. Non-residents spent an average \$234 per overnight stay versus BC residents spending \$178 per overnight stay. Excluding package tour travelers, food and beverage was the highest trip expenditure, followed by accommodation and transportation costs. On average BC resident visitors spent \$8 per day on attending attractions and all visitors to the region spent between \$11-\$15 a day buying gifts and souvenirs.

### ***Reasons for Visit***

Most people travel to holiday in the region during July and August, however, the season begins in June and lasts well into September. BC residents traveling to the region do so to vacation and to visit with friends and family. Many vacationers also attended art galleries and museums, participated in wilderness activities, shopping and sightseeing.<sup>11</sup> Twice as many people took part in land-based activities such as visiting parks, wildlife viewing, hiking/backpacking versus water activities fishing and boating. Non-resident visitors spent the most time visiting historical sites at 43% and 26% visited Native Cultural sites<sup>12</sup>.

### ***Method of Travel***

The majority of Northwest visitors traveled to the region by automobile. The number of visitors traveling by RV ranged between 18% of BC residents and 27% of non-residents. Surprisingly, visitors from greater distances, including Europe, also traveled by RV camper, substantially outnumbering visitors traveling by guided tour. Less than 5%

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<sup>10</sup> Interview with Joss Penny, Executive Director BC Lodging and Campground Association

<sup>11</sup> See Appendix E for further elaboration on visitor activities in the Northwest BC region

<sup>12</sup> BC Visitor Study—The Report on Visitors to the Northern BC Tourism Region: Northwest



## **Primary Target Markets**

### ***Resident BC Traveler Profile***

- Average age 42 years
- Male traveling with spouse or partner
- Employed
- Higher than average education
- Interested in wildlife viewing, beach activities, visiting historic sites and fishing
- Interested in visiting places that foster environmental stewardship & learning about culture and the environment
- Value for money

Nearly half of all RV users in the summer months are BC residents, followed by one-quarter from Alberta. RV users tend to stay longer than the typical average tourist at 12.9 nights, partially as a result of the distances traveled to reach their desired destinations.<sup>15</sup>

### ***Canadian Traveler***

Residents of other Canadian provinces, primarily Alberta should be targeted. This traveler is similar to the BC demographic profile. Long haul travelers tend to be older averaging 55 years.

### ***US Traveler***

The US market is significant for the overall BC tourism industry and approximately 324,800 visited the Northwest in 2001. Anecdotal information confirms that large numbers of US visitors are traveling annually to the Northwest region. This segment can be broken down into two:

- 1) Touring Segment: These travelers arrive by car or tour bus package tours. Their interests are scenery, relaxation, culture and learning.
- 2) Outdoor Segment: These travelers arrive primarily by car or recreational vehicle and their interests are hunting, fishing, hiking, camping, and other outdoor activities.

Each of these segments travel with a spouse or partner. The guided tour segment will be addressed later as a separate target market.

### ***US Traveler by RV***

- Average age 55 years and older
- Retired
- 69% male
- Traveling with group or with spouse
- Higher than average education and income
- Interested in soft adventure activities: fishing, sightseeing, wildlife viewing

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<sup>15</sup> BC Recreational Vehicle Campground and Resort Study 1998





- Associate BC as safe
- U.S. travelers rate attending cultural and historical sites as high (over 1/3 of US adult travelers attend historic/cultural trips within their own country or abroad<sup>16</sup>) and motivate destination choices.

### ***Overseas Market***

In 2001, the Northwest BC region received over 105,560 overnight visitors from overseas. This market shows a strong interest in First Nations culture, in particular visitors from Germany, France and the United Kingdom.<sup>17</sup> Many of these visitors have preconceived ideas about native culture from books and movies but they remain open-minded and interested in learning about new cultures. Areas that interest them most are interpretive tours, museums and cultural events. The German visitor is particularly interested in outdoor experiences.

Japanese and other Asian markets represent a mere 2% of visitors to the Northwest region. This segment is interested in learning about aboriginal culture, however, they are more inclined to visit larger centers, which have comfortable accommodations, and visit interpretive centers and museums there.

### ***European Traveler by RV***

- Average age 45
- Traveling with spouse or group
- Employed
- Highly interested in learning about First Nations culture
- Views Canada as safe, clean and environmentally conscious
- European tourists value the following in destination decisions: nice weather, outstanding scenery, opportunities to meet new, interesting, and friendly people, increasing one's knowledge.
- German travelers rate clean, unspoiled wilderness environments crucial to vacation destination planning and give a high rating for First Nation's cultural tourism opportunities. Visiting cultural and historic sites ranks second to outdoor activity interests.

### ***Long-haul Tour Operators***

Due to the increasing trend in soft adventure and because this market is interested in new things to see and do, beautiful scenery, historic sites and cultural events, tour operators targeting the United States, Canada, German, Swiss, Dutch and UK need to be aggressively marketed.

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<sup>16</sup> Canadian Tourism Commission 2001 US Tourist Motivation Study

<sup>17</sup> See Appendix G travel motivation information for key European markets



### ***Eco-tourism Travelers***

- Age 25-54
- Travel primarily as couples
- Higher than average education
- Employed professionals
- Environmentally and politically astute

Eco-tourism is a strong emerging market. These travelers are environmentally and politically conscious, motivated and interested in visiting unspoiled wilderness areas and learning about Indigenous cultures. They enjoy intellectually and physically challenging activities such as ocean and river kayaking, rafting, hiking, camping, and mountaineering.

### ***Secondary Target Markets***

#### ***Terrace area residents***

The majority of visitors to the Northwest region are there to visit with friends and family. This market is significant enough to warrant aggressively targeting area residents to visit the site.

#### ***Local school children***

Local schools should be targeted to offer further understanding of the culture, history, values and customs of the Kitselas First Nation.

#### ***First Nations traveler***

Little research has been conducted on First Nations' travel patterns. However, it is known that First Nations people do attend Indigenous Peoples' festivals and cultural events such as powwows and athletic events. These interests will need to be considered in the marketing plan.

## **D. Recreational Vehicle Traveler Needs**

After location, the most important criteria for RV travelers are quality services and amenities. Successful RV campgrounds are generally destination campgrounds, preferably with access to a lake, stream or ocean where visitors can pursue beach and fishing activities. Anecdotal information supports that as for amenities, the need for shower facilities ranks highest amongst RV travelers. The following desired amenities are ranked in order of importance: showers, picnic tables, sani-station, fire pits, privacy, laundry facilities, minimum 30 amp electrical service, pull thru sites, convenience store, telephone.<sup>18</sup> A pre-booking system is preferred, as is the acceptance of major credit cards, and pets, dogs in particular.

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<sup>18</sup> See Appendix H for Recreational Vehicle camper amenity needs



Recreational Vehicle travelers prefer to pre-book overnight campsites to secure premium locations. Providing this option would: 1) provide advanced bookings to assist with cash flow and assigning human resources; 2) publicize Kitselas Canyon Historical Site.

Due largely to economies of scale, larger campsites are generally more successful than smaller ones. The average fee a RV camper would expect to pay is between \$18-\$30. The lower fee range is for provincial RV facilities and campgrounds with fewer amenities or less desirable destinations. The four RV campgrounds in Terrace, charge between \$18-\$24 for full amenity facilities. Each of these campsites is in a semi-urban setting (within Terrace city limits) and do not offer beach or river access.

## **E. Competitive Analysis**

### ***Motel/RV park combinations in Terrace***

There are four RV park motel combinations in the Terrace area. Not all of the facilities are fully serviced and the hook-ups range between 6-25 hook-ups. Only the Water Lily Resort alongside Lakelse Lake is considered a destination campground and it has both water and power hook-ups.<sup>19</sup>

### ***House of Sim-oi-ghets Gift Shop***

The House of Sim-oi-ghets Gift Shop is situated just outside Terrace along the TransCanada Yellowhead Highway. The shop sells authentic arts and crafts such as totem poles, leather goods and local carvings.

### ***K'san Historical Village and Museum***

K'san Historical Village and Museum located near Hazelton, is one of British Columbia's top 10 attractions.<sup>20</sup> This cultural tourism venue replicates a traditional Gitksan village reconstructed on an original village site. It has seven communal houses, totem poles, dugout canoes, a carving shed, and provides food service.

The venue is open for the summer season from May to September providing guided tours and traditional dance performances during July and August every Friday evening. The fee for guided tours is adults \$10, students \$8.50, seniors \$8.50, and \$32.00 for a family of more than four.

K'san Historical Village has received an average of 19,400 visitors annually for the past four years. Numbers of visitors attending the venue has declined from 22,000 in 1998 to 15, 580 in 2001.<sup>21</sup> Suzie Cummins, of the K'san Historical Village, attributes the decline to increased fuel prices, weather conditions and September 11<sup>th</sup> events, which resulted in cancellations of scheduled tours. In 1995, more than 200 guided tour operators visited the site. This number has slowly declined to 130 guided tour operators in 2001.

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<sup>19</sup> See Appendix I for Terrace area RV campground inventory

<sup>20</sup> The Milepost 2001

<sup>21</sup> K'san Historical Village and Museum interview with Suzie Cummins February 18, 2002



Ms. Cummins has observed a change in visitor demographics. Within the last few years more affluent and younger professionals are visiting the site, and eco-tourism providers are bringing guests in increasing numbers.

#### ***Laxspa'aws Pike Island***

Pike Island, located off the coast of Prince Rupert offers visitors a 3½ hour guided interpretive walking tour. The tour guides relate the archeologically significant site to Tsimshian legends and heritage. During low tide visitors can view canoe run remains and petroglyphs.

Pike Island principles did not wish to disclose visitor numbers. However, they did confirm that the increasing attendance numbers over the past three years is encouraging.

#### ***Northern BC Museum***

The Northern BC Museum is located in the award-winning Chatham Village Longhouses in Prince George. The museum depicts First Nations history and settlement history along the north coast. It is reported to have an outstanding collection of artifacts. The museum offers predominantly self-guided tours. Admission fees are adults \$5, students \$2, children under 12 \$1, children under 5 years are free, and \$10 for a family of more than four.

#### ***Kitwanga Fort National Historic Site***

One of five National Historic Sites in BC and the first Native site commemorated in the west by Parks Canada, Kitwanga is located along the TransCanada Yellowhead Highway between Hazelton and Terrace. The site commemorates the culture of the Tsimshian people and their history along the Nass River. Most notably it is the site of Battle Hill, of which archeologically significant fortified houses remain. Seven interpretive panels recount the story of the site and leads visitors to archeological evidence of plank houses, food cache pits, puberty pits and a sweat pit. No fee is involved visitor estimates are not tallied.

## **F. Potential for Growth**

North American aboriginal culture is unique and fascinating to many in the world. Within North America, the overwhelming majority of travelers rank visiting cultural and historic sites as predetermining factors in making their travel plans. The demand in key European markets, most notably Germany, rank seeing and experiencing unspoiled wilderness and learning about native culture as key determinants in planning their vacation destinations. Another competing market for Europeans interested in experiencing remote areas that provide native culture and natural beauty is South Africa.

There is potential of harvesting the market share of visitors currently visiting the Northwest region. The immediate Terrace area lacks the inventory of venue options for visitors—or reasons to stay or stay overnight. There is strong anecdotal evidence to support demand for further development of the First Nations' cultural tourism activities.



for visitors—“people want to catch fish, see bears and experience First Nation’s culture (and purchase souvenirs)”.<sup>22</sup> Terrace is currently positioned to target visitors interested in fishing, bear viewing, and First Nations culture. However, an interactive, interpretive First Nation’s component is desired.

Many guided tour operators in the region include a First Nations’ cultural component in travel itineraries, as demonstrated by 130 tours attending the K’san Historical Village and Museum each year. The Norwegian Cruise line, expected to dock in Prince Rupert in 2003, will be providing shore excursions involving a cultural component, therefore a First Nations’ cultural destination and National Historic Site would be desirable shore excursions.

Potential also lies in targeting long haul tour niche operators or educational tour providers, in partnership with First Nations communities offering a cultural experience package involving the following communities: Kitselas Canyon Historical site, Nisga’a Lava Bed Memorial Park, K’san Historical Village and Museum, Gwaii Haanas and House of Sim-oi-Ghets arts and crafts shop.

There is tremendous potential for harvesting the RV market. Soft adventure experience offered by the Kitselas Canyon project is exceptionally appropriate for RV travelers. RV campers are repeat traffic and highly networked—communicating with each other about “what to see and what not to see”. Poor visitor experiences result in poor attendance over the long-term (as demonstrated by events affecting the Alaska Marine Highway experience, which likely contributed to the significant drop-off in American visitors to the region last year). The key to success is to provide the required amenities to attract overnight visitors and to create a destination campground located near the river.

The tragedy of September 11, 2001, is expected to have a positive impact through an increase in rubber tire traffic—Canadians and Americans perceive BC as a safe place to travel, even alone, and thus projected numbers of travelers to the northern region is expected to remain the same or increase.

#### ***Projected Attendance Estimates***

The potential number of visitors will depend on the success of marketing initiatives and to some degree future travel trends, however, using current data, assuming the success of marketing initiatives, and infusing modest growth projections; of the estimated “rubber tire traffic” passing through Terrace, it is predicted that Kitselas Canyon Historic Site will attract 4,882 visitors in 2004 increasing to 10,492 visitors in 2007. Complete details and methodology used to determine growth projections can be found in Appendix J.

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<sup>22</sup> Interview with Linda Bell at the Terrace Chamber of Commerce



## **G. Program and Partnership Opportunities**

### ***Marketing Partners***

Working in isolation would severely limit the opportunity to harvest and attract potential visitors to the historic site. Kitselas Canyon Historic Site should consider membership and/or partnering with organizations to market through ads in promotional materials, and attendance at consumer and tour operator tradeshow. To achieve this, membership and active participation in the following organizations are recommended:

- Terrace Tourism Council
- Northern BC Tourism.
- Aboriginal Tourism Association of BC
- Parks Canada
- BC Parks
- British Columbia Lodging and Camping Association

### ***Eco-tourism Partners***

Eco-tourism providers have expressed keen interest in partnering with Kitselas Canyon Project to provide partially or fully guided tours in partnership with Kitselas Canyon operators. Eco-tourism operators cater to an emerging market that offers general to specialized activities involving nature, outdoor adventure and learning about another culture.<sup>23</sup> A formal marketing plan needs to be developed to provide further details on how to attract eco-tourism partners. This plan will likely recommend starting with local eco-tourism operators and then developing the network through attendance at adventure tradeshow and through a website presence.

### ***Tour Operator Partners***

The tour operator market was tenuous for many previous years due to over supply of providers competing in a limited market. A shake down began prior to September 11<sup>th</sup> and many previously dominant operators have since vanished. The remaining survivors merged with other operators, for example Thomas Cook merged with Globus. However, group tour travel is expected to remain strong in the region.

Tour operators want to provide varied and interesting activities for their touring guests. Northern BC is positioned in the tour industry as remote, offering spectacular scenery, wildlife viewing and a First Nations cultural component that is a desired component of tour packages. A forthcoming marketing plan, which will build on this demand analysis, will provide detailed information on how to best attract tour operators to the region. Attracting tour operators will require attendance at tour operator tradeshow such as Rendezvous, Canada's West and Marketplace, offering familiarization tours to tour operators, and aggressively following up leads with customized promotional kits.

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<sup>23</sup> Eco-tourism Demand Assessment for Alberta Tourism 2000



## **H. Way Forward**

### ***Prepare Marketing Plan***

A great market-ready tourism product is essential but does not guarantee success. To ensure success, marketing strategies are required. The Demand Analysis identifies target markets. The next step is to develop a marketing plan that defines marketing objectives over the short and long-term, prepares strategies to achieve those marketing objectives, and develops the appropriate marketing initiatives.

### ***Appoint Marketing Coordinator***

A marketing coordinator will need to be hired to prepare and implement the marketing initiatives. The terms of reference for this position should include:

- Act as Kitselas Canyon Historical Site representative at tourism meetings and on committees
- Attend tourism and consumer tradeshows
- Promote Kitselas Canyon at community and regional events
- Prepare promotional materials
- Maintain consumer and tour operator database
- Respond to information requests
- Act as media liaison to publicize the venue, seek publicity opportunities
- Monitor demand and visitor feedback on an on-going basis

### ***Join Tourism Marketing Organizations***

Networking and working collaboratively with established tourism marketing organizations will optimize success. Kitselas Canyon Historic Site designation and continued collaboration with Parks Canada and BC Parks will attract visitors through joint marketing initiatives. Partnering with these organizations offers significant marketing opportunities with greater cost effectiveness than acting individually. For example, membership with the Terrace Tourism Council will positively affect marketing initiatives and provide a forum for advocating a stronger marketing position for the Northwest region with Northern BC Tourism. Northern BC Tourism membership provides opportunities to partner in consumer and tradeshows (members are subsidized and encouraged to attend). Membership also guarantees inclusion in their well-produced and distributed visitor guides. Membership in the Aboriginal Tourism Association of BC is key to remaining abreast of First Nations Cultural tourism trends and market demand. This association also has a well prepared website that can include Kitselas Canyon Historic Site.



## **I. Conclusion and Recommendations**

Findings show that an overwhelming number of Canadian, US and overseas travelers include visiting cultural tourism destinations in their travel plans. Of the approximate 323,400 overnight visitors to the Kitimat-Stikine region, more than 40% will visit a cultural tourism destination during their trip. The Kitselas Canyon project is ideal for travelers seeking soft adventure activities during their trip and bodes equally well for travelers seeking more adventurous outdoor activities.

The Kitselas Canyon Historic Site will be a unique offering to the Northwest area and offer additional attractions within the established and promoted Northern Circle Tour Route. The planned venue will provide interesting day attractions for the numerous travelers who travel through but do not stay in the area; allow overnight travelers, especially the RV market, to stay and enjoy the Canyon; and provide an exciting local attraction for the community to share with the many friends and family who visit them.

There is significant potential for increased demand for a cultural tourism destination such as the Kitselas Canyon Historic Site. Canadian travelers rate Native historic sites as their favorite tourist experience. BC travelers look for experiences that involve wildlife, historic sites, places that show responsible environmental stewardship, and opportunities to learn about a new culture. The US traveler that tours places high importance on wanting to experience inspiring scenery, learning about a culture, and relaxing. The US traveler that engages in outdoor travel wants to experience the outdoors through activities such as fishing or camping. Overseas travelers are very interested in First Nations' culture and in particular, the German traveler is interested in outdoor activities. The Kitselas Canyon Historic Site will appeal to all of these travelers.

The competition in the region can be seen as potential partners. Although there are similarities among the offerings, the Kitselas Canyon Historic Site brings together a number of desirable attractions in one place. It will offer a more diverse experience for the visitor as well as provide for day and overnight hospitality. It will attract those who are looking to learn about the First Nations' culture, as well as those looking for a soft adventure, or visitors wanting a beautiful setting to park the RV to relax and enjoy the scenery. To attract overnight visitors and enhance RV visitor's experience, it is recommended that a 30 site, full amenity, destination RV campground located near the river be developed. A design that offers adequate privacy at individual sites in a scenic location would encourage overnight stays.

A marketing plan is needed to implement the success of the Site. The plan needs to focus on the touring traffic that comes from BC, Alberta, Canada, US and Europe, most notably Germany. There is an immediate potential to harvest current RV traffic in the region, augmented by efforts to attract more visitors by enticing guided tour operators and partnering with eco-tourism operators.

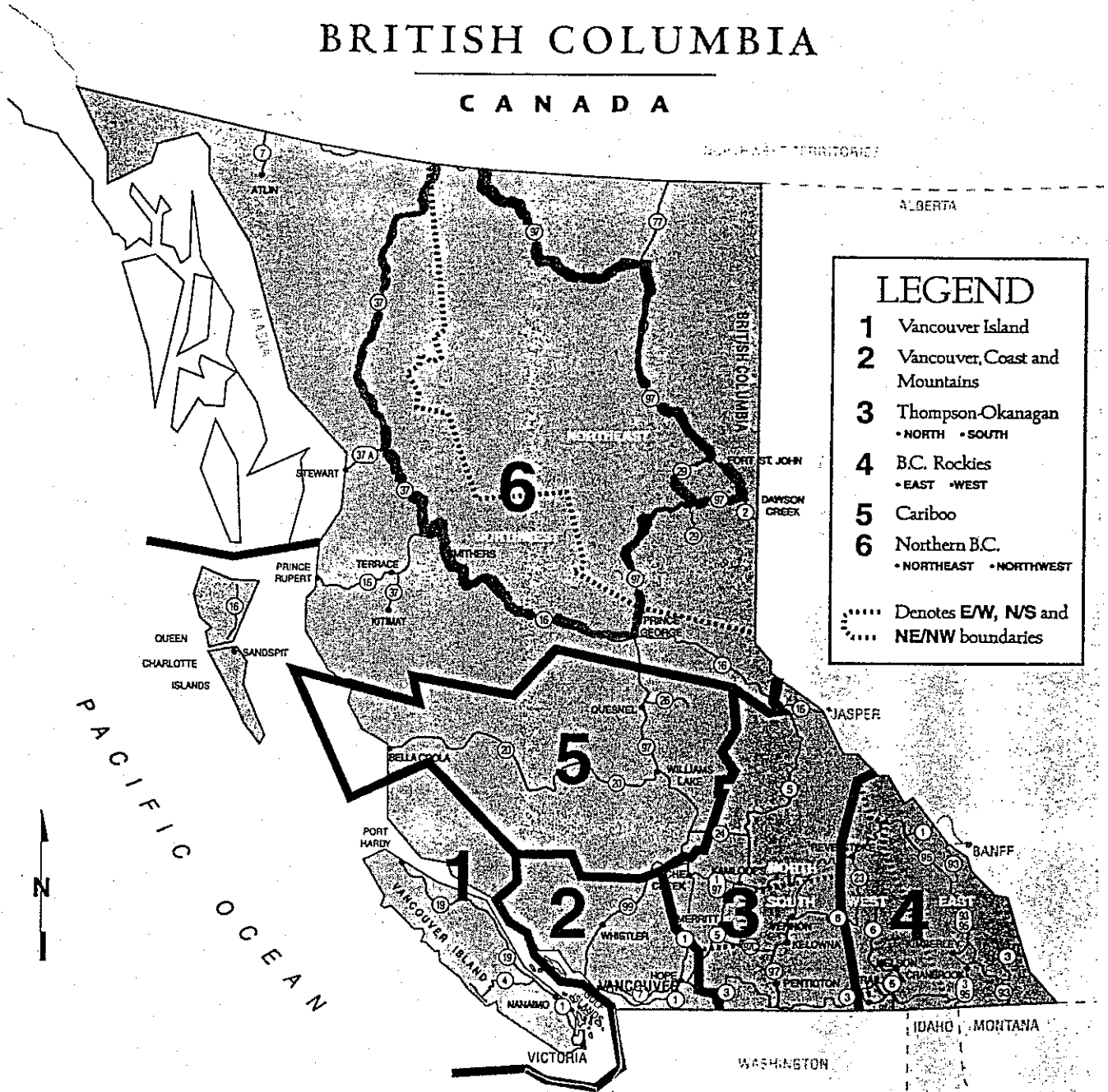


# APPENDIX A

## BC NORTHERN CIRCLE TOUR ROUTE

# BRITISH COLUMBIA

CANADA



**LEGEND**

- 1 Vancouver Island
- 2 Vancouver, Coast and Mountains
- 3 Thompson-Okanagan  
• NORTH • SOUTH
- 4 B.C. Rockies  
• EAST • WEST
- 5 Cariboo
- 6 Northern B.C.  
• NORTHEAST • NORTHWEST

..... Denotes EW, NS and  
 ..... NE/NW boundaries

NB: Information on Revelstoke is found in the *Report on Visitors to North Thompson-Okanagan*. However, since the completion of the BC Visitor Study, changes in regional boundaries result in Revelstoke now being located in the BC Rockies Tourism Region.

## APPENDIX B

### WHERE BC RESIDENTS VISITORS STAYED IN THE NORTHWEST REGION

Accommodation in the Region	Total Residents	Northern Residents
	%	%
Private home/cottage of friends/relatives	49	41
Hotel	27	30
Motel	14	16
Private campground/RV park	9	10
National/Provincial park campground	3	2
Cabin/lodge	2	3
Bed & Breakfast	2	1
Personal Boat	1	-
Resort	*	*
Other	1	1

\* Less than 1%

- Not asked/no answer

Totals exceed 100% due to multiple mentions

Source: BC Visitor Study—The Report on Visitors to Northern BC Tourism region: Northwest

## **APPENDIX C**

### **ACCOMMODATION AND ACCESS INFRASTRUCTURE INVENTORY**

#### **Transportation Infrastructure**

- Yellowhead Highway—Rated one of the ten most scenic highways in the world
- Terrace Airport—Daily flights Air Canada Regional & Hawk Air
- VIA Rail—Rail line through Terrace
- BC Ferries—via Prince Rupert 1.5-hour drive to Terrace
- Alaska Marine Highway—via Prince Rupert 1.5-hour drive to Terrace

#### **Accommodation in Terrace**

- 9 Bed and Breakfasts, 2 Lodges/Guest House, 4 Hotels, 8 Motels
- 4 Motel/RV park combinations

#### **Campgrounds**

- 6 Campgrounds accommodating 20-56 campers (1 day drive)

#### **Historical Sites**

- Kitwanga National Historic Site
- Heritage Park

#### **First Nations Cultural Venues**

- Ksan Historical Village and Museum—communal houses, totem poles, dugout canoes, carving shed, gift shop, guided tours, dance performances, food service
- Kitseguaecla First Nation Village—totem viewing
- Pike Island—petroglyph viewing
- Kispiox Indian Village—totem viewing
- House of Sim-Oi-Ghets—First Nation's arts and crafts gift shop

#### **Other Tourist Amenities in Terrace**

- 35 restaurants, 2 shopping centers

## APPENDIX D

### NORTHWEST VISITOR REPORT

Where did they come from?

<b>Non-resident visitor origin</b>	<b>Overnight Visitors</b>	<b>BC Resident Visitor Origin</b>	<b>Overnight Visitors</b>
<b>Regional Canada</b>	38%	Greater Vancouver Regional District	19%
<b>Regional US</b>	23%	Vancouver Island	10%
<b>Long Haul Canada</b>	9%	North	55%
<b>Asia/Pacific</b>	2%	South	16%
<b>Europe</b>	8%		
<b>Other Overseas</b>	3%		

*Source: BC Visitor Study—The Report on Visitors to the Northern BC Tourism Region: Northwest*

## APPENDIX E

### ACTIVITIES IN THE REGION

Activities in the Region	Non-resident total %	BC Resident %	North %
Art galleries/museums/exhibits	25	t	t
Sightseeing in city/town	16	-	-
Freshwater Fishing	15	t	t
Sightseeing in Country	9	-	-
Visiting friends/relatives	8	93	94
Zoos/natural displays/gardens	7	t	t
Hiking/backpacking	7	t	t
Nightlife	4	87	t
Resting/relaxing	5	-	-

*Note: Data on the activities of B.C. residents in the region was based on an aided question and therefore is not as extensive as the non-resident data.*

*-Not asked/no answer*

*t Denotes insufficient sample size to report findings.*

Outdoor Activities in the Province	Non-Residents %	BC Resident %	North Resident %
Land-based Activities	59	47	40
Visiting National/Provincial Parks	43	19	17
Wildlife viewing/bird watching	50	33	30
Hiking/backpacking	14	24	19
Winter activities	1	3	6
Downhill skiing	1	3	5
Fishing	16	19	17
Saltwater fishing	5	-	-
Freshwater fishing	15	-	-
Boating	-	14	13
Photography	46	38	27
Sightseeing	-	41	34
Golfing	3	12	12

Attractions/Culture/Events in the Province	Non-Resident %	BC Resident %	North Region Resident %
<i>(Net) Events</i>	12	12	9
Local Festivals/fairs/events	9	12	9
<i>(Net) Attractions</i>	57	31	25
Zoos/natural displays/gardens	24	11	6
Historic sites	43	19	12
First Nations cultural sites	26	13	8
Art galleries/museums	28	15	15
Wineries/farm tours	1	2	3

*Source: BC Visitor Study—The Report on Visitors to Northern BC Tourism Region: Northwest*

## Appendix F

### BC Parks Attendance Data 1992-2001

Park Name	Total	May.	Jun.	Jul.	Aug.	Sep.	
EXCHAMSIKS RIVER PARK	1992	1449	136	214	418	356	325
EXCHAMSIKS RIVER PARK	1993	1330	128	167	399	288	348
EXCHAMSIKS RIVER PARK	1994	1179	70	140	464	311	194
EXCHAMSIKS RIVER PARK	1995	1374	78	176	569	329	222
EXCHAMSIKS RIVER PARK	1996	1352	120	276	464	332	160
EXCHAMSIKS RIVER PARK	1997	1284	133	184	416	411	140
EXCHAMSIKS RIVER PARK	1998	1090	71	190	450	237	142
EXCHAMSIKS RIVER PARK	1999	869	57	115	368	196	153
EXCHAMSIKS RIVER PARK	2000	1180	100	190	338	244	308
EXCHAMSIKS RIVER PARK	2001	1196	78	196	388	282	252
<b>EXCHAMSIKS RIVER PARK</b>	<b>Total</b>	<b>12323</b>					
Kleanza Creek Park	1992	1453	142	281	453	440	137
Kleanza Creek Park	1993	1772	226	322	506	434	284
Kleanza Creek Park	1994	1687	151	333	575	533	95
Kleanza Creek Park	1995	1677	182	419	594	397	85
Kleanza Creek Park	1996	1963	251	349	547	516	300
Kleanza Creek Park	1997	1623	256	322	526	514	5
Kleanza Creek Park	1998	1776	274	412	518	482	90
Kleanza Creek Park	1999	1627	223	332	567	424	81
Kleanza Creek Park	2000	1630	258	349	484	444	95
Kleanza Creek Park	2001	1578	162	351	490	512	63
<b>Kleanza Creek Park</b>	<b>Total</b>	<b>16786</b>					
LAKELSE LAKE PARK	1992	8772	864	1541	3180	2590	597
LAKELSE LAKE PARK	1993	9572	1117	1383	3252	2773	1047
LAKELSE LAKE PARK	1994	9833	803	1340	3742	3255	693
LAKELSE LAKE PARK	1995	9780	1152	1852	3361	2371	1044
LAKELSE LAKE PARK	1996	9582	1018	1729	3442	2924	469
LAKELSE LAKE PARK	1997	9542	1202	1638	2916	3462	324
LAKELSE LAKE PARK	1998	10209	1303	2005	3668	2506	727
LAKELSE LAKE PARK	1999	7701	871	1037	3234	1910	649
LAKELSE LAKE PARK	2000	7556	917	1361	2679	2145	454
LAKELSE LAKE PARK	2001	7062	833	1287	2600	2089	253
<b>LAKELSE LAKE PARK</b>	<b>Total</b>	<b>89609</b>					
PRUDHOMME LAKE PARK	1992	1408	121	325	473	379	110
PRUDHOMME LAKE PARK	1993	1349	123	305	424	356	141
PRUDHOMME LAKE PARK	1994	1596	93	321	525	459	198
PRUDHOMME LAKE PARK	1995	1714	136	518	618	396	46
PRUDHOMME LAKE PARK	1996	1591	163	362	509	405	152
PRUDHOMME LAKE PARK	1997	1567	203	401	512	382	69
PRUDHOMME LAKE PARK	1998	1686	181	472	549	420	64
PRUDHOMME LAKE PARK	1999	1328	118	349	476	329	56
PRUDHOMME LAKE PARK	2000	1422	138	372	510	310	92
PRUDHOMME LAKE PARK	2001	956	81	278	318	249	30
<b>PRUDHOMME LAKE PARK</b>	<b>Total</b>	<b>14617</b>					
SEELEY LAKE PARK	1992	1470	44	320	462	417	227
SEELEY LAKE PARK	1993	1545	93	284	462	480	226
SEELEY LAKE PARK	1994	1523	57	344	461	454	207
SEELEY LAKE PARK	1995	1687	112	333	509	477	256
SEELEY LAKE PARK	1996	1470	66	333	454	424	193
SEELEY LAKE PARK	1997	1388	70	294	417	415	192
SEELEY LAKE PARK	1998	1461	82	317	481	392	189
SEELEY LAKE PARK	1999	1186	71	198	415	299	203
SEELEY LAKE PARK	2000	1069	72	187	363	289	158
SEELEY LAKE PARK	2001	1074	75	231	343	293	132
<b>SEELEY LAKE PARK</b>	<b>Total</b>	<b>13873</b>					
Tyhee Lake Park	1992	4542	224	800	1659	1475	384
Tyhee Lake Park	1993	4093	221	583	1319	1457	513
Tyhee Lake Park	1994	4545	255	678	1642	1577	393
Tyhee Lake Park	1995	4646	275	879	1589	1412	491
Tyhee Lake Park	1996	4380	267	856	1572	1379	306
Tyhee Lake Park	1997	3613	214	796	1167	1242	194
Tyhee Lake Park	1998	3519	300	767	1188	964	300
Tyhee Lake Park	1999	3020	185	515	1160	913	247
Tyhee Lake Park	2000	3151	167	528	1228	1041	187
Tyhee Lake Park	2001	3021	151	479	1202	1120	69
<b>Tyhee Lake Park</b>	<b>Total</b>	<b>38530</b>					

## APPENDIX G

### TRAVEL MOTIVATORS FOR EUROPEAN ABORIGINAL CULTURE TRAVELERS

U.K.	Germany	France
<ul style="list-style-type: none"> <li>Variety of things to do 90%</li> </ul>	<ul style="list-style-type: none"> <li>Interesting and friendly local people 92%</li> </ul>	<ul style="list-style-type: none"> <li>See or experience people from different ethnic backgrounds 96%</li> </ul>
<ul style="list-style-type: none"> <li>Interesting and friendly local people 89%</li> </ul>	<ul style="list-style-type: none"> <li>Outstanding scenery 91%</li> </ul>	<ul style="list-style-type: none"> <li>Nice weather 84%</li> </ul>
<ul style="list-style-type: none"> <li>Outstanding scenery 86%</li> </ul>	<ul style="list-style-type: none"> <li>Opportunities to increase one's knowledge 89%</li> </ul>	<ul style="list-style-type: none"> <li>Interesting and friendly local people 95%</li> </ul>
<ul style="list-style-type: none"> <li>Destinations that provide value for holiday money 86%</li> </ul>	<ul style="list-style-type: none"> <li>Environmental quality of area 88%</li> </ul>	<ul style="list-style-type: none"> <li>Outstanding scenery 94%</li> </ul>
<ul style="list-style-type: none"> <li>Opportunities to increase one's knowledge 86%</li> </ul>	<ul style="list-style-type: none"> <li>Variety of things to see and do 88%</li> </ul>	<ul style="list-style-type: none"> <li>Experiencing a different culture 93%</li> </ul>
<ul style="list-style-type: none"> <li>Personal safety even when traveling alone 85%</li> </ul>	<ul style="list-style-type: none"> <li>Nice weather 87%</li> </ul>	<ul style="list-style-type: none"> <li>Local cuisine/new foods 92%</li> </ul>
<ul style="list-style-type: none"> <li>Nice weather 87%</li> </ul>	<ul style="list-style-type: none"> <li>Personal safety 86%</li> </ul>	<ul style="list-style-type: none"> <li>Local crafts and handiworks 91%</li> </ul>
<ul style="list-style-type: none"> <li>Local cuisine/new foods 80%</li> </ul>	<ul style="list-style-type: none"> <li>Destinations that provide value for holiday money 86%</li> </ul>	<ul style="list-style-type: none"> <li>Advertised low cost excursions 91%</li> </ul>
<ul style="list-style-type: none"> <li>Inexpensive travel within the country 80%</li> </ul>	<ul style="list-style-type: none"> <li>Availability of pre-trip tourist info 83%</li> </ul>	<ul style="list-style-type: none"> <li>Increase one's knowledge 91%</li> </ul>
<ul style="list-style-type: none"> <li>Interesting small towns and villages 79%</li> </ul>	<ul style="list-style-type: none"> <li>Unique or different aboriginal or indigenous peoples 82%</li> </ul>	<ul style="list-style-type: none"> <li>See or experience unique aboriginal or native groups 90%</li> </ul>
<ul style="list-style-type: none"> <li>Inexpensive travel to the country 79%</li> </ul>		<ul style="list-style-type: none"> <li>Variety of things to see and do 90%</li> </ul>

*Source: Demand for Aboriginal Culture Products in Key European Markets 2000*

## APPENDIX H

### RECREATIONAL VEHICLE AMENITY NEEDS

#### Amenities in Demand by RV Campers in BC

1. Showers
2. Picnic tables
3. Fire Pits
4. Sani-Stations
5. Beach access (if applicable)
6. Adequate power service 30-50 amp
7. Laundromat
8. Convenience Store-Stocked with household items
9. Pull through sites

#### Mix of Desirable Amenities

**Convenience Store:** Stocked with convenience groceries and basic household items;

**Picnic Tables:** Solid and well constructed;

**Fire Pits:** Basic camping requirement;

**Swimming Pool and Recreation Building:** If attempting to offer a resort experience;

**Sani-station:** Easily accessible and preferably free;

**Pull-through Sites:** In demand for Fifth-wheel and large travel trailers;

**Reservation System:** Accept pre-bookings;

**Laundromat:** Efficient, commercial quality washers and dryers;

**Pets:** RV campers travel with pets, particularly dogs. Most RV campgrounds allow pets but their acceptance needs to be balanced against annoyance to other visitors;

**Playgrounds:** Simple, safe playground area.

*Source: British Columbia Recreational Vehicle Campground/Resort Study Phase II Highlights and Recommendations*



## APPENDIX I

### RV CAMPGROUND INVENTORY & AMENITIES IN TERRACE AREA

<b>RV Facility</b>	<b>No. of Sites</b>	<b>Water/Power</b>	<b>Fee</b>	<b>Location</b>
<i>Kalum Motel</i>	15	Yes	\$18-\$23	Urban
<i>Rainbow Motel</i>	14	Yes	\$24	Urban
<i>Water Lily Resort</i>	6	Yes	\$22	Lakeside
<i>Wild Duck Motel &amp; RV Park</i>	25	Yes	\$23	Urban

## Appendix J Visitor Growth Projections

**Current Visitors to Northwest Region**      **17,261** Composite Number of Estimated "Rubber Tire Traffic"

BC Residents		73%	12,601
Local	9%	1,134	
Greater Vancouver	19%	2,394	
Vancouver Island	10%	1,260	
North	47%	5,922	
South	16%	2,016	
Non BC Residents		27%	4,661
Regional Canada	38%	1,771	
Regional US	23%	1,072	
Long Haul Canada	9%	419	
Long Haul US	17%	792	
Asia Pacific	2%	93	
Europe	8%	373	
Other	3%	140	

### Composite Number Methodology and Assumptions

Composite number was derived using the following:  
 Yellowhead East West 50% of 6139 X 4 persons per vehicle.  
 New West-East traffic estimated 921 X 4 persons per vehicle;  
 Assumed 10% of Terrace pop. would visit annually  
 1995 BC Visitor Study place of origin estimates were used.  
 Attendance estimate projections were assumed.

### Attendance Projections as Percentage of Total Visitors to Northwest Region

BC Residents		2003	2004	2005	2006	2007
Local	0%	60%	50%	40%	40%	40%
Greater Vancouver	0%	30%	40%	50%	65%	65%
Vancouver Island	0%	30%	40%	50%	65%	65%
North	0%	20%	40%	45%	50%	50%
South	0%	25%	40%	45%	50%	50%
Non BC Residents						
Regional Canada	0%	30%	40%	65%	75%	75%
Regional US	0%	30%	40%	75%	85%	85%
Long Haul Canada	0%	30%	40%	75%	85%	85%
Long Haul US	0%	30%	50%	75%	85%	85%
Asia Pacific	0%	25%	30%	35%	40%	40%
Europe	0%	40%	50%	75%	85%	85%
Other	0%	20%	25%	40%	50%	50%

### Attendance Projections as Estimates of Visitors

		2003	2004	2005	2006	2007
BC Residents						
Local	-	680	567	454	454	454
Greater Vancouver	-	718	958	1,197	1,556	1,556
Vancouver Island	-	378	504	630	819	819
North	-	1,184	2,369	2,665	2,961	2,961
South	-	504	806	907	1,008	1,008
<b>Subtotal</b>	-	<b>3,465</b>	<b>5,204</b>	<b>5,853</b>	<b>6,798</b>	<b>6,798</b>
Non BC Residents						
Regional Canada	-	531	708	1,151	1,328	1,328
Regional US	-	322	429	804	911	911
Long Haul Canada	-	126	168	315	357	357
Long Haul US	-	238	396	594	673	673
Asia Pacific	-	23	28	33	37	37
Europe	-	149	186	280	317	317
Other	-	28	35	56	70	70
<b>Subtotal</b>	-	<b>1,417</b>	<b>1,950</b>	<b>3,232</b>	<b>3,694</b>	<b>3,694</b>
<b>TOTAL</b>	-	<b>4,882</b>	<b>7,155</b>	<b>9,085</b>	<b>10,492</b>	<b>10,492</b>

## APPENDIX K

### 2002 TOURISM CONFERENCES

Ontario Aboriginal Tourism Conference & Workshop  
Sault Ste. Marie, Ontario  
April 17-18, 2002  
[www.nonta.net](http://www.nonta.net)

Canadian Adventure Tourism Industry Conference  
University College of the Cariboo, Kamloops BC  
April 26-28, 2002  
[www.adventureconference.com](http://www.adventureconference.com)

World Eco-tourism Summit  
Quebec City, Quebec  
May 19-22, 2002  
[www.ecotourism.org](http://www.ecotourism.org)

BC Lodging & Campground Association Conference  
Kamloops, BC  
October 24-26, 2002  
[www.bcla.com](http://www.bcla.com) (to be posted on website)

National Aboriginal Tourism Conference 2003 (dates to be announced)  
Sponsored by Aboriginal Tourism Team Canada  
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