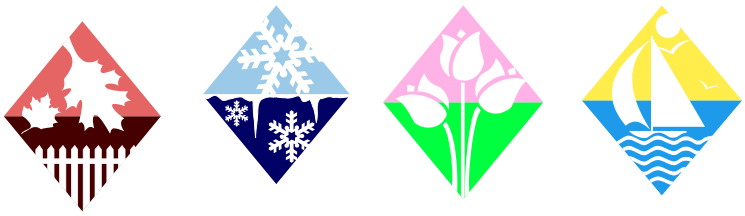
WELLS, BARKERVILLE & BOWRON LAKES

GATEWAY COOPERATIVE MARKETING STRATEGY & PLAN



prepared for the
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prepared by
Sally Lockhart
JIGSAW CONSULTING
302 666 Wilson Street
Quesnel V2J 2W4
phone: 1 250 992 9689
email: jigsawsally@hotmail.com

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1 EXECUTIVE SUMMARY

Summer of 2001 the Wells Chamber of Commerce and the Gateway Marketing Project recruited the services of Jigsaw Consulting to complete a tourism marketing strategy and plan for the Wells, Barkerville & Bowron Lakes gateway area.

This tourism marketing strategy report is part of a larger overall, community effort to increase the area's tourism market share. A Larger market share by the way of increased tourists to the area will ultimately lead to and increase in tourist dollars being spent in the local organisations.

The study involved research of the current tourism trends to British Columbia and the Cariboo region to determine the major markets visiting the area. Understanding the primary tourism products that the Wells Barkerville and Bowron Lakes has to offer and its competitive advantage to secure an increase tourism market share. Secondly a review of current marketing strategies and plans used by the Wells, Barkerville & Bowron Lakes tourism operators and local tourism marketing organisations, to determine what strategies and plans can be put in place to help the tourism operators gain maximum value for the resources invested.

From the research a primary marketing strategy was developed with the emphasis to develop greater awareness of the area through branding and image development. To promote the existing products (eco-tourism / adventure, & heritage / art & culture touring) most effectively to primary target markets (close in & regional tourism markets), to gain the maximum impact based on current resources available.

By taking advantage of existing marketing tools used by the tourism operators through greater cooperation & communication and the development of new strategies such as branding of the area and the development of a marketing cooperative the marketing strategy will address a number of the issues raised by the operators while maximising the return on current marketing resources invested.

2 INTRODUCTIONS

- **OBJECTIVES**

In the summer of 2001 the Wells Chamber Commerce retained the services of Jigsaw Consulting to review current marketing strategies of tourism operators of the area and develop a tourism marketing cooperative strategy for the Wells, Barkerville & Bowron Lakes area.

Jigsaw Consulting was contracted to review the marketing cooperative strategy based on marketing experience and having no direct or indirect affiliations of the area in review, while remaining within the Wells Chamber of Commerce's contract guidelines to contract the work within the Quesnel, Wells, Barkerville and Bowron Lakes area.

Develop an action plan to;

- Increase the current number of overnight and day trip person days especially in the shoulder and winter season.

- Develop a marketing cooperative that is functional and resource efficient to achieve the objective of goal number one.

3 CURRENT STATUS OF TOURISM

Tourism is becoming the single largest economic activity on the globe. The industry offers huge potential, yet it is also more competitive than ever. Tourism communities must be more assertive and efficient than their competitors to maintain the competitive edge. As a result planning marketing strategies is far more crucial as marketing funds and sources are disappearing. To survive communities need to learn to cooperate in order to remain competitive and to leverage the marketing investments with that of partners.

• GENERAL TOURISM TRENDS

- The fastest growing segment in tourism is the adventure and eco-tourism market
- British Columbia was viewed very favourably as a destination by the eco tourism market segment, with 32% of respondents rating BC their preferred destination.
- The single most critical factor in determining an eco- tourism destination is the natural setting.
- There is some concern over the reduced number of scheduled flights by Air Canada into British Columbia.
- Free independent travel (FIT), as compared to group and guided travel, is increasing.
- More people are booking directly with operators and developing their own packages and itineraries.
- Short “gateway” trips are increasing in absolute number and frequency.
- More people are using the Internet to plan their trips.
- Travel trade (wholesalers, travel agents and packagers) are used primarily by long haul markets, infrequently by regional markets, and practically not at all by close in markets.

NOTE:
With the recent events of September 11th 2001 the tourism market has been adversely affected. This effect will affect the operators of Wells, Barkerville & Bowron Lakes. Canadians travelling in Canada account for 70% of the Canadian Tourism Market. The international tourist the other 30%. It is anticipated with the recent events of September 11th 2001 that the International tourism will decline, while Canadians will tend to travel within Canada as will the US market, primarily those states immediately south of the Canadian border will look to Canada rather than overseas for their travel choices in the immediate future.

• PROVINCIAL TOURISM TRENDS

British Columbia visitor expenditures and volumes 1999

	Overnight visitors ('ooo's)	**volume %**	overnight revenue ($million)	**revenue %**	% change in visitor volume 1998- 1999	% change in revenue 1998 - 1999
B.C	10,654	**47.8%**	2,416	**26.3%**	0%	1.5%
Other Canada	4,828	**21%**	2,744	**29.8%**	1.7%	3.2%
United States	5,059	**22.7%**	2,329	**25.3%**	5.3%	6.8%
Mexico	59	**0.26%**	41	**0.4%**	14.4%	16.2%
Asia / Pacific	843	**3.7%**	911	**9.9%**	8.9%	11.1%
Europe	671	**3%**	683	**7.4%**	7.8%	9.3%
Other O/S	144	**.64%**	74	**0.8%**	1.6%	3.1%
Total	**22,258**		**9,197**		**2.1%**	**4.9%**

SOURCE: *The Value of Tourism* Tourism B.C. Feb 2001

Tourism revenue totaled $9.2 billion in 1999, a 4% increase over 1998. The major component of this growth is for the U.S. market (up 6.8%) whose tourism expenditures injected a $2.3 million in to the provincial economy.

Visitor spending among the key markets varied with the length of stay and per day expenditures. British Columbia residents represent 47% of the total visitor volume in 1999 but only 26% of the revenue, as they spent less on average per visit than long haul visitors. Over seas visitors contributed 18.1% of the total revenue while representing on 7.4% of the volume.

In British Columbia, Tourism is a $9.2 billion industry, the second largest industry in the province and soon to be the largest employing over 110,780 people. Accounting for 7.6% of the provincial labour force ranking fifth in employment amongst industry sectors.

Tourism is in part an export industry . Traditional exports are British Columbian goods that are shipped to markets in other countries. Tourism exports are different in that the consumers travel to British Columbia to purchase the product. In 1999 tourism was the second largest earner of income in the provincial economy after wood products with $4 billion in 1999.

• CARIBOO CHILCOTIN TOURISM TRENDS

Accommodation room revenue by tourism region

	Revenue 5 year growth %	Revenue 1999 % (total $1.3 billion)
THE ISLANDS	23.6%	17.6%
VANCOUVER, COAST & MOUNTAINS	44.4%	58.6%
THOMPSON OKANAGAN	21.0%	11.1%
B.C ROCKIES	25.9%	5.7%
CARIBOO CHILCOTIIN COAST	-0.5%	1.5%
NORTHERN B.C.	6.7%	5.5%

SOURCE: *The Value of Tourism* Tourism BC, Feb 2001

Over a five year period the growth of visitors to the Cariboo has decreased by 0.5% where as the other Tourism regions have grown dramatically at least 20% increase with the exception of Northern B.C. which increased by 6.7%

Tourism geographics and volume

There were over 30.6 million visitors to B.C. including both day and overnight visitors. Over 1.7 million visitors travelled to the Cariboo for a day or overnight during the study period, 39% were non-resident visitors, 60% of whom were residents of B.C. The region captured 6% of all B.C visitors.

NON - RESIDENT VISITOR ORIGIN	OVERNIGHT VISITORS %	B.C. RESIDENT VISITOR ORIGIN	OVERNIGHT VISITORS %
Regional Canada	31%	Greater Vancouver Regional District	37%
Regional US	28%	Vancouver Island	11%
Long Haul Canada	6%	North B.C	19%
Long Haul U.S.A	15%	South B.C	33%
Asia / Pacific	3%		
Europe	14%		
Other Overseas	3%		

SOURCE: *B.C. Visitor Study -The report on Visitors to Cariboo Tourism Region* Tourism British Columbia 1998

Non-resident regional travellers accounted for the greatest proportion of non- resident visitors to the Cariboo with a total of 59% from both regional Canada and U.S.A. The long haul North American Market made up 21% and the remaining 20% are off shore non-resident visitors to the Cariboo.

Travellers from southern B.C. and the Greater Vancouver Regional District account for the greatest proportion of travellers to the Cariboo with a total of 70%.

Expenditure & length of stay in the Cariboo

	NON - RESIDENT	B.C. RESIDENT
EXPENDITURE		
Total Cariboo Expenditures ($millions)	65	133
% of Total Expenditures (all regions)	1	5
Average per person per day expenditures ($)	36	40
Average per person per stay expenditures ($)	95	128
ESTIMATED LENGTH OF STAY	**days**	**days**
In B.C.	6.9	3.1
In Cariboo Region	2.6	3.6

SOURCE: *B.C. Visitor Study -The report on Visitors to Cariboo Tourism Region* Tourism British Columbia 1998

Tourism revenue for this region was $198 million - 2% of the tourism revenue throughout B.C. generated by non resident and resident visitors. Of this non-resident visitors generated $65million(33%) of the region's tourism revenue. Non-resident visitors spent on average $36 per day and $95 per stay in the Cariboo. Resident visitors to the Cariboo generated $133 million (67%) of the region's tourism revenue, spending on average $40 per day and $128 per stay in the region.

Non-resident visitors to the Cariboo stayed and average of 2.6 days in the region, as compared to the average length of stay of non residents in the Province overall of 6.9 days. Resident visitors to the Cariboo spent an average of 3.6 days in the region, slightly more than the average length of stay of resident travellers in the Province overall (3.1days)

Where in the Cariboo, did the traveller visit?

Non-resident visitors travelled somewhat extensively throughout the region. The southern Cariboo region the most popular destination, with 58%. Visitors to the Quesnel, Barkerville region saw 35% of non resident visitors to the region.

Resident visitor patterns are somewhat similar to the of non resident visitors. 23% of B.C residents visiting the Cariboo Chilcotin Coast region visited the Quesnel, Barkerville region.

Why does the visitor travel to the Cariboo?

The main purpose for visiting the Cariboo were for leisure purposes with 87% of non resident and 89% of B.C residents. While 11% of B.C residents and 13% of non resident overnight visitors were for business.

	Regional Can & USA %	Long Haul & over seas %	**Non Resident Total %**	**B.C. Resident Total %**
BUSINESS VISITORS	***18%***	***5%***	***13%***	***11%***
LEISURE VISITORS	***82%***	***95%***	***87%***	***89%***
Visiting family & friends	38%	26%	**31%**	**41%**
Out doors / wilderness activities	31%	15%	**23%**	**29%**
Sightseeing	26%	57%	**42%**	**7%**
Sports Events	3%		**1%**	**7%**
resting / relaxation and personal			**1%**	**7%**
shopping	1%			**4%**
attending arts, culture fairs & festivals	1%		**1%**	**3%**
Passing through or stop over		1%	**1%**	

SOURCE: *B.C. Visitor Study -The report on Visitors to Cariboo Tourism Region* Tourism British Columbia 1998

The leisure non-resident market travelling to B.C. travel for different reasons. 38% of those non-residents who are regionally located visit the area to see friends and family, while 31% journey for outdoors and wilderness activities. Where as 57% of the long haul and overseas visitors visit B.C. to go sightseeing followed with 26% travel to visit family and friends.

41% of B.C. residents travel to visit family & friends while 29% cited outdoor activities at their main reason for travel.

Demographics of the Cariboo tourist.

	REGIONAL CAN & USA %	LONG HAUL & OVER SEAS %	**NON - RESIDENT TOTAL %**	**B.C. RESIDENT TOTAL %**
EMPLOYMENT				
Employed	74%	75%	**74%**	**71%**
retired	21%	16%	**19%**	**14%**
neither working	5%	9%	**7%**	**15%**
AGE				
18 - 34	24%	21%	**12%**	**30%**
35 -54	42%	49%	**46%**	**46%**
55+	34%	30%	**42%**	**24%**
EDUCATION LEVELS				
some post secondary	85%	90%	**77%**	**55%**
high school or less	15%	10%	**13%**	**45%**
HOUSE HOLD INCOME				
< $40,000	36%	16%	**26%**	**38%**
$40,000 - $80,000	47%	43%	**46%**	**49%**
> $80,000	17%	42%	**28%**	**14%**

SOURCE: *B.C. Visitor Study -The report on Visitors to Cariboo Tourism Region* Tourism British Columbia 1998

Non-resident visitors who were on an overnight trip in B.C. and visited the Cariboo on their trip averaged 46 years of age. 46% of non - resident visitors were between the ages of 35 & 45 with 42% aged 55 years or older.
Non resident travellers to the region were typically employed (74%) with 19% retired. Over three quarters of the non-residents have at least some post secondary education. Most were from middle income house holds with 42%. The long haul and overseas markets (42%) reporting an annual income in excess of $80,000.

B.C residents averaged 44 years of age, and were more likely to be 18 to 34 years than non-resident visitors (30% versus 22%). 71% of B.C residents were employed with a further 15% not working. Over one half of B.C. resident s have had some form of post secondary education, with just under a majority (49%) were from middle income households, with another 38% earning less than $40,000 annually. Only 14% of resident tourists earn in excess of $80,000

- **MARKET OVERVIEW**

When considering the areas in which marketing resources can have the greatest impact it is important to segment the tourism market and a select the market segment that offers the best return for marketing resources spent. These market segment trend descriptions are reflective of the general BC tourism market.

Geographic location markets

CLOSE IN MARKETS

Close in markets are defined as those visitors to the area that reside in the local central BC region.

- Based on research it is the B.C. resident market is the largest traveller of B.C. Therefore the greatest number of visitors to the area are from close in markets.
- This market generally has the greatest awareness of the area with the least resistance to travel and the most persuadable to visit.
- The travel trade, or resellers of this product generally play little or no role in persuading this market segment.
- Stays from within this market segment are generally shorter but visitors are more likely to under take frequent repeat visits throughout the year.
- Expenditure per visitor, per occasion are the lowest of the market segments, the collective expenditure of this group is the largest.
- This market generally travels to the area by vehicle and are independent, unescorted travellers.

REGIONAL MARKETS

The regional market is defined as those visitors who are travelling from the lower region of BC and those provinces and states bordering BC.

- This group is the second largest group of visitors to BC.
- Awareness in this market is lower than the close in market and resistance to travelling is higher.
- Stays from this market are likely to be longer and individual expenditure per trip is higher, than from the close in market segment.
- The travel trade is likely to play a minor role in persuading this market although decreasing with Internet services.
- Overnight stays are more likely with this group thus expenditure per person, per year are higher than the close in market.
- Overall expenditure is likely to be lower than the close in markets.
- There is a significant potential to increase the amount of free independent and guided travel that originates from this market segment.
- There is also some travel as a combination of independent travel from within this market with escorted buses.

LONG HAUL MARKETS

Long haul markets refers to those markets that require significant air travel or more than one full day of vehicle travel to reach the destination of choice. The long haul market is defined as the rest of North America, the USA, and the overseas market.

- Market segment, awareness of the area is fairly low, as is the ability to persuade the market to visit the area unless it is specific to canoe the Bowron Lake Chain.
- Stays for this market tend to be longer than one day. Expenditures will be considerably greater than that of the close in market and some what greater than the regional market.
- Frequency of visits within any year will be very low as are the absolute number of visitors.
- This market does have potential, although the actual over all revenue generated will be the lowest of all the market segments and marketing costs will be the highest.

- This segment travels to BC (Vancouver) by air from offshore, with some travel from the Canadian & US markets by automobile or as part of a guided bus tour. A significant number of offshore visitors combine travel modes by flying to Calgary or Vancouver, then renting a recreational vehicle or automobile to tour Western Canada.
- This segment is most like more persuadable than many other offshore sub-segments.
- The travel trade, or resellers of this product generally play a major role in persuading this market segment, although decreasing with the internet.

Source: Cowichan Lake & the Carmanah Marketing Strategy 2001 to 2005

The Trip Occasion

PERSUADABLE MARKETS

Persuadable markets refer to those who can be persuaded, through marketing activities, to choose Wells, Barkerville & Bowron Lakes as a travel destination. Other tourists who we can call non-persuadable, travel for reasons unrelated to the attractiveness of the area. Their trips are determined by other reasons such as family & friends, business location conference or event. Directing marketing activities to the long haul market will produce little for resources allocated as their travel decisions are heavily influenced by outside factors. When developing a marketing strategy it is important to focus on the most persuadable market - the market where market resources will gain the best return.

The persuadable component of the close in and regional markets does include visitors to family & friends, as well as planing marketing efforts to influence them to stay longer and spend more money on specific activities and attractions.

RATIONALE

There are many reasons why the visitor chooses to travel to a place over another. Can they be persuaded to stay longer, to return again. Visitors purchase a “travel experience” which is often part of an occasion that takes place at a specific place and time. Therefore the occasion or the experience may be just as important as visitor characteristics in triggering the desire for travel. The visitor to Wells, Barkerville may be wish to canoe the Bowron Lake Chain in the Summer, follow the Gold Rush Trail to Barkerville or take in the Canadian Hill Climb in Winter. The trip occasion must be considered when addressing the persuadable market. This report has identified the trip occasions, or products to be experienced as:

- Heritage - Touring
- Adventure and Eco Tourism
- Destination - Bowron Lakes
- Events
- Meetings & Conferences
- Visiting Friends & Relatives

- **PRODUCTS**

To develop a marketing strategy the marketing strength and attractiveness to the market segments need to be determined. The consideration of the availability of the experience in each market, price, accessibility, image and marketing approaches are compared. Thirdly analysing each market and product match based on such external criteria that relate to the objectives such as retaining maximum return on marketing investment, seasonal spread of visitation, environmental compatibility and support of the area's culture and the speed at which the area could expect a return from the market. The product base in the Wells, Barkerville & Bowron Lakes has great potential as the primary industry is Tourism.

Eco - tourism / adventure

One of the largest products in the area with the greatest potential. The main attractions are the Bowron Lake Chain, the Bowron Lake Provincial Park, the Cariboo Mountains Park and alpine area. The Bowron Lake Chain already has great awareness for canoeing the chain both locally and internationally. This offers a strong base to build further.

Eco - Tourism is a significant, rapidly growing tourism experience or product that is not always completely understood. It is defined by Tourism Canada as;
"An outdoor leisure activity that takes place in an unusual, exotic or remote wilderness destination, involves some form of unconventional means of transport and tends to be associated with low or high levels of activity."
Included is experiencing, viewing and studying areas of unique natural beauty, the flora, fauna and topography of natural eco-systems as well experiencing indigenous societies and their culture.

The trip duration can last anywhere from one afternoon to several weeks and may include numerous activities. The market for this product can be divided into two groups.

Eco - Tourism: General Traveller

- Seeks less adventuresome experience
- Hiking is preferred activity followed by touring
- Mid range accommodation quality preferred with hotel / motel facilities
- Wants to combine eco- tourism experiences with other such visits.
- Somewhat less educated that the experience traveller
- Covers all age groups with 25 to 53 years of age being dominant
- Most likely to live in a family group or as couples

Eco - Tourism: Experienced Traveller

- Seeks more strenuous activities
- Preferred activities include cross country skiing, back country skiing, mountain biking, snow shoeing, canoeing & hiking.
- More concerned with the experience less concerned with accommodations preferring accommodation that is smaller and less conventional.
- Considerably more educated.
- Covers all age groups.

Touring - heritage / art & culture

This category of product is defined as mobile sightseeing with the primary purpose of viewing unique and beautiful landscapes, fauna & flora and different attractions and cultures.
Touring is predominantly a large part of the area as most touring is to the Barkerville Heritage Park. There are numerous bus tours primarily visiting Barkerville for the day that has hourly tours of the park. There are numerous other attractions associated with the areas heritage such as gold mining tours, gold mining experiences. The potential development of a period gambling hall that can be further developed to enhance the experience of heritage tourism.
Touring is also closely related to eco tourism. There is some back country hiking tours and canoe tours of the Bowron Lakes. There is opportunity to increase this product offering. It offers potential for packaging with accommodation and other activities and services.

This segment can be defined into two categories

- Independent (FIT)

This is the free independent travel of individuals, couples or family who usually plan their own itinerary without the aid of tour wholesalers. They travel by automobile or motor home, either owned or rented.

- Guided: Motor coach / other transport

Guided touring is usually a group tour based on a specific itinerary, planned and pre-purchased by tour operators and then resold to the consumer. Travel is by bus, boat or a similar vehicle.

Destination resort

Destination travel refers to the purchase of a holiday experience with or without numerous activities that usually takes place within a specific resort. The primary reason for travel is to experience what the particular resort offers. Ski lodges, golf resorts and guest ranches are examples.
There are some products in the area primarily at Bowron Lakes to canoe the Bowron Lakes Barkerville offers the same usually only on an overnight experience, although very limited. The potential for future development of destination options is very good. Further investigation and development of more destination options such as the casino, adventure tourism and conference centre will build the Wells, Barkerville & Bowron Lakes as a destination resort.

Events

This product includes travel to participate in a specific event. These events include such things as country fairs, competitive races, theatre events, rodeos, festivals, tournaments and more. The event is the primary reason for the trip.
Currently there are a number of events in the area that could be enhanced for the close in and regional markets. Events based in Wells and Barkerville offer significant potential for regional and close in markets. Events offer the opportunity for repeat visits for close in and regional markets. Due to the uniqueness of Barkerville Heritage Park and Bowron Lake Canoe circuit there is the potential to develop major national or international events associated with the area.

Meetings / Conferences

Meetings and Conferences are generally associated with business events. However, they need not necessarily be business oriented. They may include events that draw people together for mutual discussion and learning on any particular topic such symposiums do. They even include “Trekkie” and UFO conventions.

Currently there is an operator offering an art & culture educational product. In the last few years there have been some meetings or conferences from outside organisations taking place although there are very limited facilities capable of hosting large conferences. However the renovations of the Wells Community Hall offers potential for small group meetings (business retreats). The most appropriate market is the close in & regional markets.

Visiting friends and relatives

Is a visit for the specific purpose of meeting friends and relatives.

Visiting friends and relatives is not a highly persuadable market and does not generate significant revenue. The product for this market is self defined. The local market in the Cariboo sees a lot of friends and relatives visiting Barkerville Heritage Park for the day. This is where the area has many repeat visits for the close in local market living in the area.

- **TOURISM PLANT CAPACITY & UTILISATION**

Developing a marketing strategy it is important to assess the current capacity of the existing tourism plant, this is basically reviewing the accommodation and what is available to the tourism market.

Fixed roof
WELLS
Hotels & Motels - units - 69 & capacity - 201
Bed & Breakfast - units - 14 & capacity - 27
BARKERVILLE
Hotels & Motels - units - 7 & capacity - 14
Bed & Breakfast - units - 6 & capacity - 14
BOWRON LAKE
Lodges - units - 25 & capacity - 89
Others - units - 3 & capacity - 16

- Wells has the capacity to accommodate tour buses although the accommodation standards do not meet the requirements & standards set by the bus tours.
- There are no back packer type of accommodation available in Wells, Barkerville & Bowron Lakes.

Camp grounds
Provincial Parks - sites 181
Wells - sites 39
Bowron Lakes - sites 71

Source: Measuring Our Success II 1999

- ## ACCESS & TRANSPORTATION

Access and transport is a key factor to any marketing plan and is often an issue connecting the market place with the product.

Highway access
Vehicle access is the primary access to Wells, Barkerville & Bowron Lakes. Highway access is good to Wells, Barkerville, Bowron Lakes turning off from Highway 97 at Quesnel BC. The gate way is off the main traffic route of the Fraser Highway travelling North & South. Highway 16 is the only road into the Gateway and is 88 kilometres from the Quesnel turn off.

Air access
All long haul markets travel via air usually to Vancouver. The nearest airport is Quesnel airport which has three scheduled flights per day although still requiring travel to Wells, Barkerville, Bowron Lakes via vehicle.

Bowron Lakes & Wells has float plane access and Barkerville has a airfield this allows for private and small planes to land in the area. This air access opens the opportunity for the high end income niche market.

Rail access
The BC passenger rail (Cariboo Prospector) from Vancouver to Prince George stops in Quesnel. Again the visitor must travel via vehicle to Wells, Barkerville & Bowron Lakes from Quesnel. The BC tourist train that travels over three days from Vancouver to Prince George, it does not stop in Quesnel although Wells, Barkerville, Bowron Lakes is only 2 hours south east by road from Prince George. The future of passenger rail to interior BC is under threat.

- Most long haul North American & regional markets visit the Wells, Barkerville, Bowron Lakes passing through on their way North / South to Alaska.
- The Wells, Barkerville & Bowron Lakes is not considered a destination resort with the exception of those travellers who visited the area to canoe the Bowron Lake chain.

- ## THE TOURISM TEAM

Tourism is not a business where a single operator or area can go it alone. Competition is fierce and there are many smart and experienced people out there ready to take your share of the business and add to their own.
Budgets are meagre and are not likely to expand in the near future. There is how ever a large team that an operator can work with to achieve a greater slice of the market share to the area. Like any team it is organised with players who have distinct roles and functions When each team plays its role without duplicating that of another team member, it is more likely to be successful.

Team Players

The tourism marketing team is composed of several types of players, each with a specific role and responsibility.

- *Private Sector Supplier (PSS)* - this is the individual tourism business, such as a guided tour operator or an accommodations provider.
- *Destination Marketing Organisation (DMO)* - such as the Cariboo Chilcotin Coast Tourism Board, North Cariboo Marketing Cooperative, Gold Rush Trail, Wells, Barkerville & Bowron Lakes Gateway Marketing group, etc.
- *Provincial Marketing Organisation (PMO)* - is the marketing arm of Tourism B.C.
- *National Tourism Organisation (NTO)* - in Canada, is Tourism Canada

Each of these organisations do work with each other, but each one also has a role that is specific to it, or in which it takes a leadership position. This prevents duplication of effort and also focuses those organisations with larger budgets, to address the more expensive marketing tasks.

Role of the Team Players

PRIVATE SECTOR SUPPLIERS (PSS)

These organisations supply the tangible goods and services required by the tourism industry and therefore are responsible for a good proportion of the travel experience sought by the customer. Private sector suppliers are not limited to those inside the province and include tour wholesalers, tour operators, travel agents and auto clubs who operate outside of the province. The role of the PSS is to;

- Provide product and service excellence
- Provide marketing in regard to point of sale
- Participate with DMOs in developing sustaining markets
- Participate in consortium activity where appropriate;
- Take the lead role with DMOs and PMO, in organising and collectively marketing with the British Columbia client.

DESTINATION MARKETING ORGANISATION (DMO)

There are at least three kinds of destination marketing organisations, all of them working to develop awareness of the variety and value of places to visit in BC. These may be geographically based marketing entities such as visitor and convention bureaus. Some are organised to target specific vertical markets, such as people interested in skiing, golfing or other activity. Others are private sector organisations, which may focus on either geographic or sectoral marketing. The role of the DMO is to;

- Participate in marketing activities in growing markets and / or segments
- Take the lead role in attracting vertical markets and sustaining geographic markets
- Support the activities of the PMO in developing new markets
- Be ready to take advantage of opportunity marketing.

PROVINCIAL MARKETING ORGANISATION (PMO)

The primary focus of the PMO is to create a positive awareness of British Columbia as a travel destination and generate a desire to travel here. The lead role of the PMO is;

- Position British Columbia - that is, create a certain kind of perception of the province - in alignment with the type of experience that the potential visitor desires.
- Identify and target new markets and / or market segments
- Begin the marketing cycle in new markets
- Act as a leading partner in growth markets
- Undertake activities that are not practical for DMO or PSS partners
- Help other players sustain markets that are already developed.
- Be ready to take advantage of opportunity marketing.

NATIONAL TOURISM ORGANISATION

The NTO is responsible for creating awareness of Canada as a tourist destination in markets at long distance form British Columbia. Those that are already developing and those that are expected to emerge in the future. It will take a leadership role in the following areas;

- Researching and screening target markets, and matching different tourism products to various segments of the target market
- Building awareness and an image of Canada in long haul markets
- Creating a desire to travel to Canada in key market segments in long haul markets
- Supporting other industry players by coordinating joint marketing efforts, by encouraging world-class product development, and by providing supportive market research and evaluation.

ROLE OF THE KEY PLAYERS ON THE MARKETING TEAM

4 STRATEGIC ELEMENTS

SWOT ANALYSIS

- **Strengths**
  - Barkerville a major living heritage site of Canada
  - Bowron Lakes Chain is a unique and internationally known
  - Combination of adventure, heritage and Art & Culture
  - On the Alaska highway
  - Destination of the Gold Rush Trail program
  - Location is central British Columbia
  - Eco - tourism and heritage / culture - tourism are the areas strongest product
  - Current awareness exists for the Bowron Lake Chain and Barkerville Heritage Park.
  - Community cooperation and communication
  - Rocky Mountain Loop Tour / Totem Tour of West Coast and Interior BC, 3100 Likely Loop
  - The industry Tourism Team especially the DMOs
  - The existing trail system
- **Weaknesses**
  - One way in and out, is the end of the road, only major access is by road
  - The size of the community- same people wearing many hats
  - Parks and Heritage sites are provincially operated
  - Complacency & lack of cooperation
  - Limited facilities for large functions for meetings / conferences
  - Little or no packaging of products
  - Lack of experience in tourism and service industries, from both a marketing and product development and delivery perspective.
  - Low awareness of close in, regional and long haul markets
  - No major destination resort and no destination business
  - Lack of tourism plant that meet the standards of guided touring needs.
- **Opportunities**
  - Jack of Clubs Casino project
  - Potential road access to McBride - make another circle tourism route.
  - Trail System continued expansion.
  - Working and marketing cooperatively
  - Community Spirit
  - Cooperation of Operators in the area and Quesnel
  - Existing Structures & infrastructure development
  - Events & program development
  - Partnerships with the private industry, government and stake holders
  - Other industries - niche education industries such as Island Mountain Arts & Community Wood Enterprise Centre
- **Threats**
  - Complacency not wanting to grow and change
  - Relying on Government input and funding
  - Not cooperating and working together and developing partnerships
  - Government regulations and red tape.

• WELLS, BARKERVILLE & BOWRON LAKES AREA ISSUES

From the interview there were a number of issues that came out of the survey that the area needs to address to effectively market the area to gain the greatest value from the marketing resources spent.

Communication

Tourism operators commented that there is a lack of communication between each other. Although it has vastly improved over the last five years. The poor communication is the sharing of information between operators and being able to sell the area to the visitor or developing greater awareness of the area.

Coordination & Cooperation

There is a greater need for better cooperation. Especially since the need to gain the competitive edge in the tourism market requires a lot of cooperation and coordination between the tourism operators and other team players greater coordination and cooperation of promotion, events, advertising and marketing strategies is required. Many of the tourism operators make great use of some marketing and tools although could gain far greater return by cooperating with each other and better coordination with in the area.

Consistency / Commitment

The need for greater consistency between tour operators is important as the development of a brand an image of the area requires a level of consistency and commitment from the tour operators to gain maximum efficiency from resources invested. It is the tour operators that reflect and project the image of the area.

Competition

The tourism industry is a highly competitive industry and competition for the visitor to British Columbia is fierce. Thus competition between tour operators in the Wells Barkerville and Bowron Lakes can often be detrimental to the area. The operators need to work together to attract greater share of the British Columbian Tourism market to the Wells, Barkerville & Bowron Lakes area.

• MAJOR STRATEGIC ANGLES

The following strategic angles will set the guidelines for the marketing strategy and establish priorities when marketing the area collectively. Those operators who are more market specific and have niche markets will have different priorities. The major strategic angles are to assist in the overall marketing of the entire area and take into consideration tourism trends as well as resources allocated to gain the best value.

Market considerations
To achieve the greatest return in the shortest period of time and considering the current market trends. There is a need to focus the promotional message in two major markets, close in and regional. For close-in markets, there is a need to develop partnerships with other tourism operators within the area. To reach the regional and

North American Long haul requires partnership with other destination marketing organisations.

40% of resources on close in markets
55% of resources on regional markets
5% of resources on long haul markets

Product Consideration

To gain maximum value there is a need to enter the market, marketing the areas strongest products which are adventure - eco tourism and heritage / art & culture touring.
80 % of message on adventure / eco tourism and heritage / art & culture tourism
15 % of message on events (close in and regional markets)
5 % of message on other products (markets to be determined)

Awareness vs Product

Awareness come before purchase of product in the purchase cycle. The decision making time between awareness and decision is considerably shorter in the close in and regional markets than in the long haul market. Therefore, customers must quickly become aware of opportunities to make their decisions.
60% promoting brand awareness
40% promoting product

Marketing & communication tools

Due to the limited resources it is necessary to ensure the marketing and communication tools where possible, can serve more than one market and can present more than one product. Secondly the operators need to gain the most value from existing marketing tools being used to market the area.

- ## MARKETING OBJECTIVE

- To increase the current number of overnight and day trip person days especially in the shoulder and winter season.
- To develop a marketing cooperative that is functional and resource efficient yet achieving the objective of goal number one.

- ## MARKETING STRATEGY

Priority target markets

1 First Priority Market	Close in Markets Cariboo Chilcotin Coast, Lower Mainland
2 Second Priority Market	Regional Market Canada and USA Vancouver Victoria, Clagary, Edmonton, Seattle & Portland
3 Third Priority Market	Long Haul Market Rest of Canada & USA
4 Forth Priority Market	Long Haul Market Overseas Market

This priority target markets are designed for the Wells, Barkerville & Bowron Lakes area, understanding there are some operators who have specific niche markets and

need to concentrate on those markets. It is also important for them to consider the marketing strategy, and to work cooperatively as a whole to ensure that awareness of the area through branding and image and marketing cooperatively is a part of their overall marketing strategy.

5 MARKETING ISSUES

The marketing issues can be viewed as the major marketing strategies that Wells Barkerville & Bowron Lakes need to address and implement over a period of time. To ensure the area becomes more competitive in attaining a greater share of the tourism market.

- **MARKETING COOPERATIVE**

The need to work together is stronger than ever. Marketing is one avenue that an area such as the Wells, Barkerville & Bowron Lakes area can gain valuable market share in the tourism market. By working together the resources remain the same the advantage is the added value that an operator gains from working their resources collectively.
There are numerous tourism operators in the area that are successfully marketing cooperatively. These need to be fostered and developed to expand the cooperative marketing concept and its advantages.
The marketing cooperative needs to work closely with other DMO's and similar marketing cooperatives.

Potential Stake holders

- There are DMO's such as the North Cariboo Marketing Strategy that is in place and is predominantly funded by Barkerville Heritage Park and the City of Quesnel.
- Cariboo Chilcotin Coast Tourism Association be a major DMO to assist in marketing the area
- Gold Rush Trail project considering the destination of the trail is the Wells, Barkerville and Bowron Lakes area and creating greater awareness of the area along the Trail.
- The Jack of Clubs Casino Project has the potential to offer some valuable resources to the marketing the community specifically in creating greater awareness of the area and can play a major role in the development and promotion of branding & image of the Wells, Barkerville and Bowron Lakes area.
- The Wells Chamber of Commerce be the major contributor to the development of an area marketing cooperative as the primary industry in the area is tourism.
- The participation of all tourism & business operators of Wells, Barkerville and Bowron Lakes most important as it is this group who will gain the most benefit from cooperative marketing.
- Others such as other industry partners (ie the lumber industry) and public partners (ie BC Parks and BC Heritage) and community groups.

Recommendations

- Encourage current marketing cooperative initiatives that are currently operating in the Wells, Barkerville & Bowron Lakes area.
- Promote the benefits of marketing cooperatively
- Develop cooperative marketing ideas and foster through work shops and education
- Bring together interested tourism operators of Wells, Barkerville & Bowron Lakes together to start establishing a format for a marketing cooperative
- Develop a marketing cooperative strategy
- Develop the marketing cooperative constitution
- Work closely with the DMO's especially those currently in place.

• BRANDING AND IMAGE OF THE AREA

The area of Wells, Barkerville & Bowron Lakes needs to develop and area image and brand the area to bring Wells, Barkerville & Bowron Lakes together.
The image or brand must be based on reality and must be unique in that it differentiates the area from the competition. It must appeal to the main market segments and have a sense of personality. Hopefully be able to communicate a powerful but simple idea that has already claimed some real interest in the mind of the customer.
The brand should be built on the most significant product base of the area, adventure & eco - tourism, heritage and the art & culture. While it should recognise the most unique products of the area it should also promise a discovery of many more hidden treasures. It should bring the three communities together and to better identify the area of Wells, Barkerville and Bowron Lakes

Recommendations

- Bring major stake holders together to form a strategy group to develop a strategy and plan.
- Coordinate the community to develop a brand or image of the area.
- Develop an image and brand concept that represents the area and the main products of the area. It needs to be simple and portrays the assets of the area.
  Examples "Canada eh! But have you seen Canada AHA?"
  "Another world in your backyard"
  "Discover a new world next door"
- Establish guide lines when using marketing & promotion tools and collectively brand the area using the existing resources of current marketing tools used by the operators of Wells, Barkerville & Bowron Lakes.
- Formulate a marketing strategy to get the awareness and branding image to target the market priorities.
- Develop a lure or discovery guide brochure that reflects the entire area and promoting the image of the area. To be distributed to regional USA and Canada.

• PACKAGING OF PRODUCT

There is some packaging of products in the Wells, Barkerville & Bowron Lakes although very limited. Such as tour and accommodation operators working together in developing events and holiday packages. Often the packaging of products is good although the marketing of the packages is poor and does not reach the required market. There is a great potential to package a great range of products and programs.

Recommendations

- Education on packaging of products through workshops
- Develop packaged products to fit current markets and attract new markets
- Develop a marketing & promotional plan for products considering current marketing tools in use and new avenues.

- **EVENT PROMOTION**

EVENT	LOCATION	DATE	MARKET TYPE
Dog Sled Races / Winter carnival - family event	Wells	January - last weekend	close in & some regional attending
The Great Canadian Hill Climb (snowmobile) - provincial event	Wells / Barkerville	March	close in & regional attending & competing
30's Dance	Wells	May	close in
Hose & carriage races	Barkerville		close in
Fred Wells Days - family event	Wells	August - long weekend	close in
Tinman Triathlon - community event	Wells	August - long weekend	close in
Dominion Day	Barkerville / Quesnel	July 1st	close in
Gold Panning Championships	Barkerville	August - 3rd weekend	close in and regional both attending & competing
Mid Autumn Festival	Barkerville		close in
Ghostly Town Tour - community event	Barkerville	October 31st	close in
Old Fashion Christmas - community event	Barkerville	December	close in

The Wells, Barkerville & Bowron Lakes have a number of events through out the year. The primary aim of events is to encourage the visitor to visit the area for a specific reason primary market is the close in market and encourage the repeat visit.

Recommendations

- Better coordination of events and event planning
- Develop a consistent format that will reduce the work load of event management and coordination.
- Developing innovative ways to promote events such as:

- Have all events listed in community event listings with the Quesnel, Williams Lake, 100 Mile House and Prince George Tourism Offices and other community event listings such as Recreation and Community Guides and papers.
- Use other close in community events to help promote the event such as Billy Barker Days promoting the Fred Wells Days.
- Better use of current advertising material.

- Using events to promote the area of Wells Barkerville and Bowron Lakes.
- Develop new events for the area that promote the area. Potentially have the opportunity of holding events that are unique to the area. Such as the international gold panning championships and create greater exposure across all market segments, and gain direct and indirect injection of resources from such an event.

• WINTER / SHOULDER SEASON

The tourism operators of the Wells, Barkerville and Bowron Lakes indicated that the area requires greater marketing during the shoulder seasons and winter, with the intention to have a tourists visiting the area year round.
There is great potential here as the area hosts a the Canadian Hill Climb and numerous other events.

Recommendations

- Primarily concentrate on the close in market especially the Cariboo area and their existing snowmobile markets.
- Design a trail map that takes in all snow mobile, cross country skiing and snow shoeing trails and winter activities the area has to offer.
- Incorporate the winter season in the branding and image of the area, concentrating on the eco- tourism/ adventure product.
- Market the winter events effectively especially in the Cariboo region.
- The shoulder season need to develop programs and events that are directed niche markets.
- Packaging and promotion of the area to your existing markets and build up current markets.

• AREA BEAUTIFICATION

The Wells Chamber of Commerce has undertaken an area beautification plan. There are a number of projects within the area beautification plan that are relative low cost and requires cooperation and coordination to beautify the Wells Community to improve the gateway entry. Concentrate on projects that have the greatest impact and do not require large resources and can start moving towards the goals set and overcome some of the issues identified.

Recommendations

- Work in conjunction with the Community beautification plan.
- Major project work refer to the area beautification plan giving priority to those that will have the most impact and commence working on those projects as community projects (similar to the Golden Foot Bridge project on a smaller scale)
- Look at the low cost projects and commence work on those.
- Review other options that are outside the plan or can help improve the community

- Beautification of main streets by planting flower boxes and hangers by the operators located on streets.
- Clean up of yards and blocks encouraged by participating communities in bloom projects.
- Community clean up programs - working with road companies and partners

- Develop by laws and regulations that require new buildings to be period dated and have a theme of the Wells area include colour schemes.

6 MARKETING TOOLS

The tourism operators use many existing marketing tools to promote the Wells, Barkerville & Bowron Lakes area. With some coordinated marketing and cooperation from the operators the area could gain greater value for existing resources allocated by the tourism operators. The following recommendations are for better use of tools by marketing collectively with the development of a brand and image strategy.

- **BROCHURE & FLYER DEVELOPMENT**

Most Wells, Barkerville & Bowron Lakes tourism operators produce a brochure or some form of information flyer on the operation or service provided either in house or professionally produced. There are some who do not produce flyers.

- The restaurants in the area use their menus as a brochure and information resource. Although this brochure is laid out as a menu. It fails to describe the location and atmosphere of the business.
- The Accommodation houses & tourist service operators predominantly distribute their brochures through the Tourist information centres mainly in Quesnel, Williams Lake, Prince George and the local area.

Recommendations

- Branding of the area - To have all Wells Barkerville & Bowron Lakes tourist operators incorporate the area branding image strategy on the front of their brochures taking up 1/8th of the front cover in the top right hand corner. This has the potential to gain greater awareness of the area by incorporating the branding & image strategy
- Marketing Cooperative - Work with local printing organisations to gain a % discount on printing for cooperative members.
- Tourist operators that have common interests develop a collective brochure to use. For example the artists of the area develop a cooperative brochure. Cheaper and produce more.

- **PRINT ADVERTISING**

Most tourist operators participate in some form of print advertising in various forms of newspapers, tourism and accommodation guides, specific market guides such as canoeing, snowmobile and art guides.
The operators who do participate in print advertising use a minimum of 2 to 3 media forms of print.
Most operators indicated they participated in the following publications;

- Quesnel Visitors Guide
- 100 things to do in Quesnel
- Quesnel Observer
- Wells Community News
- Williams Lake Tribune
- Prince George Citizen

Recommendations

- Branding of the area - To have all operators incorporate the area's branding image incorporated in the ad with minimum add space in top right hand corner.
- Marketing Cooperative - Work collectively to purchase add space in specific publications. Thus gaining a cheaper rate and having a collective space creates a greater impact in the publication rather than having individual ads located throughout the publication.
- Branding the area - by collectively coordinating publication space can better market the image of the area. This creates greater awareness using the branding & strategy image.
- Packaging - There are a number of operators that advertise in vertical market publications such as snowmobile, camping or art publications. By packaging together a touring operator with an accommodation operator for example and by combining resources the ad publication will gain greater value and exposure.

- **SIGNAGE**

Signage in the Wells, Barkerville and Bowron Lakes is an issue raised by most operators interviewed.

- Signage on Highway 16 to Wells, Barkerville & Bowron Lakes is adhoc with no consistency
- Signage on Highway 16 are not effectively maintained and require maintenance. Signs that are under repair or have fallen down indicate more negative impact than a positive impact
- Signage is incorrectly designed for the reading market of the sign . Such as road side and billboard signs designed for the rubber tyre market.
- Signage in Wells is inconsistent and ineffective and the area has no bylaws or policy for minimum signage standards.
- Wells beautification project indicates the need for an appropriate signage to indicate entry into Wells

Existing signage projects

RED ROOF SIGN PROJECT

- Purpose is to provide information at sites of interest such as maps and history of the area and local businesses and operators.
- Located from Quesnel along highway 26 identifying sites of interest The red roof signage that is more informational at areas of interest .
- Designed to be read by the tourist stopping at the point of interest to find out more information and for marker identification of major buildings and locations.

LARGE PINE STRUCTURE PROJECT

- These structures are designed for identifying major tours venues and sites such the vintage machinery park and the Cottonwood site
- Large signage area is to identify the attraction to the rubber tyre traffic
- These signs are constructed in partnership with the Wood Enterprise Centre in
- Quesnel

NORTH CARIBOO MARKETING COOPERATIVE SIGNAGE PROJECT

- Signs installed for Gold Rush Trail and North Cariboo Signs on high way 97

Recommendations

- That operators receive education and training on signage marketing and basic sign design.
- Have coordination from all operators with regards to signage in the area
- The area develop standards for signage for the Gateway area such a font size, number of words, size of signage and signage maintenance.
- Wells to develop by laws on signage standards for the district.
- Develop a signage maintenance program for the area.
- Branding of the area - each sign needs to have a minimum of 1/8th of signage space for area branding image.
- Branding of the area - collective develop a road side signage campaign for the area over a period of years.
- Branding of the area - Working with the North Cariboo Marketing Strategy signage program develop a long term signage strategy to brand the area throughout the regional marketing area, commencing at the turn off to Wells, Barkerville and Bowron Lakes with two large billboards signifying the gateway to the area then develop a long term strategy of placing signs throughout the province and neighbouring provinces and states.

- **INTERNET DEVELOPMENT**

The internet is becoming the preferred medium to communicate around the word, as it is easily accessible and can be relatively cheap, it is instant and a dynamic media form that can be accessed almost anywhere in the world unlike other media forms that are restricted to regions by technology and regulations.

- The internet is becoming the preferred choice of customers to research, build and purchase their travel itineraries.
- The internet is a combination of brand awareness and product information.
- There are many operators using the internet in various forms from operators having a complete highly develop site with on line booking systems to others having contact information on the community wellsbc.com website.
- The internet can be a far more effective tool in marketing the Wells Barkerville & Bowron Lakes area.

Recommendations

- Workshop on developing and designing internet marketing of the tourism market.
- With the large number of website users it would be valuable to develop a internet marketing strategy incorporating all the operators of the area.
- Marketing Cooperative - Numerous operators are paying individually to have their own website linked to the PMO and DMO websites. A more efficient would be to better develop the wellsbc.com website and have everyone linked and promoted better and contribute to have the one website linked to all the PMO, DMO, Accommodation, Touring and other suitable website links. Rather than each individual paying fees only one fee is paid by the marketing cooperative and the same value is gained.
- Develop the wells.bc website into a more tourism cooperative website with packaging products.
- Marketing Cooperative - Develop a cooperative data base for information sharing and communication, central booking system, branding of the area, etc.

- **TRADE SHOWS**

There are numerous operators who attend different trade shows through out the year. There are a variety of trade shows varying from art, Recreational, Tourism and convention, tourism industry trade shows and exhibitions all over Western Canada, USA predominantly North West USA and overseas - Germany. Of those surveyed the number of different trade shows and exhibitions attended were approximately 20

Recommendations

- Branding of the area - Develop an area brand and image display and have it incorporated in each trade show and exhibition.
- Marketing Cooperative - Coordinate collectively to have the area brand and image promoted at shows & exhibitions.
- Marketing Cooperative - Those operators who market at the same trade shows and exhibitions work together to have combined displays or booths located together to gain greater impact at the show or exhibition.

- **FAMILIARISATION TOURS**

These are important especially for educating the operators of the tourist information centres in the Cariboo region. It is a great opportunity for operators to display and share information. The Tourism Information Offices are often the first point of contact in the local area that can persuade the tourist.
Operators need to take advantage of the current resources available and not take them for granted.

Recommendations

- Work with the local Quesnel Tourist information centre and coordinate a tour where operators from all Cariboo region offices visit the area.
- Develop a mini tourism forum where all information can be shared as part of the tour.
- Marketing Cooperative - Tour operators need to take greater advantage of the current familiarisation tours visiting the area and have greater involvement.
- Marketing Cooperative - Collectively develop a virtual familiarisation tour and market it to all tour service providers, wholesalers, agents and sellers.
- Marketing Cooperative - Develop a strong communication link with the major Cariboo Tourist Information Centres and ensure they receive up to date information what is happening in the Wells, Barkerville & Bowron Lakes area.

7 FISCAL SUMMARY

- **REVIEW OF ESTIMATED ANNUAL MARKETING RESOURCES BY OPERATORS OF WELLS, BARKERVILLE & BOWRON LAKES.**

Of the 36 business operators surveyed 30 operators indicated approximate budget figures spent on marketing. The total amount of indicated spending on marketing is $135,000 annually. This amount includes the marketing budget of $40,000 allocated to the North Cariboo Marketing Cooperative by the Barkerville Heritage Park, it does not include other resources allocated by other organisations to the North Cariboo Marketing Cooperative. It does not include any marketing funding allocated by any of the operators who either responded with a % of sales or did not give a response.

The approximate marketing spending amount indicated comes directly from the Private Sector Suppliers (operators) and does not include any funding or resources from any other of the Tourism Team players such as Destination Marketing Organisations, Provincial Marketing Organisations or National Tourism Organisations with the exception of $40,000 from the Barkerville Heritage Park.

The average amount of resources allocated to marketing is approximately $3,000 this does not include the $40,000 allocated by the Barkerville Heritage Park.

Considering all the operators involved a conservative estimate of $120,000 is allocated to marketing & promotion annually by the operators of Wells, Barkerville & Bowron Lakes. This is not including the $40,000 allocated by Barkerville Heritage Park. **Note** This is an approximate estimation based on information collected from the Wells, Barkerville & Bowron Lakes operators marketing survey.

8 SUMMARY OF RECOMMENDATIONS

At the present time, this document represents a series of proposal related to the cooperative marketing strategy for the Wells, Barkerville and Bowron Lakes Area.

The following information summarises each of the issues and recommendations contained in the report. In interpreting the cost and priority columns, the following definitions are relevant.

Markets or/& awareness & product, concentrates on markets and the level of awareness and product, many recommendations will not indicate any as they are structural recommendations.

Who, refers to who is going to implement the recommendation. This report has built the basic working structure, it is going to take the entire community of Wells, Barkerville & Bowron Lakes working collectively and contribute to make the marketing strategy work. It is the community and operators best interest and who will benefit by working together communicating, coordinating and developing consistencies so the entire area is a competitive force in the British Columbian Tourism Market.

Issues are listed with each recommendations, to indicate which will assist in overcoming the issues the community has identified.

Priorities for implementation

immediate	- within 1 year
short term	- within 2 to 3 years
long term	- within 5 years

Costs are presented in three categories

minimal	- less than $500
moderate	- $500 to $2,000
high	- $2,000 to $10,000
very high	- greater than $10,000

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
MARKETING ISSUES					
MARKETING COOPERATIVE					
• Encourage current marketing cooperative initiatives that are currently operating in the Wells, Barkerville & Bowron Lakes area.	Current markets Product specific	Existing Operators Chamber of Commerce	communication cooperation consistency competition	immediate	minimal
• Promote the benefits of marketing cooperatively		Operators & Chamber of Commerce	communication cooperation	immediate	minimal
• Develop cooperative marketing ideas and foster through work shops and education		All Operators	communication cooperation	immediate	minimal
• Bring together interested tourism operators of Wells, Barkerville & Bowron Lakes together to start establishing a format for a marketing cooperative		All operators	communication cooperation competition	immediate	minimal
• Develop a marketing cooperative strategy		All operators	communication cooperation	short term	minimal
• Develop the marketing cooperative constitution		Marketing Cop		short term	medium
• Work closely with the DMO's especially those currently in place		Marketing Cop		short term	minimal
BRAND & IMAGE					
• Bring major stake holders together to form a strategy group to develop a strategy and plan.	High Awareness	All operators Marketing Cop	communication cooperation	immediate	moderate
• Coordinate the community to develop a brand or image of the area	High awareness	Marketing Cop	cooperation	immediate	moderate
	MARKETS OR/&				

RECOMMENDATION	AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
BRAND & IMAGE cont					
• Develop an image and brand concept that represents the area and the main products of the area. It needs to be simple and portrays the assets of the area. Examples "Canada hey! But have you seen Canada Aha?" "Another world in your backyard" "Discover a new world next door"	Long haul Can / USA Regional Can / USA Close in local & BC	Operators Marketing Cop	consistency coordination cooperation	immediate	moderate
• Establish guide lines when using marketing & promotion tools and collectively brand the area using the existing resources of current marketing tools used by the operators of Wells, Barkerville & Bowron Lakes. Ie signage, brochures, print advertising, internet other marketing tools		Operators Marketing Cop	consistency	immediate	minimal
• Formulate a marketing strategy to get the awareness and branding image to target the market priorities.		Marekting	communication cooperation	immediate	minimal
• Develop a lure or discovery guide brochure that reflects the entire area and promoting the image of the area. To be distributed to regional USA and Canada.	Long haul Can / USA Regional Can / USA Close in local & BC		consistency competitive	Short term	high
PACKAGING & PROMOTION					
• Education on packaging of products through workshops		Gateway		immediate	minimal
• Develop packaged products to fit current markets and attract new markets		All operators		immediate short term	medium
• Develop a marketing & promotional plan for products considering current marketing tools in use and new avenues.		Operators Marketing Cop		Short term	

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
EVENT PROMOTION					
• Better coordination of events and event planning	Close in local	Chamber of Commerce All operators	communication cooperation	Immediate	minimal
• Develop a consistent format that will reduce the work load of event management and coordination	Close in local		consistency cooperation	Immediate	minimal
• Developing innovative ways to promote events such as: - Have all events listed in community event listings with the Quesnel, Williams Lake, 100 Mile House and Prince George Tourism Offices and other community event listings such as Recreation and Community Guides and papers. - Use other close in community events to help promote the event such as Billy Barker Days promoting the Fred Wells Days. - Better use of current advertising material.	Close in local	Community Groups organising events	coordination communication	immediate	minimal
• Using events to promote the area of Wells Barkerville and Bowron Lakes.	Close in Local and BC		coordination competition	short term	
• Develop new events for the area that promote the area. Potentially have the opportunity of holding events that are unique to the area. Such as the international gold panning championships and create greater exposure across all market segments and gain a direct and indirect injection of resources from such an event.	Long Haul O/S, Can /USA Regional Can / USA Close in local & BC	Interested parties Municipal Govt Chamber of Commerce	communication coordination	short to long term	very high
WINTER / SHOULDER SEASON					
• Primarily concentrate on the close in market especially the Cariboo area and their existing snowmobile markets	Close in local			immediate	medium

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
WINTER / SHOULDER SEASON cont					
• Design a trail map that takes in all snow mobile, cross country skiing and snow shoeing trails and winter activities the area has to offer.	All markets	All groups involved in trail systems		short term	medium
• Incorporate the winter season in the branding and image of the area, concentrating on the eco- tourism/ adventure product.		All Operators		Short term	medium
• Market the winter events effectively especially in the Cariboo region.	Close in	All Operators and			
• The shoulder season need to develop programs and events that are directed niche markets.		Operators involved		Short term	medium
• Packaging and promotion of the area to your existing markets and build up current markets.		All Operators			
AREA BEAUTIFICATION					
• Work in conjunction with the Community beautification plan.		Muncipal Govt & Community		Long term	very high
• Major project work refer to the area beautification plan giving priority to those that will have the most impact and commence working on those projects as community projects (similar to the Golden Foot Bridge project on a smaller scale)		Community			
• Look at the low cost projects and commence work on those.		Municipal Govt Community			
• Review other options that are outside the plan or can help improve the community - Beautification of the main street by planting flower boxes, etc - Clean up of yards and blocks encouraged by participating communities in bloom projects. - Community clean up programs - working with road companies and partners		Community Groups and operators			

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
AREA BEAUTIFICATION cont					
• Develop by laws and regulations that require new buildings to be period dated and have a theme of the Wells area include colour schemes		Municipal Govt & Community			
MARKETING TOOLS					
BROCHURE & FLYER DEVELOPMENT					
Branding of the area - To have all Wells Barkerville & Bowron Lakes tourist operators incorporate the area branding image strategy on the front of their brochures taking up 1/8th of the front cover in the top right hand corner. This has the potential to gain greater awareness of the area by incorporating the branding & image strategy	long haul Can /USA Regional Can / USA Close in local & BC Product specific high awareness	All Operators, Community Groups and Municipal Govt	cooperation communication consistency	immediate	minimal
• Marketing Cooperative - Work with local printing organisations to gain a % discount on printing for cooperative members.		Marketing Cop	cooperation communication	short term	minimal
• Tourist operators that have common interests develop a collective brochure to use. For example the artists of the area develop a cooperative brochure. Cheaper and produce more	Regional Can / USA Close in Local and BC Product specific medium awareness	Operators	cooperation communication competition	short term	minimal to moderate
PRINT ADVERTISING					
• Branding of the area - To have all operators incorporate the area's branding image incorporated in the ad with minimum add space in top right hand corner.	High Awareness	All Operators Marketing Cop	communication cooperation consistency	immediate / short term	moderate

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
PRINT ADVERTISING cont					
• Marketing Cooperative - Work collectively to purchase add space in specific publications. Thus gaining a cheaper rate and having a collective space creates a greater impact in the publication rather than having individual ads located throughout the publication.	High awareness	Marketing Coop	cooperation consistency competition	immediate	moderate
• Branding the area - by collectively coordinating publication space can better market the image of the area. This creates greater awareness using the branding & Strategy image	high awareness & product	Marketing Coop	communication		
• Packaging - There are a number of operators that advertise in vertical market publications such as snowmobile, camping or art publications. By packaging together a touring operator with an accommodation operator for example and by combining resources the ad publication will gain greater value and exposure.		Specific Operators Marketing Coop			
SIGNAGE					
• That operators receive education and training on signage marketing and basic sign design.		Gateway		immediate	minimal
• Have coordination from all operators with regards to signage in the area		All operators			
• The area develop standards for signage for the Gateway area such a font size, wording, size & maintenance.of signage		All Operators Municipal Govt			
• Wells to develop by laws on signage standards for the district.		Municipal Govt	consistency communication		
• Develop a signage maintenance program for the area.		Community	coordination consistency		
• Branding of the area - each sign needs to have a minimum of 1/8th of signage space for area branding image.		All Operators		short term	medium

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
SIGNAGE cont					
• Branding of the area - collective develop a road side signage campaign for the area over a period of years.	High awareness	Marketing Coop		Long term	high
• Branding of the area - Working with the North Cariboo Marketing Strategy signage program develop a long term signage strategy to brand the area throughout the regional marketing area, commencing at the turn off to Wells, Barkerville and Bowron Lakes.	Close in local & BC Regional Canada & USA awareness	Marketing Coop			
INTERNET DEVELOPMENT					
Workshop on developing and designing internet marketing of the tourism market.		All Operators		immediate	minimal
• With the large number of website users it would be valuable to develop a internet marketing strategy incorporating all the operators of the area.		All Operators		immediate	moderate
Marketing Cooperatively - Numerous operators are paying individually to have their own website linked to the PMO and DMO websites. A more efficient would be to better develop the well.bc website and have everyone linked and promoted better and contribute to have the one website linked to all the PMO, DMO, Accommodation, Touring and other suitable website links. Rather than each individual paying fees only one fee is paid by the marketing cooperative and the same value is gained.		All Operators Marketing Coop		immediate	high
• Develop the wellsbc.com website into a more tourism cooperative website with packaging products.	Awareness products	All Operators Marketing Coop		long term	very high
• Marketing Cooperative - Develop a cooperative database for information sharing and communication , central booking system, branding of the area, etc		Marketing Coop		long term	very high

RECOMMENDATION	MARKETS OR/& AWARENESS / PRODUCT	WHO	ISSUES	PRIORITY	COST
TRADE SHOWS					
• Branding of the area - Develop an area brand and image display and have it incorporated in each trade show and exhibition.	Market specific awareness product	Marketing Coop		immediate	moderate
• Marketing Cooperative - Coordinate collectively to have the area brand and image promoted at shows & exhibitions.	Market specific high	All operators Marketing Coop		short term	minimal
• Marketing Cooperative - Those operators who market at the same trade shows and exhibitions work together to have combined displays or booths located together to gain greater impact at the show or exhibition.	Market specific	High	cooperation communication competition consistency	short term	moderate
FAMILIARISATION TOURS					
• Work with the local Quesnel Tourist information centre and coordinate a tour where operators from all Cariboo region offices visit the area.	All markets awareness	DMO's Marketing Coop All Operators	cooperation communication competition	short term	medium
• Develop a mini tourism forum where all information can be shared as part of the tour.	awareness	All Operators Marketing Coop	cooperation communication consistency	immediate	medium
• Marketing Cooperative - Tour operators need to take greater advantage of the current familiarisation tours visiting the area and have greater involvement			communication consistency cooperation competition	immediate	minimal
• Marketing Cooperative - Collectively develop a virtual familiarisation tour and market it to all tour service providers, wholesalers, agents and sellers	awareness	DMO's All operators		log term	very high
• Marketing Cooperative - Develop a strong communication link with the major Cariboo Tourist Information Centres and ensure they receive up to date information what is happening in the Wells, Barkerville & Bowron Lakes area.	awareness / product	All Operators		short term	minimal

9 REFERENCES & RESOURCES

1. *North Cariboo Cooperative Marketing Strategy Report - 2000*

2. *Adventure Travel in Canada: An Overview of Product, Market and Business Potential* - Tourism Canada, Canada Directorate.,Feb 1995

3. *Eco-tourism - Nature/ Adventure/ Culture: Alberts and Bristish Columbia Market Demand Assessment* - HLA Consultants and the ARA Consulting Group Inc., Dec 1994

4. *Measuring our success II - 1999 -* Judy Campbell, Ecogistics Consulting Associates. 1999

5. *Cowichan Lake & The Carmanah Marketing Strategy 2001 to 2005* prepared by Taiji Vincent Communications in conjunction with the The Cowichan Lake Gateway Project Committee.

6. *The Value of Tourism* Tourism BC, Feb 2001

7. *B.C. Visitor Study - The report on visitors to Cariboo Tourism Region* prepared by Tourism British Columbia 1998

8. *Business Plan for Jack o'Clubs Casino project marketing strategy & business plan*

9. *Mr Pattrick Gedge, Senior Vice President of the Canadian Tourism Commission* Oct 2001

10. Quesnel Visitor & Conference Bureau

11. Cariboo Chilcotin Coast Tourism Association

12. *Sandy McElroy and the 6 Gateway Project Coordinators*

13. *Wells Barkerville & Bowron Lakes Operators*
    - *Alpine Snow Adventures - Wells*
    - *Amazing Space Studio - Wells*
    - *Barkerville & Bowron Lakes Provincial Park Contractors*
    - *Barkerville Heritage Park - Barkerville*
    - *Beckers Lodge - Bowron Lakes*
    - *Becks Pottery- Wells*
    - *Bowron Lake Lodge - Bowron Lakes*
    - *Bears Paw Café - Wells*
    - *Bear River Mercantile - Bowron Lake*
    - *Boychuk Contracting & 66 Mall - Wells*
    - *Boyetchk Electrical - Wells*
    - *Cornish Mountain Tours - Wells*
    - *Country Encounters - Wells*
    - *District of Wlells - Wells*
    - *Eldorado Gold panning & Gift Store - Barkerville*
    - *Goldfields Bakery - Wells*
    - *Gold Safari Tours & Treasure Hunters RV Park - Wells*

Hubs Motel - Wells
Island Mountain Arts - Wells
Kelly & King Bed & Breakfast - Barkerville
Kwong Sang Wing Store - Barkerville
Legion - Wells
Long Duck Tong Restaurant - Wells
Marie Nagel Gallery - Wells
Mrs Neates Sewing Room - Barkerville
Northwoods Restaurant - Wells
Pete & Diggers General Store - Wells
Quesnel Tourism Information Centre - Quesnel
St George Hotel - Barkerville
Theatre Royal - Barkerville
Troy Wood Shop & Wells Community Forest - Wells
Valleyview Bed & Breakfast- Wells
W&J's Getaway- Wells
Wake Up Jakes - Wells
Wells Hotel - Wells
Wells Service Station - Wells
White Caps Motel & RV park - Wells
White Gold Adventures - Wells

NOTE; These are the operators that were surveyed over the summer of 2001 and there are numerous other operators who operate in the area and feed back and participation is most welcome.

10 APPENDICES

- **APPENDICES**

Marketing Survey Results - Tourism & Service Operators ….. Page a
Marketing Survey Results - Accommodations……. Page l
Marketing Survey Results - Restaurants & food establishments. Page s
Marketing Survey Results - Other Business Operators…… Page w
Marketing Survey Questionnaire

Notes referring to marketing survey results

TOURISM SERVICE OPERATORS

- Strouss Dry Goods, McPhearson's Watchmakers, Wake up Jakes & Daly General Store are all of Barkerville are operated by the Rummel Family see Wake up Jakes in restaurants & food establishments.
- Beckers Lodge & Bowron Lake Lodge have canoe tour guide and rental see accommodations.

RESTAURANTS & FOOD ESTABLISHMENTS

- Wells Hotel has a restaurant and pub please see accommodations.
- Beckers Lodge & Bowron Lake Lodge have restaurant and eating establishment see accommodations.
- Bear River Mercantile has a restaurant see tourist & service providers.
- Kelly & King Bed & breakfast, Valley View Bed & Breakfast, and the St George Hotel provide breakfast for guests see accommodations

Note

Interviewed a number of other associations & organisations affiliated with the tourism market in Wells, Barkerville & Bowron Lakes. They are:

- Quesnel Tourism & Conference Bureau
- Quesnel Economic Development Association
- District of Wells
- North Cariboo Tourism Marketing Cooperative.