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COMOX VALLEY TOURISM STRATEGY

prepared for:

Ministry of Tourism, Recreation and Culture  
and  
Comox Valley Chamber of Commerce

prepared by:

The Economic Planning Group of Canada

in association with:

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November, 1986

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G. David Hall  
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## 1.0 INTRODUCTION

### 1.1 Background

In the Summer, 1986, The ECONOMIC PLANNING GROUP (EPG) was contracted to produce a tourism development strategy for the Comox Valley on Vancouver Island. The project was designed as a pilot project or case study to aid in the preparation of a community oriented, "how-to" manual for tourism development at the local level.

The project was financed through the federal/provincial Subsidiary Agreement on Tourism and was managed by the Ministry of Tourism. Administration and liaison at the local level was provided by the Comox Valley Chamber of Commerce.

The project has produced two separate products although both were developed simultaneously. The first product is the subject of this report and is the Tourism Development Strategy for the Comox Valley. The Comox Valley Strategy was in turn designed as the case study to develop the second product - the Community Tourism Development Manual.

Although many communities could have been utilized, the Comox Valley was selected as an ideal region for the pilot study for a number of reasons. First, the Valley had demonstrated recent success in mounting regional/community promotional campaigns through Ski Comox Valley and Tourism Comox Valley. Second, the area has a mix of special interest groups and human resources, and an active Chamber of Commerce. Third, the area possesses a broad range of physical resources including diverse scenery; a city, town and village plus rural areas and two islands; salt and freshwater fishing; boating; skiing; and a good accommodation and food service base. Furthermore, the valley can be accessed by road, rail, air and water.

From a market perspective, the area is also representative in catering to special interest markets such as fishermen and skiers, while also having a more general family vacation appeal. The area also did not have an overall tourism goal or a plan detailing how to best develop and manage the resources, and tap the markets. Consequently, the Comox Valley became the logical area to test a variety of strategy formulation techniques that could have application, in whole or in part, in other areas of the province.

### 1.2 Objectives

The overall purpose of the project is to produce a tourism development manual while utilizing a test case area to design the techniques. The specific objectives as outlined in the proposal call of April 11, 1986, are to:

develop a generic tourism development manual providing a standardized "how-to" approach to tourism development



- utilize the Comox Valley as the model project to develop the manual.

Specific requirements of the generic manual include a series of issues, as follows:

organizing communities and sub-regions for the process;  
 establishing goals and guidelines-of the project;  
 inventory and analysis of existing plant and potential resources;  
 market analysis;  
 marketing plan;  
 developing strategy objectives;  
 budgets and implementation;  
 maintaining tourism activities;  
 development approach;  
 hiring and working with consultants.

The specific objectives for the Comox Valley are to use the model process to develop a tourism strategy for the Comox Valley. It should:

- use the model as the vehicle to develop the strategy
- test the various procedures in the model
- refine the process as necessary
- be supported by the community
- be implementable.

### 1.3 Scope

The complete task involves two inter-related but separate projects, running parallel courses, but being developed for different audiences. As far as Ministry of Tourism is concerned, the priority project is the "how to" manual that can be used for other communities to guide preparation of their tourism development plans. For representatives of the Comox Valley, the priority project is preparation of their tourism development strategy. The remainder of this report is devoted to the Comox Valley Tourism Development Strategy.

The study area for the project is defined as the Comox Valley, which contains an area of 1770 square kilometres (684 square miles). The specific geographical boundaries are from the Oyster River in the north to Fanny Bay in the south, a distance of about 80km (50 miles). The western boundary extends inland from the coast approximately 50km (30 miles) and includes Comox Lake and the Mt. Washington/Forbidden Plateau ski areas. The eastern boundary is the Vancouver Island coast, but including Denman and Hornby Islands. In terms of communities, it contains the City of Courtenay, Town of Comox, and Village of Cumberland, plus the unincorporated communities of Royston, Union Bay, Merville and Black Creek.

Our approach was to produce a level of detail commensurate with the objectives of the task and the budget. Since planning projects can produce differing expectations for different agencies in the process, we have been as explicit as possible in outlining our work program.

In terms of scale, the project was to produce a strategy that was based on defensible analysis and one that was implementable. This means producing a systematic analysis of tourism resources and markets and an "actionable" means to implement the results. The level of detail required needs to be sufficient to produce this result.

A tourism strategy means different things to different people, depending on expectations and the particular reason for interest. Our approach has been to produce a guidebook allowing the reader to follow a logical analysis and sequence of events. We have attempted to address general issues within the valley as well as specific issues of concern to individual communities and rural areas.

In other words, the report attempts to describe the overall regional strategy while including specific issues to be addressed at the community level. As with all strategies, they are designed to point-the-way, and are not the end product, but more realistically, a place to start by generating increased tourism through an organized, integrated approach.

The strategy has been written for a mixture of audiences who may require the information for different reasons. Not in any order of importance, four separate groups can be identified. One group is the residents of the Comox Valley who can perhaps better understand the area's potential and how the tourist industry can be used to meet community objectives.

A second audience is the tourism industry itself, whose Operators can review a ranking of resources and markets and hopefully use the analysis to generate increased business. A third group are local and regional government who will have more information to evaluate, when establishing development priorities or when trying to accommodate tourism in their own future development plans. The fourth audience we identified are the investors or entrepreneurs who may be able to see an untapped resource or a potential market and develop and/or expand a product or service.

The timeframe to produce the Comox Valley Tourism Strategy was four months (including the community tourism development manual). The development timeframe for the strategy is for up to ten years, covering short term (1-2 years), mid term (3-5 years) and long term (6-10 years).

#### 1.4 Methodology

The basic method of preparing this tourism strategy has simply been to assess the resources, analyse the markets and match the two. To translate this information into an action plan, community goals/aspirations/attitudes and the effects of competition are factored into the analysis.

The first step involves a description of tourism as a component of the economy. This section includes a description of tourism's position in the local economy and the area's socio-economic profile, plus a discussion of the costs and benefits of tourism.

The next step is to assess the area's tourism resources and attractions. This includes natural resources, tourism facilities and tourism infrastructure. Other resources included are human resources, hospitality services and tourist activities.

Concurrent with the resource assessment, tourism markets are assessed. This includes geographic market areas and market segments, plus length of stay, party size/composition, trip purpose, and activity preferences.

The final component of describing the existing situation involves an analysis of current industry performance - including hotel/motel occupancy rates, attraction patronage, and event usage. The existing tourism organizational structure is reviewed as is the current marketing program.

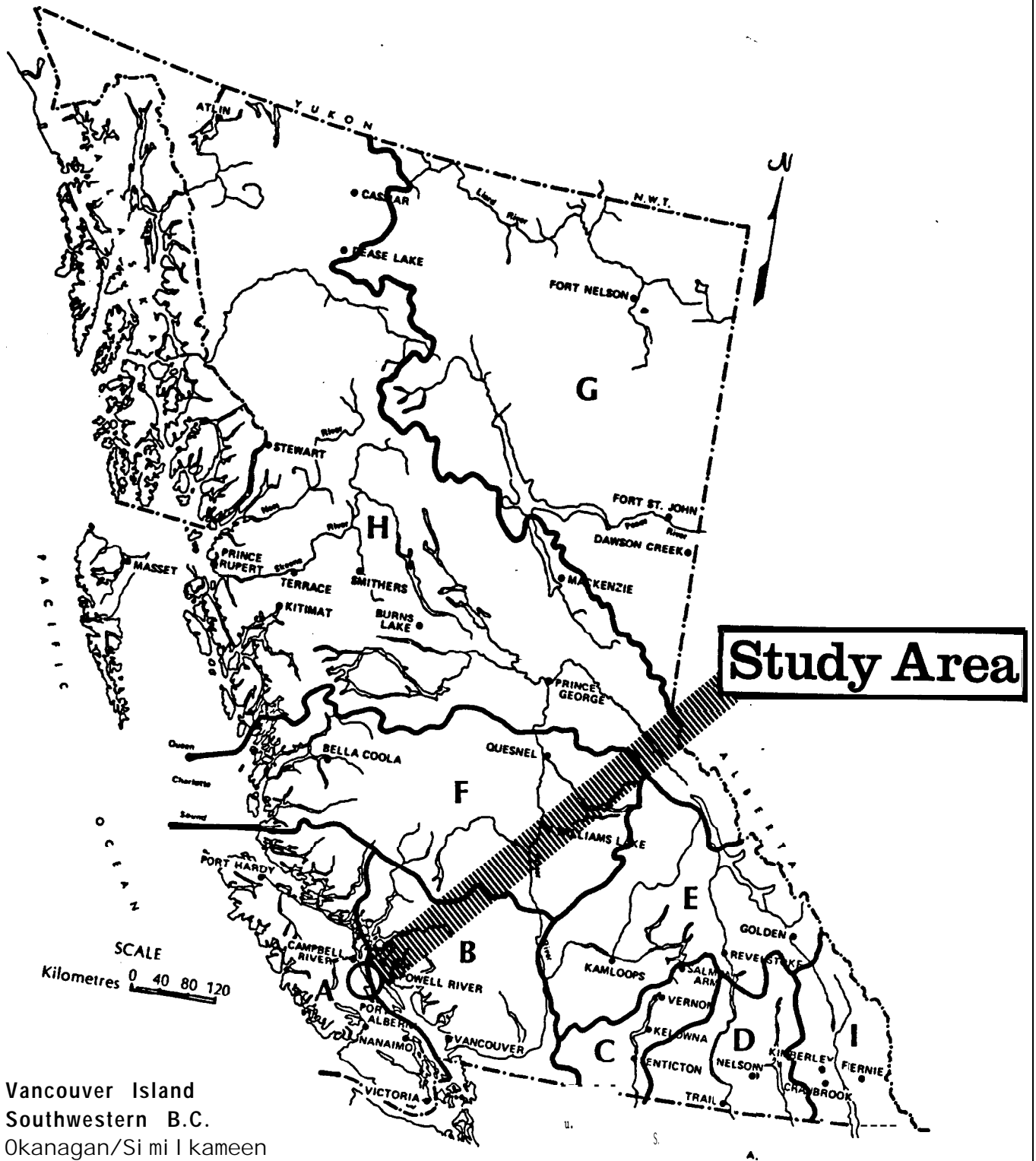
The existing tourism development environment involves an assessment of the area's strengths and weaknesses itemized for Courtenay, Comox, Cumberland, Denman/Hornby and the rural areas. Community goals for tourism and attitudes towards tourism are also evaluated. Tourism trends are analysed as they impact lifestyles, population shifts, marketing and development changes. A final report of the current situation is the competitive environment of tourism areas to the north and south.

The results of the above sections are summarized in a ranking of resources/activities/markets. This numerical ranking scale is designed to indicate the areas of potential. These are further explored through the analysis of opportunities under the headings of development, market and service.

The opportunities (and constraints) are then incorporated into the tourism strategy, including objectives, product development, market development and infrastructure development. The final aspect of the plan is the implementation phase, documenting priorities, timeframes, organization structures, costs and a marketing plan. A process to monitor success is also included.

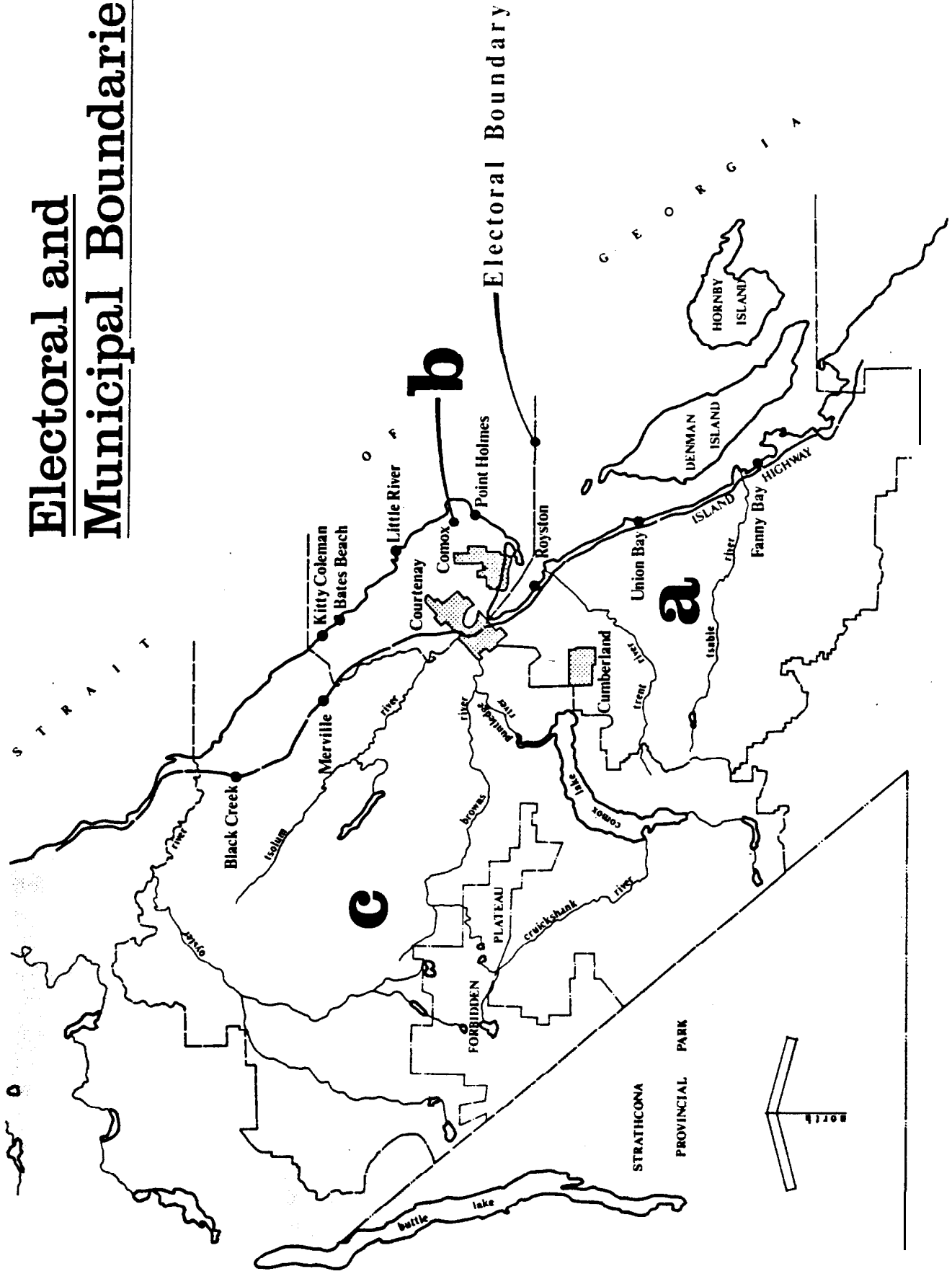
The procedures to actually undertake the research have involved a combination of original research and reviews of secondary sources. These research techniques were undertaken within a pre-arranged model, within which experiments were conducted to revise and improve the analysis format. The secondary research sources included reports, surveys, briefs, studies and maps that were accessed during the project. Original research included surveys of tourism operators, interviews with tourism/community/government representatives, a public questionnaire, site reconnaissance, visitors survey, survey of Vancouver residents plus a tourism workshop and public forum.

# PROVINCIAL TOURISM REGIONS



- A. Vancouver Island
- B. Southwestern B.C.
- C. Okanagan/Si mi I kameen
- D. Kootenay Boundary
- E. Thompson/Shuswap
- F. Cariboo/Chilcotin
- G. Yellowhead 16
- H. Peace River/Alaska Highway
- I. B.C. Rocky Mountains

# Electoral and Municipal Boundaries



Comox Valley Tourism Strategy

FIGURE 1

## 2.0 THE BUSINESS OF TOURISM

### 2.1 Description of the Comox Valley

Tourism is a dynamic, people oriented industry that derives its strength and success from the resources of the host communities and surrounding areas. These features include a variety of natural, built/organized and human resources and activities, which will be expanded in Section 3.0. However, the geographic setting, history and socio-economic profile all set the stage for the development and expansion of the tourist industry.

#### 2.1.1 Setting

The Comox Valley encompasses 1770sq.km. (684sq.mi.) stretching between Fanny Bay in the south to the Oyster River in the north. It includes the three incorporated communities of Courtenay, Comox and Cumberland; the unincorporated communities of Fanny Bay, Union Bay, Royston, Black Creek and Merville; the surrounding rural land; and the islands of Denman and Hornby.

The actual valley referred to as the Comox Valley is the low lying broad band of gently rolling land, from the coast on the east and stretching inland. from 5 to 10km (3-6 miles). The valley is bordered on the west by the Vancouver Island Mountain Ranges which contains the Comox Glacier.

In terms of land use designations, most of the area outside of the incorporated municipalities is classified as rural-resource.\* Most of the coastline from Fanny Bay to Union Bay is zoned rural residential with a parcel of industrial property at Buckley Bay. The foreshore at Union Bay (Union Point) is zoned industrial while rural-residential predominates to Royston. Royston is higher density residential with a small commercial area and larger industrial zone. From Comox and around the coast to the north, rural residential predominates.

Agricultural land under cultivation and forest land are the predominant vegetation covers. About 75% of the valley floor is in the Agricultural Land Reserve, with land ownership in many small to medium sized parcels.

The study area contains all or part of four main drainage systems, including the Oyster River, Courtenay River (including the Browns, Puntledge, Cruickshank and Tsolum Rivers), Trent River and Tsable River systems.

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Regional District of Comox-Strathcona, The Comox Valley Official Settlement Plan, 1981.

### 2.1.2 Climate

The area's climate is classed as Marine West Coast and Southern Interior Continental, characterized by mild-to-cool winters and warm-to-hot, dry summers. By comparison, the Comox Valley is on average slightly colder in winter, slightly warmer in summer, wetter (snow and rain) and slightly less sunny than Victoria.

Weather records for the Comox Airport report a mean monthly minimum temperature of 5.2°C and a maximum of 13.5°C. Mean rainfall is 110.1cm and mean snowfall 106cm. The average frost free period is 180 days. Hours of bright sunshine records are not available, but the expected average is between 1800-1850, similar to Nanaimo and slightly less than Victoria's total of 1985 hours.

The Comox Valley study area contains three bioclimatic zones, including the Coastal Douglas Fir, Coastal western Hemlock and Mountain Hemlock zones. Within these three zones are seven biogeoclimatic variants including from lowest to highest elevation:\*

- Drier Maritime Coastal Douglas Fir
- Wetter Maritime Coastal Douglas Fir
- Maritime Coastal Western Hemlock (Montane)
- Maritime Coastal Western Hemlock (Drier)
- Maritime Coastal Western Hemlock (Submontane)
- Mountain Hemlock
- Alpine Tundra

These areas range in elevation from sea level to nearly 2000m (Alexandra Peak). In spite of these dramatic topographic changes, approximately one-half the study area lies below 150m. This constitutes what is known as the Comox Valley, the coastal strip varying between 5 and 10km wide.

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\* Ministry of Forests, Biogeoclimatic Units, Map Sheet 92SW.



### 2.1.3 Jurisdictions

Jurisdictionally, the study area (outside of the three incorporated municipalities) is administered by the Regional District of Comox-Strathcona. The regional district (actually the first one established in the province in 1965) is responsible for governing the area.

The following regional goals describe the principles upon which the Official Settlement Plan is developed:

- i) Provision of a means to achieve orderly and efficient development;
- ii) Retain "rural character" of area through development which protects and conserves the natural environment;
- iii) Develop policies in support of promoting the long term viability of agriculture, and the economy of the community;
- iv) Preservation of environmentally significant or unique areas;
- v) To achieve the wise use of renewable and non-renewable resources;
- vi) Provision of a range of choices to allow for varied life styles.

The three incorporated areas of the City of Courtenay, Town of Comox and Village of Cumberland also have by-laws enacting their official community plans. The goals of these municipalities are generally related to preserving environmental quality; efficient land use for residential, commercial and industrial; diversifying employment; creating business opportunities; and providing recreation.

The Islands Trust is responsible for land use planning, preparation of community plans and the enacting of zoning and subdivision bylaws on Denman and Hornby Islands. Their mandate is to preserve and protect the unique amenities and environment of the Trust Area for the benefit of the people of the islands and the province generally.

## 2.2 Socio-Economic Profile of the Comox Valley

### 2.2.1 Population\*

Population of the Comox Valley (1985) was nearly 40,000, distributed as follows:

Courtenay	10,021
Comox	6,869
Cumberland	2,131
Electoral Areas	<u>20,368</u>
	<u>39,386</u>

The rate of growth has been steady, averaging 4.1% per year, growing from 24,300 in 1971 to 39,300 in 1985.

#### HISTORIC STUDY AREA POPULATION

(1971 - 1985)

	<u>1971</u>	<u>1976</u>	<u>1981</u>	<u>1985</u>
Courtenay	7,155	7,733	8,992	10,021
Comox	3,980	5,359	6,607	6,869
Cumberland	1,718	1,896	1,947	2,131
Electoral Areas				
A. Baynes Sound, Islands	3,324	3,930	4,995	
B. Comox North, Black Creek	4,947	5,920	6,929	20,365
C. Puntledge	<u>3,242</u>	<u>4,552</u>	<u>5,748</u>	<u>        </u>
	<u>24,366</u>	<u>29,390</u>	<u>35,218</u>	<u>39,386</u>

\* Employment and Immigration Canada, Area Profile - Courtenay Canada  
Employment Centre, September 1985.

Population growth in the Comox Valley is expected to rebound somewhat from the recent recessionary period, although growth is not expected to return to pre-recessionary levels due to generally slower growth which is expected for the province as a whole during the late 1980's. However, as has been the case historically this region is expected to perform somewhat better than the provincial average. Based on a projected annual growth rate of 2.4% from 1984 to 1989, population in the Comox Valley is expected to increase from 36,500 in 1984 to 41,000 in 1989.\* With 1985 population levels at 39,386 it is evident that the Valley is already exceeding this growth rate and population could well exceed 41,000 by the end of this decade.

Population by age group (1981 Census) shows a close match to the provincial average, with proportions greater than the provincial average for the 0-4, 5-9 and 45-54 age group. The averages were lower for the 25-34 and 65+ age group.

Population By Age Group

<u>Age Group</u>	<u>B.C.</u>	<u>Comox Valley</u>
0 - 4	7.0%	7.2%
5 - 14	14.2	15.5
15 - 24	17.4	17.5
25 - 34	17.8	16.6
35 - 44	13.0	13.1
45 - 54	10.1	10.9
55 - 64	9.4	9.6
65+	<u>11.1</u>	<u>9.6</u>
	100.0%	100.0%

Ethnic origin of the population is predominantly British, followed in distant place by German, French and Scandinavian origins.

British	63.3%
French	4.3
German	5.8
Scandinavian	3.1
Ukranian	1.8
Chinese	0.5
Native	1.4
Other	<u>19.8</u>
	100.0%

---

\* Ibid

### 2.2.2 General Economy

The local economy is reasonably well diversified in comparison with surrounding areas. The dominant factor is the Canadian Forces air base at Comox with its large military and civilian staff. The forest industries are an important component as well; logging is the main activity within the area, but a significant number of residents are employed at the pulp and paper complex at Elk Falls in the Campbell River area. There is a well developed agricultural industry producing for the local market and for shipment to other parts of the Island and by direct ferry to Powell River. Commercial fishing, tourism and the retirement industry comprise the remainder of the economy with the public service sector (i.e. government, education, health care) being an important employer as well.

The total labour force (employed and unemployed civilian, non-institutional population over 15 years of age) was 16,565\* in 1981. The distribution was 13% primary, 17% secondary and 70% tertiary. This is considerably higher than the provincial average for primary (7%), slightly lower for secondary (18%) and lower for the tertiary sector (75%).

The largest employers in the area tend to be public services of one kind or another. The next largest are the manufacturing (sawmill) and service business. The largest in order of employee size are (September 1985):

CFB Comox	1,471
School District #71	535
St. Josephs Hospital	345
Ministry of Transportation & Highways	117
Zellers	112
E.W. Bickle	100
RCMP	86

---

\* 1981 Census

## 2.3 Tourism in the Regional Economy

### 2.3.1 Evolution of Tourism

Before proceeding further it is essential that all players developing and implementing the tourism strategy be dealing with a consistent definition of tourism or tourist. For the purposes of this analysis a tourist is a traveller visiting the Comox Valley for non-business purposes, who resides outside the Valley. By intentional omission, the definition does not specify purpose of trip such that persons traveling for conventions, and visiting friends are all considered tourists. The definition includes people who reside short and long distances from the Comox Valley. It also includes any length of stay in the valley from same-day, pass-through traffic to those staying overnight or for several weeks.

In other words, tourism, for the purposes of our analysis includes people traveling:

- on overnight vacations
- on day trips
- to visit friends and/or relatives
- to shop
- to attend a sports, cultural or entertainment event
- to attend conventions.

To better plan for the development of tourism, it is useful to understand the current status and the past evolution of the tourism industry. The current status is reported in SECTION 5.0, while the following is a brief description of tourism's evolution.

The Comox Valley, like most areas of B.C., developed its tourism industry based on its natural resources and the family vacation market. Tourism started to develop in the post World War 11 period and throughout the 1950's with beach oriented activities, sports fishing, and skiing at Forbidden Plateau. During this period, the cottages along Kye Bay were developed, Bates Beach Resort started, and several of the accommodation properties such as the Travelodge and River Heights Motel. The season was characterized by fairly intense school-holiday summer vacations and predominantly local use of the ski area.

Throughout the 1960's the industry grew with the development of additional motels such as the Sleepy Hollow and Anco Motels. New restaurants were opened. Island Highway improvements made access easier from the south as did the start of the B.C. Ferries service to Nanaimo.

Steady growth in the industry continued throughout the early and mid 1970's spurred by the generally buoyant provincial economy. A major building boom occurred in the late 1970's with the development of Mt. Washington Ski Area and construction of the Washington Inn, Westerly Hotel and the Collingwood Inn. In the space of two years the capacity of the tourist industry virtually doubled.

This rapid growth period was followed (starting in late 1981) with the recession which, although improving, continues as of late 1986. This period was characterized by a decline in tourism activity, business receiverships, and closures/ownership changes of many valley tourism properties.

In spite of these recent problems, the overall significance of the industry continues to grow in absolute terms and especially relative to other sectors of the economy. Although the lack of statistics make accurate comparisons difficult, as does the amount of part-time employment, tourism is likely the largest employer in the valley next to defence (CFB Comox). In terms of income it is probably in third place after manufacturing and forestry, and ahead of agriculture, mining and fishing.\*

### 2.3.2 Impacts of Tourism

Like all sectors of the economy, tourism creates a series of impacts on host communities, which are both positive and negative. The most commonly held positive impacts are employment creation and income generation. Frequently cited negative impacts are congestion in popular spots and the creation of part-time, low-skilled jobs.

To aid local government agencies in positioning tourism against other aspects of economic development, we have prepared a listing of some issues and concerns.

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\* Ministry of Economic Development, Central Statistics Bureau, personal communication.

IMPACTS OF TOURISM

<u>ISSUE</u>	<u>POSITIVE</u>	<u>NEGATIVE</u>
<u>ECONOMIC</u>	<ul style="list-style-type: none"> <li>- Earns foreign exchange</li> <li>- Creates employment</li> <li>- Circulates income within the economy</li> <li>- Very labour intensive</li> <li>- Generates local, provincial and federal taxes</li> <li>- Provides employment for those categories of workers traditionally difficult to employ i.e. young people, women, unskilled etc.</li> <li>- Increases land values</li> <li>- Aids in diversifying the economy.</li> </ul>	<ul style="list-style-type: none"> <li>- Can use resources that could generate revenue for extractive purposes (forestry, mining)</li> <li>- Can require a public investment in infrastructure (i.e. roads, sewer, water, utilities)</li> <li>- Creates a relatively large proportion of low-paid, semi-skilled jobs.</li> <li>- Can increase municipal service costs for policing, fire protection and health care.</li> </ul>
<u>SOCIAL</u>	<ul style="list-style-type: none"> <li>- Based on raw materials (resources) that exist</li> <li>- Creates improved or new facilities for local residents, i.e. beaches, restaurants, lounges, theatres, recreation areas etc.</li> <li>- Provides an expanded outlet for crafts, arts, and culture</li> <li>- Assists in educating visitors about different cultures and traditions</li> <li>- Can improve the image of the community.</li> </ul>	<ul style="list-style-type: none"> <li>- Can create congestion in popular local recreation areas</li> <li>- Can deplete natural resources i.e. wildlife, fish etc.</li> <li>- Can create an unfavorable image</li> <li>- Can create a negative perception about service industry jobs vs. production or manufacturing jobs.</li> </ul>
<u>OPERATIONAL</u>	<ul style="list-style-type: none"> <li>- Relative ease of entry for owner-operators regarding training, credentials etc.</li> <li>- Can produce an enjoyable lifestyle</li> <li>- Can allow an off-season for other pursuits.</li> </ul>	<ul style="list-style-type: none"> <li>- Very dependent on climate and weather</li> <li>- Influenced by exchange rates</li> <li>- Generally cyclical in nature, following the economy</li> <li>- Very difficult to predict future tourism activity with accuracy</li> <li>- Very susceptible to competition both locally and farther afield</li> <li>- Success very dependent on capability of facility management and effectiveness of promotion</li> <li>- Very labour intensive, involving hiring, firing, labour stoppages, labour shortages and other human relations issues</li> <li>- Generally costly to finance</li> <li>- Requirement to build markets, normally requiring 3-5 years.</li> </ul>

## 2.4 Conclusions

- The Comox Valley has a scenic and attractive setting, varied topography, a long ocean shoreline, nearby islands, a pastoral setting, plus interesting and varied population centres. The climate is generally very favorable by B.C. standards and exceedingly favorable by Canadian comparisons.
- Different sections of the area are under various jurisdictions including the City of Courtenay, Town of Comox, Village of Cumberland, the Regional District of Comox-Strathcona, and the Islands Trust for Denman and Hornby Islands.
- A fundamental goal of rural jurisdictions is to preserve and protect the rural character and natural environment, while promoting a viable economy and varied lifestyles. Goals of the three municipal agencies have a similar emphasis on environmental quality and recreation opportunities with a somewhat stronger emphasis on commercial development, employment and business opportunities.
- The area's history provides some interesting tourism oriented development themes with coal mining in Cumberland; shipping and marine activities in Comox, Courtenay and Union Bay; agriculture in Merville and Black Creek and the military at Comox.
- The Comox Valley population is approximately 40,000 people with growth rates slowing from 4% prior to the recession to projected current rates of 2.5%. Population distribution by age group generally follows the provincial average with somewhat more people under 24 and fewer over 65 years of age.
- The Comox Valley economy is reasonably well diversified with a higher proportion of primary industry than the provincial average and a smaller service sector.
- The valley's tourism industry grew steadily through the 1950's to the late 1970's based on outdoor recreation resources. A building boom in the late 1970's preceded the recession with most businesses experiencing severe financial hardship, resulting in numerous receiverships and ownership changes. It continues to grow, however, in absolute terms and especially proportionally to other industry sectors.
- Tourism impacts can be negative, especially if the industry is not well managed relative to the objectives of area residents. However, a variety of positive economic and social benefits have been derived by Comox Valley residents from the industry and its growth over the past several decades.
- A tourist for the purpose of this study is defined as a person visiting the Comox Valley for non-business purposes, who lives outside the valley.



### 3.0 THE ATTRACTIONS

The supply side of the tourism supply/demand system is comprised of the resources that entice a visitor to the area and provide the facilities to house, feed, entertain and supply recreation opportunities. In this section we have documented the natural resources and tourist activities; the commercial accommodations; food services; attractions; events; and cultural and entertainment outlets; recreational facilities; and tourism infrastructure.

Categorizing these "resources" inevitably requires some arbitrary decisions as to whether the particular resource is an attraction, a facility, a service or an activity. Due to the wide mix of resources that make up the travel industry, this is perhaps unavoidable. However, for our purposes we have attempted to categorize these elements into logical, definable groups.

For example, scenery and ski areas are physical resources which create sightseeing and skiing opportunities. The same can be said of the marine resources and wildlife resources to which fishing/boating and hunting activities apply. Consequently, we have grouped these resources and activities together.

#### 3.1 Natural Resources/Tourism Activities

##### 3.1.1 Sightseeing/Viewing

Sightseeing is an activity rated highly by visitors to the area (one-quarter of visitors overnighting in the area ranked sightseeing as their most important activity - Visitors 79). Although trying to rank viewsapes and areas of scenic appeal is hazardous because of the subjectivity, we have attempted a listing based on views from highways. From south to north some of the most appealing scenic views are:\*

Hornby/Denman ocean/mountain views  
 Hornby/Denman pastoral scenes  
 Views across Baynes Sound from Fanny Bay,  
   Buckley Bay and Union Bay  
 Comox Harbour views from Royston  
 Courtenay River Estuary from Comox Road  
 Pastoral and mountain views from Back Road,  
   Ryan Road and Anderton Road  
 Merville/Blackcreek pastoral views.

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\* Comox Valley Official Settlement Plan, Map F, Scenic and Sensitive Areas. (Feb. 1980)

Urban sightseeing opportunities occur in the downtown areas of Courtenay, Comox and Cumberland with a mixture of pleasant streetscapes and interesting architecture.

The importance of sightseeing as a motivator for travel and as an activity, is significant. As mentioned above, 25% of visitors to the Comox Valley rate sightseeing as their most important activity, while 50% of Vancouver Island visitors rate sightseeing as their most important activity. (Visitors '79)

In terms of origins, the proportion of visitors ranking sightseeing as their most important activity is as follows:

Alberta	19%
Other Canada	34%
Washington	67%
California	58%
Other USA	69%
International	36%

Generally, the scenic appeal of the area ranks very high, as pleasant and attractive scenery abounds. However, with the exception of the Comox Glacier, the quality of views and visual scenes can be duplicated in many areas of Vancouver Island and British Columbia. In fact, the area lacks the more dramatic and awe-inspiring views of the Rocky Mountains, the Fraser Canyon, or the north coast. The area is unique, however, in the variety and diversity of scenery from attractive or historic urban scenes to the marine, mountain and pastoral views.

### 3.1.2 Skiing

Downhill skiing is the single most popular form of commercial recreation in the Comox Valley. The combined downhill skier-day visits (in a normal snow year) for Mt. Washington and Forbidden Plateau are about 280,000 per year (November to April) making the area second only to Whistler/Blackcomb in terms of skier visits in B.C.. Market distribution is approximately as follows:

Comox Valley	14%
North Island	15
Mid Island	29
Victoria	31
Off-Island	10
	<hr/> 100%

Market areas showing growth over the past three years have been Victoria and Port Alberni, while off-island markets have declined slightly.

Skiing has had a major impact on the nature of the visitor industry in the Comox Valley with the opening of Mt... Washington in 1979-80. It has been directly responsible for the related development of local ski shops and in generating a large volume of hotel/motel room-nights and restaurant sales, particularly on weekends. The subsequent refurbishing of Forbidden Plateau is expected to add to this winter economic impact. Cross-country skiing attracts a much smaller, but steady clientele of about 16,000 skiers.

Due to the lack of on-mountain accommodation at Forbidden Plateau, and the small number of units at Mt. Washington, the economic impact of skiing is significant in the valley hotels/motels and restaurants. Unfortunately from a demand perspective, most skiers would prefer to stay on-mountain.

### 3.1.3 Saltwater Fishing

Next to skiing, fishing is the largest recreationally oriented attraction to the study area. In terms of salmon caught, the zone containing the study area yielded 259,000 salmon (215,000 coho and 44,000 chinook) in 1985, compared to 310,000 (259,000 coho and 51,000 chinook) in the area containing Campbell River.

Fishing effort statistics, a measure of the number of fish per boat trip are virtually identical to those in the Campbell River area. Catch in the Comox Valley area of .41 chinook and 2.0 coho, compared to Campbell River figures of .42 chinook and 2.1 coho, indicate the success of sports fishing in the area.

By comparison to Campbell River and the Parksville-Qualicum area, boat rentals are relatively scarce with only six rental outlets, all located off the main road.

Fishery improvement projects currently underway are expected to have a major impact on bolstering fishery resources. The Putledge River hatchery returned about 50,000 coho while transplants to the Oyster River are expected to see upwards of 15,000 pink salmon and 500-1,000 coho and chinook. Projects on the Trent River, Little River, Mallard Creek, and about six other creeks are reviving a resource that had been declining due to natural and man-made causes.

### 3.1.4 Boating/Sailing

Power boat cruising and sailing are popular activities in the Georgia Strait. The most popular boating areas in the marine part of the study area are Comox Harbour, Baynes Sound, Lambert Channel, Tribune Bay, Henry Bay and Sandy Island. The area, particularly Comox Harbour, is a popular staging area for boating trips to Desolation Sound.

Tribune Bay Park and Sandy Island Marine Park cater to about 1,100 and 800 boating parties annually,\* with virtually all **activity in the summer.** (These figures are based on-spot counts and are considered to be conservative.)

Cruising and sailing in the area are pursued by both **resi-**dents and visitors. No reliable statistics are available on visits to the area by pleasure boaters, but the volumes **are** expected to be significant. **Due to the limited transient facilities,** the **length** of stay in the area (or the waters adjacent to the **Comox Valley**) is expected to be short.

The existing charter operations are virtually fully booked for the peak late June to early September with utilization in the 30% to 50% range in the spring and fall. Between 350 and 400 charter weeks are typically booked out of the study area. Virtually all are sailboat charters although there appears to be a demand for power boat rentals/charters.

### 3.1.5 Hunting

Wildlife resources in the area, having a hunter market, include deer, black bear, waterfowl and upland game birds. The applicable Management Unit (MU1-6) is slightly larger than the Comox Valley study area, extending from Campbell River to Qualicum. Access is generally good to and through the area via old logging roads while private land issues are a deterrent to increased hunting activity.

The average deer harvest is between 800-1,400 animals annually. Virtually all deer hunting in the area is by B.C. residents with most of them local residents. The typical hunting effort per deer is just over 20 days (higher than the regional average of 14 days) with a success ratio of about 38%. Populations and hunter pressure have been relatively stable throughout the 1980's.

A few to a few dozen black bear are taken each year by about 100 hunters. Success ratios are about 40% taking about 14 days effort per bear harvest.

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\* Ministry of Lands, Parks and Housing, Park Data Handbook, 1985.

The average harvest and hunter volumes for waterfowl and upland game birds throughout the 1980's are as follows:

Duck	337 hunters	2,962 birds taken
Goose	106 hunters	66 birds taken
Blue Grouse	563 hunters	3,785 birds taken
Ruffed Grouse	552 hunters	1,828 birds taken
Pheasant	57 hunters	37 birds taken

### 3.1.6 Freshwater Fishing

The fresh water fishery in the Comox Valley, including both rivers and lakes, has a variety of sports fish species. The major river systems of the Trent, Tsable, Courtenay (and Brown and Puntledge), Oyster and Little River maintain rainbow and cutthroat trout, steelhead and dolly vardon. Lakes include the low elevation examples of Comox, Maple, Langley, Tsable and Wolf Lakes, and the high elevation lakes such as Battleship, Helen MacKenzie and Moat Lake. These produce mainly a rainbow and cutthroat trout fishery.

The fishery is predominantly (98%) a B.C. resident market, with nearly 5,000 resident sports fishing licences sold in the area and less than 100 each for non-resident Canadians and United States residents. Of the B.C. resident fishermen, 80% are estimated to be Comox Valley residents, 10% from elsewhere on Vancouver Island and 10% from off-Island.

As a freshwater fishery, the Comox Valley ranks as average, possibly ranking in third place along the east coast of Vancouver Island, behind the Sayward-North Island area and the south end of the island between the Malahat and Nanaimo. The area is unique, however, for the summer run steelhead which do not occur in many Vancouver Island rivers. The Comox Valley is also fairly heavily fished by sports fishermen and additional fishing pressure could damage the resource.

### 3.1.7 Swimming

Swimming and related beach activities are popular summer activities in the Comox Valley. Several beaches of varying sizes exist in the area, with the most popular (from south to north) being:

- Tribune Bay
- Comox Lake
- Goose Spit
- Kye Bay
- Kin Beach
- Kitty Coleman
- Miracle Beach
- Saratoga Beach

These range from large, fine white sand beaches to those having courser gravels or mixtures of sand and gravel. By comparison to those beaches at Parksville and Qualicum, the quality would range from slightly better to slightly worse. A characteristic common to all Comox Valley swimming beaches which differentiate them from the Parksville/Qualicum beaches is the lack of visibility from the main highway, and their relative undeveloped/unimproved nature.

The beaches from Kye Bay north offer the same extensive sand flats as occur in Parksville-Qualicum, making for safe, warm water ocean swimming, a relatively unique feature of Vancouver Island's coastline. However, they are not nearly as popular as the mid island examples. This appears to happen for a number of reasons.

First, there are more actual beaches and kilometres of sand than exist at Parksville-Qualicum which reduces pressure on individual beaches. There is also not as large a regional population or motoring tourist market to utilize these beaches. Perhaps most importantly, however, the beaches are not visible from the highway, are not clearly marked, and can be difficult to find.

### 3.1.8 Backcountry Hiking

The most notable areas for hiking and backcountry camping in the Comox Valley are Paradise Meadows and Forbidden Plateau. Total hiking activity in the Paradise Meadows area (Mt. Washington) is estimated to be about 3,000 parties or approximately 7,500 hikers. About 50% of this activity occurs in July and August. Use of the Forbidden Plateau for summer operation was about 6,000 persons, of which about one-half rode the chair lift.

Paradise Meadows is classed as the best beginner/intermediate hiking terrain on Vancouver Island. It has a good, well established trail network; a variety of lakes in close proximity to one another; good road access to the parking lot; and is very scenic. Well developed trails access 4,000' elevation lakes within 30 minutes of the parking lot, and loop hikes of 2-4 hours offer varied scenery and pleasant hiking for an easy day trip out of Courtenay/Comox.

### 3.1.9 Diving

Scuba diving is a specialized, resource-based activity that has a relatively small but growing market. Estimates indicate the valley has about 2,000 resident divers of which about 500 are active. Non resident divers are estimated to be about 500-600 although they might make up about 5% to 10% (1,500-2,500) of the actual dives taken in the area. (Total dives are estimated to be 20,000 to 30,000 per year.)

The most popular diving areas are around Denman and Hornby Island. The main market areas for non resident divers are Alberta, Saskatchewan and Manitoba in Canada and Washington and Oregon in the United States. To date, the Canadian market has been considerably bigger than the U.S. market. Due to water clarity, the best season for diving is in the fall and winter.

Typical length of stay is an extended weekend of two to four days. Due to the cold water/cold weather aspects of winter diving, the area tends to attract the keen or serious diver.

Although opinions vary as to where the best diving spots are on Vancouver Island, the study area appears to offer average to above average diving by B.C. water standards. Considering that the Georgia Strait, Juan de Fuca Strait and other waters around Vancouver Island are considered to have some of the best diving waters in the world, the overall ranking is very good.

## 3.2 Tourism Facilities

### 3.2.1 Tourist Accomodations

The Comox Valley contains a mix of "roofed" (non-campground) accommodation including hotels, motels, cabins and bed and breakfast operations. The following table shows the breakdown of the 47 properties and 841 units.

<u>Category</u>	<u>Number</u>	<u>Units</u>
Hotels	6	281
Motels	11	338
Lodge/Cabins/Cottages	21	148
Condominiums	1	45
Bed and Breakfast	8	29
	<u>47</u>	<u>841</u>

Source: Tourism Comox Valley, Comox Valley Accommodation Inventory.  
Oct. 1986.

These properties vary in size from two room bed and breakfasts to hotels in excess of 100 rooms. They also provide a range of accommodation quality from rustic cottages to first class urban hotel rooms. Prices range from in the low 20 dollar range to over \$60.

The Comox Valley contains 21 campground/Recreational Vehicle Parks totaling 1,089 units. These range in size from 10 sites to 220 sites with the average just over 50 sites. This is slightly higher than the provincial average of 45, but is highly skewed by the 3 large campgrounds, as 13 campgrounds operate less than 50 units.

Fourteen properties offer some combination of sewer/power/water to at least a portion of their sites. Ten properties provide full services. Virtually all campgrounds are located along the ocean shore.

Boat launches and beach access are common features of these campgrounds as are playgrounds. Laundries, showers and sani-stations are only provided by a small number.

All but the Miracle Beach Provincial Park and Kitty Coleman are privately operated while Kye Bay is operated by a service club.

The bulk of the hotel/motel properties are located in Courtenay with the most cottages/cabins located along the coast north of Comox. This area also contains about 75% of the campground facilities while the next largest concentration is on Denman and Hornby Islands.

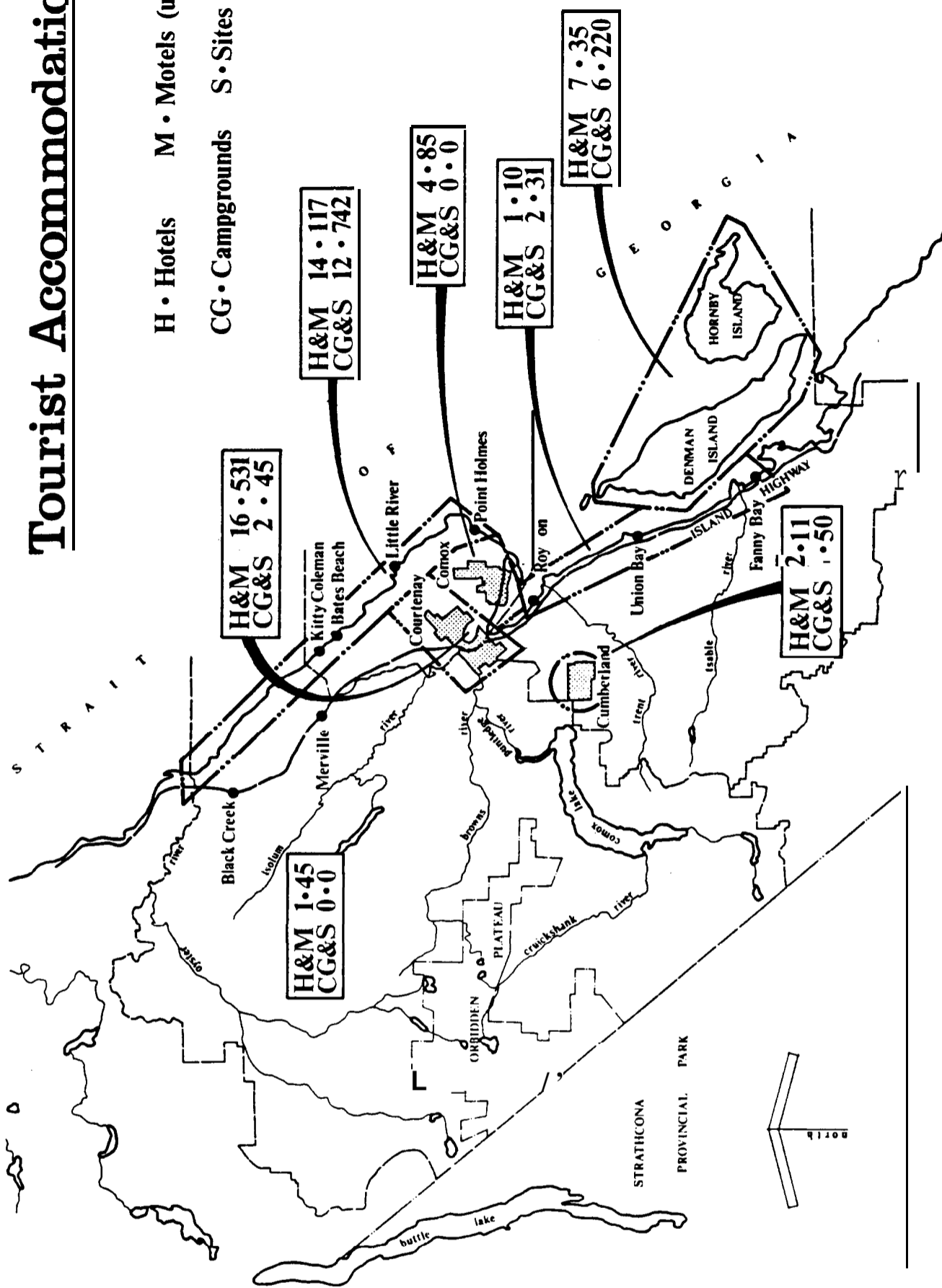
<u>LOCATION</u>	<u>CAMPSITES</u>	<u>SITES</u>	<u>HOTEL/MOTEL/ B &amp; B</u>	<u>UNITS</u>
Courtenay	2	45	16	531
Comox			4	85
<b>Cumberland</b>	1	50	2	11
Fanny Bay - Royston	2	31	1	10
Denman - Hornby Islands	6	220	7	35
Point Holmes - Oyster River	12	742	14	1 1 7
Inland Areas			1	45
	<u>23*</u>	<u>1,089</u>	<u>45*</u>	<u>834</u>

\* Units different than classification totals due to cross-classifications and some properties having units and sites.



# Tourist Accommodation

H • Hotels    M • Motels (units)  
 CG • Campgrounds    S • Sites



Comox Valley Tourism Strategy

FIGURE 2

### 3.2.2 Commercial Attractions

Commercial and/or public attractions are relatively scarce in the Comox Valley. There are no dedicated commercial or tourist attractions while there are facilities of interest to visitors. The most significant are:

- Filberg Lodge
- Courtenay and District Museum
- Cumberland Museum
- Miracle Beach Nature House
- Puntledge River Hatcheries
- CFB Comox, Air Base
- HMCS Quadra, Sea Cadet Training Centre

Other "attractions" fall into the category of tours and includes:

- Comox District Free Press (by arrangement)
- Abundance Sheep Farm (by arrangement)
- U.B.C. Research Farm (by arrangement)
- Bayne's Sound Oysters (by arrangement)
- Mac's Oysters (by arrangement)
- Most of the several dozen small craft/arts studios (by arrangement)
- Leeward Pub (Saturdays and by arrangement)
- Field Sawmill (by arrangement)
- Dairyland Milk Plant (by arrangement)
- McDonald's Restaurant (by arrangement)

It is noted that we have not specified such commercial attractions as the downtown cores of the three municipalities as tourist attractions, even though they are "attractions" and they are "commercial" because they are not stand-alone tourism oriented facilities.

### 3.2.3 Events

Although the area's list of built tourist facilities is small, the Comox Valley has an abundance of sizeable annual events. Typical events are of a weekend's duration, taking place in July or August.

The largest, and probably the most well known event, is the CFB Comox Airshow. It typically averages about 50,000 spectators, with the total reaching 68,000 in 1986. Other events attracting over 5,000 spectators over the course of an event are the Snow to Surf Race, Canada Day Celebrations, Coast Arts Fair, Tri-K-Triathlon, Filberg Festival, Comox Nautical Days and the Comox Valley Fall Fair.

Other events or activities that are regularly scheduled include:

golf tournaments  
softball tournaments  
rodeos/horse shows/equestrian events  
sailboat races/cruises  
art shows  
ski races  
car races  
**Courtenay** Youth Music Centre/Festival  
**Courtenay** Little Theatre productions  
**Coval** Choristers productions

It is noted that many of the above activities include several actual "event-dates", throughout the season. For example, there have been a few golf tournaments and several softball tournaments held each year. The same is true for various races (boat, ski, automobile and horse). The Courtenay Youth Music Centre also hosts approximately 18 individual performances throughout the summer with a combined attendance of around 4,000 persons (1986).

COMOX VALLEY MAJOR ANNUAL EVENTS

(1,000+ Spectators)

<u>EVENT</u>	<u>LOCATION</u>	<u>TIMING</u>	
Winter Carnival	Courtenay	1st week February	P = 40 - 100 O = 10 - 25 S = 200 - 1000
Snow to Surf Race	Courtenay - Comox	1st Sunday May	P = 1250 Vo = 150 S = 10 - 15,000+
Sandcastle Contest	Miracle Beach	3rd Weekend May	P = 100 - 200 O = N.A. S = 200 - 1000
Canada Day Celeb.	Courtenay	July 1st Wknd.	P = 400 - 500 Vo = 30 - 50 S = 5000+
Coast Arts Fair	Courtenay	2nd Weekend July	P = 100 - 200 Vo = 30 - 100 S = 3000 - 5000+
Tri-K-Triathlon	Comox	3rd Weekend July	P = 100 - 200 Vo = 300 S = 7000+
Filberg Festival	Comox	Aug. 1 Wknd.	P = 100 O = 50 S = 3000 - 7000+
C.F.B. Airshow	Comox	Aug. 1 Wknd.	P = N.A. O = N.A. S = 50,000+
Elks Rodeo	Courtenay	Aug. 1 Wknd.	P = 200? O = 50 S = 2000 - 4000
Nautical Days	Comox	Aug. 1 Wknd.	P = 100 - 1000 O = 50 - 100 S = 4000 - 5000+
Fall Fair	Courtenay	2nd Wknd. Sept.	P = 200 O = 25 - 40 S = 2000 - 6000+
Empire Days	Cumberland	May Day Wknd.	N.A.
Lake Days	Cumberland	July 1st Wknd.	N.A.
Sea Festival	Union Bay	June Wknd.	N.A.

P = Participants  
O = Organizers  
v = Volunteers  
s = Spectators

### 3.2.4 Food Services

The Comox Valley has an abundance of food" service operations ranging from fast food and coffee shops to ethnic and fine dining rooms. Tourism Comox Valley's restaurant index lists 81 establishments. (It is noted that some combining of food service outlets is reflected in this total, particularly when two or more outlets may exist under one roof, i.e. a hotel having a coffee shop, dining room and lounge all offering food.)

<u>LOCATION</u>	<u>Number</u>	<u>Percentage</u>
Courtenay	52	64%
Comox	14	17
Cumberland	3	4
Royston - Fanny Bay	5	6
Saratoga - Oyster River	4	5
Hornby - Denman Island	3	4
	<u>81</u>	<u>100%</u>

In terms of menus and restaurant styles, there is a broad mixture:

Fast Food/Take Out	22	27%
Family Style	6	7
Coffee Shop/Deli	16	20
Restaurant/Specialty	18	22
Fine Dining	7	9
Pub	7	9
Teahouse	5	6
	<u>81</u>	<u>100%</u>

Seating capacities cover the range from less than 10 seats for some of the deli's and take-out establishments to well over 100 seats for the family and specialty restaurants.

The 81 Comox Valley restaurants are equivalent to a per capita ratio of one restaurant for every 486 people (residents). By comparison, the Greater Victoria ratio is one for every 462 residents while the rural, more isolated area of Highway 16 between Hazelton and Smithers has a ratio of one restaurant for every 357 residents. It is noted these ratios take into account residents only.

### 3.2.5 Cultural

Although there is some overlap among categories under the broad heading of Tourism Facilities, there are several facilities of tourist appeal in the cultural/entertainment category. This includes two museums, three theatres, six art galleries, and 19 craft shops.

#### CULTURAL, ARTS AND ENTERTAINMENT FACILITIES

<u>CATEGORY</u>	<u>NAME</u>	<u>LOCATION</u>	<u>SEASON</u>
Museums	Courtenay and District	Courtenay	May - Sept.
	Cumberland	Cumberland	Year Round
Theatres	Sid Williams Civic Theatre	Courtenay	Year Round
	Caprice Theatres (1 and 2)	Courtenay	Year Round
Art Galleries	Lemon Tree Gallery	Courtenay	
	Objects D'Arts	Courtenay	
	Arts Alliance.	Courtenay	
	Backroom Gallery	Courtenay	
Libraries		Courtenay	Year Round
		Comox	Year Round
		Cumberland	Year Round
Craft Shops	Art Stop	Courtenay	Year Round
	Harvest Home	Courtenay	
	Rolling Pin	Courtenay	
	Whale's Tale Toys	Courtenay	
	Ultra Wood and Glass	Comox	
	Little River Pottery	Comox	
	Skookum Toys	Royston	
	Woolgatherers	Royston	
	Old Jail House	Union Bay	
	Gift Shop		
	Discovery House	Denman Island	May - Sept.
	Pottery by Rosalynne	Denman Island	Year Round
	The Corner Clayforms	Denman Island	May - Sept.
	Le Baron Pottery	Denman Island	Year Round
	Porcelain Extra-ordinaire	Denman Island	May - Oct.
	Ridge Pottery	Denman Island	Year Round
Velva's Glass House	Denman Island	Year Round	
Earthen Vessels	Hornby Island	Year Round	
Wayne Ngan	Hornby Island		

Note: Two drive-in theatres exist but are closed and the E.W. Bickle Theatre is undergoing conversion to a cabaret.

### 3.2.6 Recreational

The Comox Valley contains a mix of recreational facilities, both urban and rural. The inventory includes two ski areas, three golf courses, three ice rinks, one fair ground, four sports centres, one automobile race track and about two dozen tennis courts. These facilities cater to recreational pursuits of both locals and visitors, and are tallied here to depict the range of recreational amenities.

#### COMOX VALLEY RECREATIONAL FACILITIES

##### GOLF COURSES

<u>Name:</u>	Sunnydale	Comox	Longlands
<u>Location:</u>	N. Courtenay	Comox	N. Comox
<u>No. of Holes:</u>	18	9	9 (par 3)
<u>Year Opened:</u>	1935	1933	1979
<u>Season:</u>	Year Round	Year Round	Mar.-Oct.

- Pacific Playgrounds has a par 3 golf course.
- CFB Comox has an 18 hole course open to CFB members and guests.

##### SKI AREAS

<u>Name:</u>	<u>Mt. Washington</u>	<u>Forbidden Plateau</u>
<u>Number of Lifts:</u>	2 triple chairs	1 double chair
	2 double chairs	3 T-bars
	1 beginner tow	1 beginner tow
<u>Lift Serviced Vertical</u>	1,600 ft.	1,150 ft.

##### SPORTS CENTRES

Comox Valley Sports: Ice rink, indoor swimming pool, weight facilities, outdoor running track.

Courtenay Recreation Association: Gymnasium, 2 squash courts, weight room, outdoor pool, tennis courts, clubhouse, lawn bowling, horseshoes, ball diamonds, soccer fields.

Cumberland Recreation Institute: Universal gym, 2 squash courts, whirlpool, sauna.

Comox Recreation Commision: 2 gyms, weight room, tennis courts, ball diamonds, soccer fields.

FAIRGROUNDS

Comox Valley Fairgrounds: Curling rink, meeting rooms, horse track.  
 Bear Creek Ranch: Indoor rodeo ring, stables, training area.

MARINAS

Pacific Playground	Oyster River
Courtenay City Marina	Courtenay
Comox Municipal Marine	Comox
Fords Cove Marina	Hornby Island
Fanny Bay	Fanny Bay

BOAT RENTAL FACILITIES

Bates Beach Boathouse	Bates Beach
Bates Beach Resort	Bates Beach
Killarney Resort	Saratoga Beach
King Koho	Little River
Miracle Beach Resort	Black Creek
Pacific Playground	Oyster River

PARKSPROVINCIAL:

Miracle Beach Park	Black Creek	135ha
Kitty Coleman Park	Merville	10ha
Kin Beach Park	Comox	6ha
Wood Mountain Ski Park	Forbidden Plateau	97ha
Sandy Island Marine Park	Denman Island	33ha
Fillongly Park	Denman Island	23ha
Helliwell Park	Hornby Island	69ha

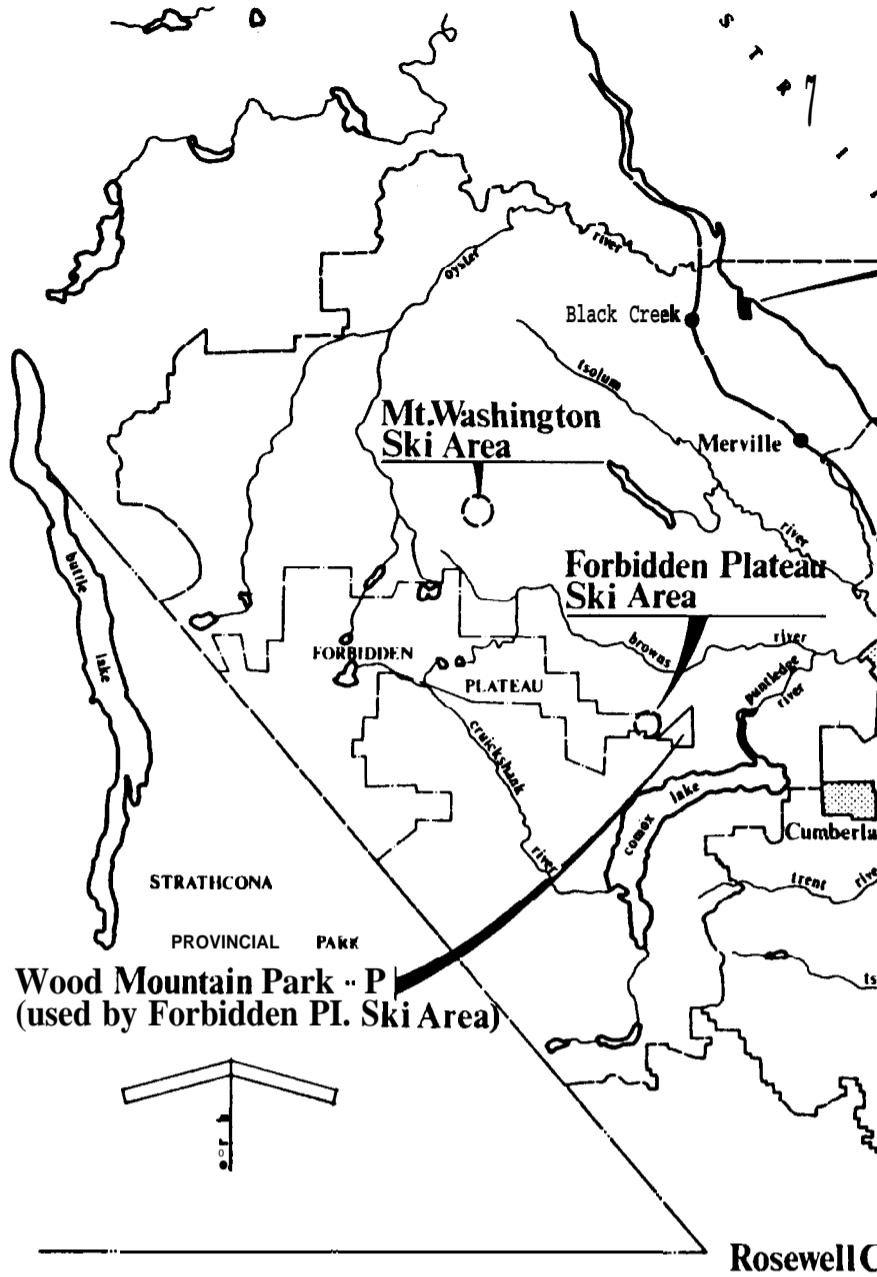
REGIONAL:

Goose Spit	Comox	5ha
Seal Bay	Comox (N.)	139ha

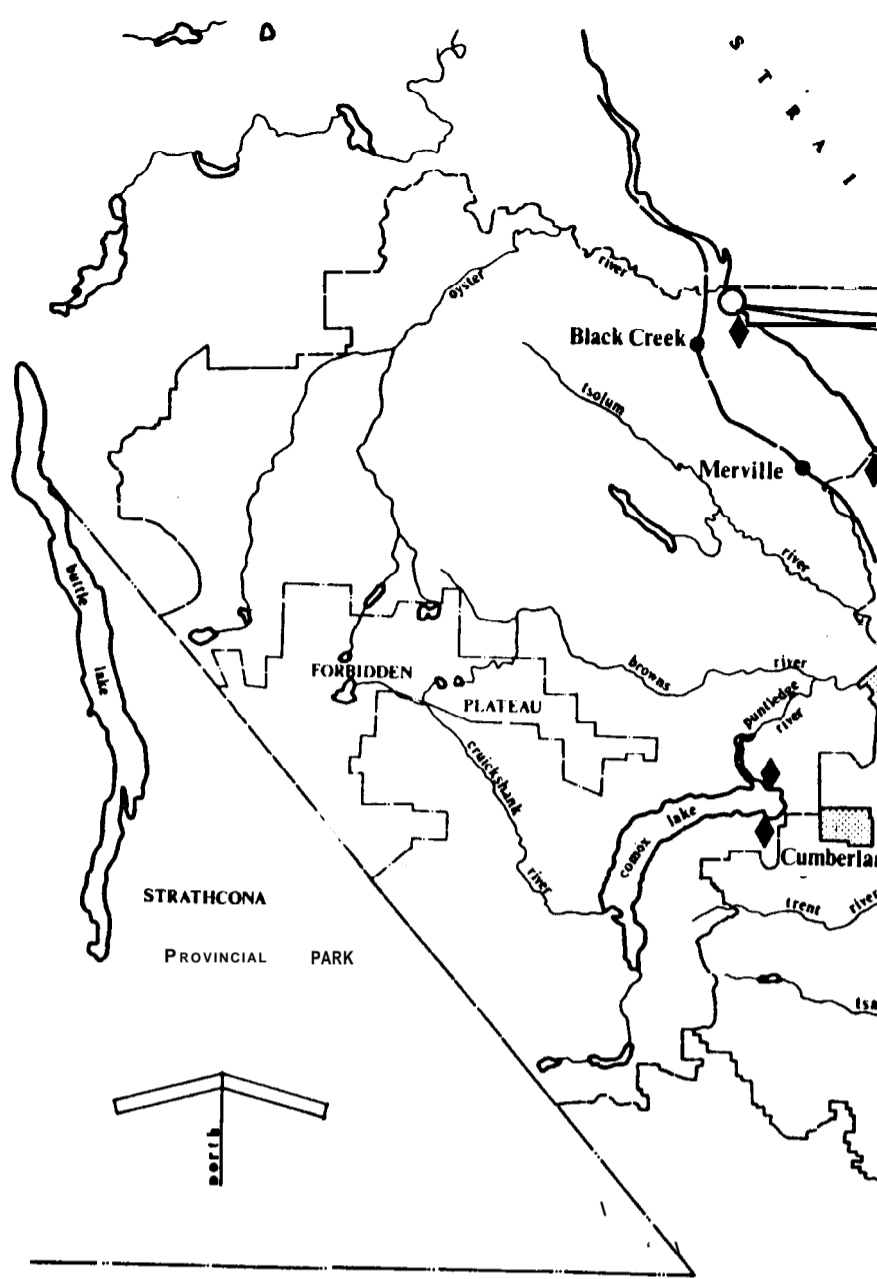
MUNICIPAL:

18 parks	Courtenay	43ha (total)
19 parks	Comox	28ha (total)
2 parks	Cumberland	25ha (total)





# Comox Valley Tourism S



# Comox Valley Tourism S

### 3.2.7 Saratoga Raceway

Motorsport is amongst the most popular spectator events in North America and the sport is growing in popularity. Auto racing has a proven propensity to attract tourists and opportunities exist to improve the local facility to increase its tourist appeal.

Saratoga Raceway is an oval track with limited facilities and services. It is, however, in sufficiently good condition to stage a number of events during the season from May through October. The bleachers and concessions provide the basic amenities required for spectators. The track itself, however, needs upgrading as does the infield and parking areas.

The Upper Island Racing Association sponsors 20 to 22 events each summer, each for a paid attendance of about 25,000 annually. About 35 car entries are entered for each event. Events generally include stock car racing although occasional special events are organized including the Island Championship (stock cars) and mud racing.

The approximate breakdown of attendance by type of event is shown below.

	<u>No. of Events</u>	<u>Average Attendance</u>	<u>Distribution of Spectators</u>			
			<u>Comox Valley</u>	<u>Campbell River</u>	<u>Elsewhere</u>	
Special Events	2	1,300	40%	35%	15%	
Local Events	20	900	50%	45%	5%	

Our estimates translate to a total of 10,560 tourist visits to the Comox Valley. It should be recognized, however, that 85% of this total represents visitors from the Campbell River area who will spend little time or money in the Valley outside of the race track itself. The balance of visitors (some 1,550 spectators can be recognized as tourists who have the propensity to stay and spend money in the Comox Valley.

A number of resources exist that may be capitalized on to develop motorsport events as an important tourism attraction in the Comox Valley. It is important to recognize that it will be the events that will attract tourists, not the motorsport facility, but that important and high appeal events cannot be staged without a special facility. A summary of existing resources is provided below:

- an established motorsport association exists which successfully stages a high number of motorsport events annually;

- a solid base of motorsport enthusiasts exists in the Comox Valley/Campbell River area;
- motorsport interest appears solid in the Valley's important visitor market on southern Vancouver Island (especially Nanaimo and Victoria);
- motorsport interest is demonstrated to be solid on the Lower Mainland;
- the interest in and economic benefits derived from motorsport throughout North America are substantial; and
- motorsport events appeal to tourists of all ages which offers particular potential to attract the high level of pass-through family traffic and hold families in the Valley for an additional night.

Several factors have and will continue to constrain motorsport event development. To successfully contribute to tourism industry growth, these constraints need to be overcome. They are summarized below.

- existing facilities need upgrading or a new motorsport centre needs to be developed if major events with significant appeal in major tourism markets are to be staged; and
- local residents have objected to noise at Saratoga Raceway and development of this 'attraction will undoubtedly face some opposition on this issue.

### 3.2.8 Arts Facilities and Events

The Comox Valley has a well established and enthusiastic arts community. Many groups have been formed to pursue individual interests in the visual, performing and literary arts. Most of the individuals and groups within these categories have come together under three organizations:

- the Comox Valley Arts Council
- the Arts Alliance
- The Shoreline Arts Society.

The Comox Valley Arts Council is considered to be the umbrella organization representing visual, performing and literary artistic interests in the Valley. It was established 21 years ago with one of its chief objectives being to stimulate interest in the arts in the Comox Valley. Within the last three years it has formed the Representative Council of the Arts which includes some 50 individual groups with special artistic interests in the Valley. The Arts Council is affiliated with the B.C. Festival of the Arts and serves an important role in assisting with ongoing distribution of public sector funds directed to individual arts groups in the study area.

The Arts Alliance works closely with the Arts Council but focusses its attention on the professional and commercial aspects of arts in the Valley. The one major commercial arts event that was held in the Valley, the "Renaissance Fair", was organized and operated under the auspices of the Arts Alliance. This annual event has now been restructured and is organized and promoted by the Shoreline Arts Society. The Arts Alliance is now responsible for operations of the art gallery and Comox Valley Crafts, a successful and expanding crafts shop located in Courtenay.

The Shoreline Arts Society is now responsible for the "Coast Arts Fair", an increasingly important attraction which is held annually. Following the cancellation of the "Renaissance Fair" in 1984, the "Coast Arts Fair" re-established an annual arts fair in 1985. The Society is working with the Regional District and other interest groups to plan the development of multi-use facilities at the Exhibition Grounds which could assist in attracting more participants and visitors to the "Coast Arts Fair" in the future.

Arts oriented activities and events in the Comox Valley are many and varied. While most are local in orientation and appeal, several attract visitors from outside of the study area and, therefore, contribute directly to the Valley's tourism industry. Examples of these activities with tourist appeal are listed below:

- the Filberg Festival;
- the Coast Arts Fair;
- Coval Chorester performances (two main shows annually);
- Courtenay Little Theatre performances (two major productions annually); and
- the Courtenay Youth Music Centre summer program and annual festival (18 events throughout the summer)

This is not an exhaustive list of arts and cultural activities that appeal to visitors, but is representative of the success achieved to date by Comox Valley arts groups and organizations in staging major events despite a variety of physical constraints.

Facilities in the Comox Valley that can be used effectively to stage major performances or hold important exhibitions are severely limited, despite the high level of interest reflected by the arts community. School gymnasiums are often utilized for local performances, especially those at Courtenay High School and Vanier High School, but are far from suitable for major events. The Courtenay Youth Music Centre makes extensive use of Vanier High School in the summer, but are restricted in the extent of their program due to the lack of suitable facilities during the rest of the year.

The Civic Theatre in downtown Courtenay has long served as the principal home for the performing arts when major performances are staged. It too, however, has severe limitations for effectively accommodating major and high calibre events. Built in the early part of this century, most of the "high tech" requirements of today's performing artists are not incorporated into the facility. While seating about 420, it lacks adequate wing space, dressing room facilities, lobby space, workshop areas, storage space, prop access, sound stage room and rehearsal hall. The acoustics make it unsuited for orchestral performances. Despite these and other deficiencies, the Civic Theatre has served the Comox Valley well over the years and without it the artistic pursuits of Valley residents may well not have developed to the extent they have at the present time.

Other facilities exist in the Valley that offer some support to the arts community. Specifically, meeting room and limited convention space at hotels, the Elks Hall, the Legion, and the Recreational Institute in Cumberland have been used to some extent for artistic pursuits. None of these, however, are considered to be effective areas for the staging of major performances. This facility constraint has prevented the Valley organizations representing the arts from promoting and attracting a variety of provincially, nationally and internationally recognized touring groups and festivals to the Valley.

### 3.3 Infrastructure

The term infrastructure when referring to the tourism industry, refers to the facilities, utilities and services that make it possible for people to travel. Tourism infrastructure includes the transportation systems, sewer, power, water, health care facilities, and-land resources.

#### 3.3.1 Transportation

The Comox Valley is served by air, rail, marine and road transportation systems. The following are the commercial carriers, their schedules and capacities.

##### Air:

<u>Carrier</u> -	Time Air	Air B.C.	Burrard Air
<u>Air Strip</u> -	CFB Comox	CFB Comox	Air Park
<u>Plane Capacity</u> -	36	30-50	8-10
<u>Seasons</u> -	All Year	All Year	All Year
<u>Schedule</u> -	3 / day	4/day	2/day

##### Rail:

<u>Carrier</u> -	VIA Rail (E & N Railway)
<u>Stations</u> -	Courtenay, Union Bay, Buckley Bay
<u>No. of Cars</u> -	Two (usually)
<u>Seating Capacity</u> -	45/car
<u>Schedule</u> -	Arrive Courtenay northbound @ 12:30 p.m. Leave Courtenay southbound @ 1:15 p.m.

##### Ferries:

<u>Route</u> -	Comox to	Buckley Bay	Denman Is.
	Powell River	to Denman Is.	to Hornby Is.
<u>Capacity</u> -	130 vehicles	30 vehicles	16 vehicles
	700 passengers	200 passengers	150 passengers
<u>Schedule</u> -	4 return trips	18 return trips	12 return trips

##### Bus :

<u>Carrier</u> -	Island Coach Lines
<u>Daily Departures</u> -	6 northbound, 5 southbound
<u>Ferry Connections</u> -	4/day
<u>Terminal</u> -	Courtenay

Taxi:

<u>Firm</u> -	United Cabs
<u>No. of Cars</u> -	12
<u>Schedule</u> -	24 hr.

Car Rentals:

<u>Firm</u> -	Budget	<b>Tilden</b>	Rent-a-Wreck
<u>Location</u> -	Airport	Airport	<b>Courtenay</b>
	<b>Courtenay</b>		

Highways: (Main traffic arteries)

<u>North-South</u> -	Island Highway (#19) Headquarters Rd. Bates Rd.
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<u>East/West</u> -	Royston Rd. Cumberland Rd. Lake Trail Rd. Piercy/Forbidden Plateau Rd.
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3.3.2 Land Status/Land Use

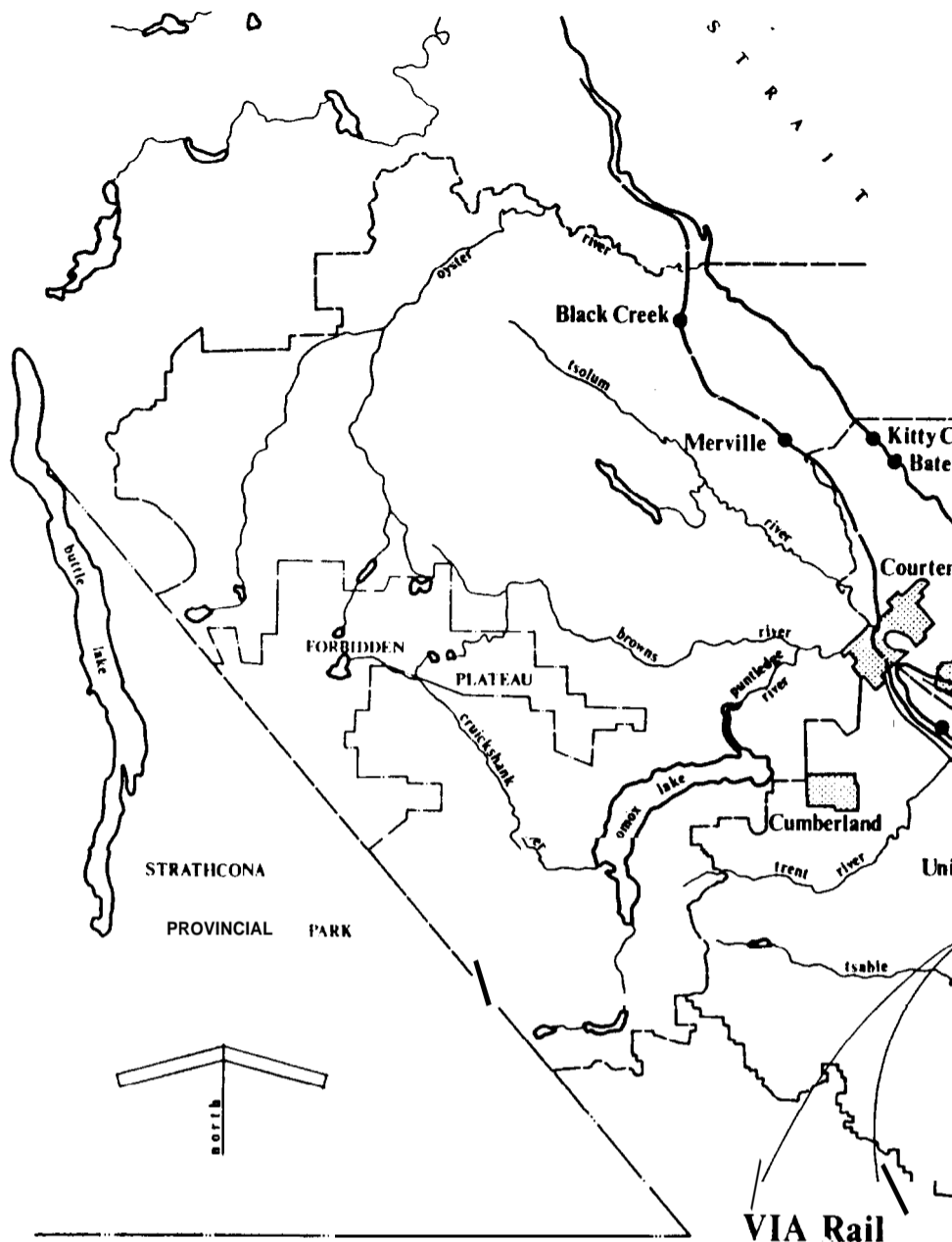
Status of land in the Comox Valley is a mixture of public and private holdings. North of **Courtenay** and east of the **powerline**, privately owned agricultural land predominates. Privately held residential land is common along the coast while inland areas (**west of the powerline**) are virtually all controlled by forest companies as private lands or tree farm **licences**.

Agricultural land, as designated by the Agricultural Land Reserve (ALR), comprise about 15,000 hectares in the Comox Valley while about 3,500ha are "improved" and actively farmed.

Although development is not intensive in the Comox Valley, the entire length of Vancouver Island waterfront is virtually all unavailable for future tourist-commercial development. Currently\* about 55% of the coastline is developed for farm or residential with 6% commercial, 9% park/greenbelt/public access, 8% institutional, 7% roads, and 14% vacant. A considerable portion of the vacant lands are in environmentally sensitive areas or are industrially owned.

\* Comox Valley Official Settlement Plan, p. 31.





VIA Rail  
1 Return  
Trip Daily

## Comox Valley Tourism Stra

### 3.3.3 Utility Services

#### Water:

Water is supplied to Courtenay and Comox through the regional district system while Cumberland is responsible for its own water system. Private systems through improvement districts supply other areas of the study area, including Saratoga Beach, Union Bay, Buckley Bay and Fanny Bay.

#### Sewer:

The regional district provides sewage collection and treatment for Courtenay and Comox, while Cumberland maintains their own systems. All other areas are on septic tanks.

#### Utilities:

Power is supplied by B.C. Hydro and telephone by B.C. Tel.

### 3.3.4 Protective/Health Services

For police protection the Comox Valley is served by the RCMP, Courtenay detachment. The detachment contains a complement of about 45 officers responsible for general duty and highway patrol. They are responsible for the entire Comox Valley including Hornby and Denman Island.

Firefighting is the responsibility of nine separate volunteer fire departments located in the three incorporated municipalities of Courtenay, Comox and Cumberland, plus the unincorporated areas of Union Bay, Deep Bay, Denman Island, Hornby Island, CFB Comox and Oyster River.

Search and Rescue is carried out by both civilian and military organizations. The Comox Valley Ground Search and Rescue, including a special mountain rescue unit, provide the civilian service, while the 442 Search and Rescue Squadron provides services throughout Western Canada.

Health care is provided in one hospital and one health centre. St. Joseph's Hospital in Comox provides 145 acute care beds and a 45 bed extended care unit. The Cumberland Health Centre provides 50 long term beds and operates a diagnostic centre and clinical services.

### 3.4 Hospitality Services

#### 3.4.1 Information Centre

The Comox Valley Chamber of Commerce runs the main visitor information office in the Comox Valley through their office in Courtenay. The office is open year round, with summer hours seven days a week from 8:00 a.m. to 8:00 p.m. and winter hours five days a week from 8:30 a.m. to 4:30 p.m..

Small, satellite Information Centres also operate in Cumberland and in Union Bay. Another satellite centre used to operate at Comox, but was closed for the 1986 season.

#### 3.4.2 Retail Services

The communities of Courtenay, Comox and Cumberland offer the range of retail goods and services commensurate with communities of their populations. Retail activity in Courtenay is centered in the city centre area of about three blocks square, with several additional small retail/commercial blocks, and the 30 store Driftwood Mall south of the city.

Comox's retail area is centered along Comox Avenue with a 41 store mall located in the downtown core. Cumberland's retail merchants are almost exclusively located along a five block section of Dunsmuir Avenue.

The unorganized communities have little in the way of retail commercial, usually consisting of a gas station and grocery/convenience store.

### 3.5 Conclusions

- The Comox Valley possesses a range of good quality natural resources generating a variety of tourist activities. The most well known and most popular are skiing and salmon fishing. Other activities based on the area's natural features which cater to varying numbers of visitors are sightseeing, boating/sailing, hunting, freshwater fishing, swimming/beach activities, hiking and diving.
- The study area contains a mixture of hotels, motels, cabins and bed and breakfast operations totaling 47 separate properties with 841 units. The area has 21 campgrounds/recreational vehicle parks totaling in excess of 1,000 sites.
- Commercial attractions are notably scarce with the few that exist being of a heritage, naturalist or military nature. The area **does** possess a broad range of staged events throughout the year, covering a variety of themes. These cater to between 1,000 and 50,000 people.
- The valley has over 80 food service operations, including a mix of fast food outlets, family style restaurants, delis, specialty/ethnic restaurants and teahouses.
- Cultural and entertainment facilities include two museums, three theatres, six art galleries, a fair ground and many craft shops. In terms of recreational facilities, the area has two ski areas, three public golf courses, three ice rinks, four sports centres, one automobile race-track, and about two dozen tennis courts.
- Access to the Comox Valley is available by a variety of modes including three scheduled air carriers, VIA Rail, three ferry routes, and the Island Highway. Transportation services available include bus lines, taxi and car rentals.
- Hospitality services include one main tourist information office and two seasonal offices, and a variety of retail goods and services. Generally, Comox Valley residents appear to understand the benefits of increased tourism and are supportive of the industry. This endorsement is made within the confines of resource carrying capacity, environmental quality, impact on lifestyle, and scale of development.

## 4.0 THE VISITORS

### 4.1 Visitor Volumes

Determining the volume of tourism in a community, in terms of numbers of visitors and revenues, is difficult since visitors do not "go through the turnstiles"\* and therefore cannot be accurately counted. Consequently, measures have to be derived which attempt to estimate the volume and value of tourism.

The task is made more difficult by the lack of up-to-date and detailed surveys of visitor activities. To overcome these shortcomings, a series of techniques are used to approximate the visitation totals.

The two main variations are to approach the assessment from the supply or "tourist facility" side and from the demand or "user" side. The user sources include existing surveys of tourist visitation to the area. The supply side of the measurement is made by documenting the performance of various sectors of the travel industry such as accommodation, ski areas, etc.

Since no up-to-date, specific visitor survey work has been done on the Comox Valley, approximations have to be used. The most detailed survey which allows reference to at least part of the Comox Valley is Visitors '79, an extensive but dated survey produced by Tourism B.C.. Its limitations in addition to being dated are that it includes only travel during May to October and it deals only with non-B.C. resident travel.

Another source which can provide some information on B.C. residents, but only to the level of detail of Vancouver Island is the Canadian Travel Survey, a survey conducted by Tourism Canada in alternate years.

As it turns out, both the Visitor '79 survey and the Canadian Travel Survey are unacceptable to **analyse Comox** Valley tourist volumes because the **Comox** Valley cannot be isolated in sufficient detail. The Canadian Travel Survey can only provide details of visits by Canadians to Vancouver Island, while Visitors '79 special computer data runs can only isolate **Courtenay**. The number of assumptions needed to approximate the **Comox** Valley are too great to provide meaningful results. Consequently, visitor volume estimates have to be derived from assessing performance of the travel industry. To determine the number of people who stay overnight in the study area, the number of room nights occupied by tourists in hotel, motel and campground accommodation are required. To this total are added the number of people who stay with friends and relatives.

The following chart (COMOX VALLEY TOURIST ESTIMATE) shows the relationship of room nights, length of stay, tourist parties, party size and tourist volumes. As calculated, the estimated volume of tourists overnighting in the Comox Valley is just over 160,000 persons.

This is the current market of tourists who stay overnight. There is another category of visitors that visit only for the day or are passing through on their way elsewhere. The estimate for this group is about 820,000.

COMOX VALLEY TOURIST ESTIMATE

<u>Accommodation</u>	(1) <u>No. of Properties</u>	(2) <u>Units/ Sites</u>	( 3 ) <u>Room Nights</u>	(4) <u>Length of Stay</u>	(5) <u>Tourist Parties</u>	(6) <u>Party Size</u>	<u>Tourists</u>
Hotels/Motels	17	619	48,300	3.0	16,100	3.0	48,300
Lodges/Cabins/Condos	22	163	13,400	5.0	2,680	3.0	8,000
Bed and Breakfast	8	29	500	2.0	250	2.0	500
Campgrounds	<u>21</u>	<u>1,089</u>	<u>64,200</u>	2.7	<u>23,800</u>	2.4	<u>57,120</u>
	68	1,900	126,400		42,830		113,900
Total tourists staying in "commercial" accommodation							113,900
(7) Proportions of people staying with friends/relatives							47%
Number of visitors staying with friends and relatives							<u>53,500</u>
Total tourists <u>overnighting</u> the Comox Valley							<u>167,400</u>

- (1) Total number of accommodation properties in the Comox Valley as per Tourism Comox Valley inventory, summer 1986.  
(Note: Properties having rooms and campsites are counted twice.)
- (2) Total number of units/sites represented by the properties.
- (3) Room nights have been calculated from survey information on occupancy rates and proportions of tourist business.  
Samples ranged from 90% for hotels and motels to 25% for bed and breakfasts.
- (4) Length of stay for hotels/motels for Visitors '79 Courtenay analysis and others were personal communication and calculated averages.
- (5) Tourist Parties are Room Nights divided by Length of Stay.
- (6) Party size from Visitors '79, Courtenay averages (hotels/motels/lodges), Canadian Travel (campgrounds), personal communication (Bed and Breakfast).
- (7) Visitors '79 (Courtenay analysis).

TOTAL VISITORS IN OR PASSING THROUGH  
THE COMOX VALLEY

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(1985)

Total out-of-province visitor parties, May-Oct. 1979 (Visitors '79 Tourist Survey)	125,000
Index to reflect expected improvement to May-Oct. 1985 (Comparison of U.S. entries to B.C.)	1.15
Index to reflect out-of-province traffic for the full year, 1985 (Ratio from U.S./Canada border crossings)	1.36
Index to reflect non-Comox Valley, B.C. Residents	1.40
TOTAL VISITOR <u>PARTIES</u> TO AND THROUGH THE COMOX VALLEY	<u>273,700</u> parties
Party size (Visitors '79, operator interviews)	3.0
TOTAL <u>VISITORS</u> TO AND THROUGH THE COMOX VALLEY	<u>821,000</u> visitors



## 4.2 Visitor Characteristics

Characteristics of visitors to the Comox Valley have been assessed to provide a visitor profile.

The data source for this information was a major survey of visitors to British Columbia conducted during the spring, summer and fall of 1979. Although badly dated, and dealing only with out-of-province visitors, the ability to isolate survey results for the Comox Valley allows an otherwise unattainable degree of refinement. It is also expected that the characteristics figures are still reasonably appropriate, as downturns in tourism from 1981 to 1983 virtually nullified the increases registered in 1979 and 1980. Subsequent moderate increases in 1984 and 1985 have, however, added to the uncertainty of the figures.

Origin: The Comox Valley gets a larger proportion of Alberta residents than is typical of Vancouver Island. It also attracts a slightly larger international market and a smaller U.S. market.

Party Size: The Comox Valley gets a larger proportion of persons traveling alone with approximately one-half traveling in couples. Together these two categories combine for over two-thirds of overnighting traffic, slightly more on Vancouver Island generally.

Party Composition: Adult couples are 52% of the market while parties with children are a low 12%. Single adults make up 3 of every 10 visitor parties. The family figure is much lower than is typical in British Columbia, where nearly one-quarter of travel parties include children.

Purpose: Pleasure travel is by far the main reason for visiting at over 90%.

Transportation: Automobile travel makes up nearly 60% of all transportation modes with recreational vehicles comprising a further 15%. This is comparable across the three market segments.

Length of Stay: Typical length of stay on Vancouver Island is 4.4 nights. Stays of 3.5 nights are the average among visitors to the Comox Valley.

Activities: Visiting friends and relatives is by far the most important reason for people visiting the Comox Valley. Other important activities include sightseeing, shopping, festivals/events and fishing.

CHARACTERISTICS OF OUT-OF-PROVINCE VISITORS

(1979)

DESCRIPTION	(1) OVERNIGHTING IN <u>COURTENAY</u>	(2) VISITING VANCOUVER <u>ISLAND</u>	(3) VISITING BRITISH COLUMBIA
<u>ORIGIN</u>			
Alberta	38%	18%	33%
Other Canada	26	16	14
Washington	14	18	18
California	4	20	11
Other USA	7	21	18
International	<u>11</u>	<u>7</u>	<u>6</u>
	100%	100%	100%
<u>PARTY SIZE</u>			
1	29%	15%	21%
2	52	51	47
3			11
4	NA	NA	13
5 - 7			9
8+			
Average	3.0	3.0	3.0
<u>PARTY COMPOSITION</u>			
With Children	12%	22%	23%
1 Adult Alone	29	15	20
2 Adults	52	51	47
3+ Adults	<u>7</u>	<u>12</u>	<u>10</u>
	100%	100%	100%
<u>PURPOSE</u>			
Business		3%	10%
Pleasure	91%	90	82
Business/Pleasure	7	7	6
Personal	<u>2</u>	<u>2</u>	<u>2</u>
	100%	100%	100%

Source:

- (1) Visitors '79 - Courtenay analysis.
- (2) Visitors '79 - Summary Report
- (3) Visitors '79 - Summary Report

<u>DESCRIPTION</u>	<u>OVERNIGHTING IN COURTENAY</u>	<u>VISITING VANCOUVER ISLAND</u>	<u>VISITING BRITISH COLUMBIA</u>
<u>TRANSPORTATION</u>			
Automobile	60%	60%	60%
R.V.	15	10	15
Bus	1		2
Boat		8	3
Train	2		1
Aircraft	22	22	19
Other	0		1
	<u>100%</u>	<u>100%</u>	<u>100%</u>
<u>LENGTH OF STAY</u>			
1 night	35%	25%	17%
2 nights	28	27	19
3 nights	4	15	14
4 nights	8	9	10
5 - 7 nights	12	12	19
8+ nights	13	12	21
	<u>100%</u>	<u>100%</u>	<u>100%</u>
Average	3.5 nights	4.4 nights	6.1 nights
<u>MOST IMPORTANT ACTIVITY</u>			
Visiting friends and relatives	48%	26%	28%
Business	15	7	12
Passing Through		5	11
Sightseeing	26	49	29
Festival/Event		NA	NA
Camping	6	2	4
Fishing	5	3	4
Boating		2	4
Other		26	8
	<u>100%</u>	<u>100%</u>	<u>100%</u>

To update this 1979 material and to broaden the information base to include B.C. residents, other information sources were used. This included a tally of the voluntary Visitor Information Centre registrations plus the self-administered accommodation survey conducted by Tourism Comox Valley. The figures are not particularly comparable but are produced here to illustrate the general trends in visitor origins.

COMOX VALLEY VISITOR ORIGINS

<u>ORIGIN</u>	<u>PERCENTAGE</u>	
	A	B
B.C.	23.6%	58.8%
Alberta	14.2	10.3
Saskatchewan/Manitoba	7.8	
Ontario	15.9	12.0
Other Canada	<u>6.0</u>	—
Total Canada	67.5	81.1
Washington/Oregon	3.8	2.3
California	7.9	14.2
Other USA	<u>8.8</u>	—
Total USA	20.5	16.5
Offshore	<u>12.0</u>	<u>2.4</u>
	100.0%	100.0%

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A Comox Valley Visitor Information Centre registrations from  
Sept. 1985 until July 1986.

B Tourism Comox Valley hotel/motel room card survey  
June 1986 to Sept. 1986.

The Tourism Comox Valley survey also produced details on knowledge about the Valley, trip purpose, activities and transportation. According to these results, one-quarter of Comox Valley visitors heard about or found the valley by chance, and another one-quarter through word of mouth.

#### How People Heard About the Comox Valley

By Chance	25%	Travel Agent	16%
Friends	24%	Brochures	6%
Advertising	18%	Other	11%

#### Purpose of Trip to Comox Valley

Passing Through	29%	Business	26%
On Holiday	36%	Other	19%

#### Activities Interested In

Sightseeing	27%	Music	6%
Fishing	14%	Art	6%
Hiking	9%	Skiing	6%
Beach Activities	11%	Golfing	6%
Camping	7%	Diving	3%

#### Mode of Transportation

Automobile	80%	Train	4%
R.V.	2%	Air	4%
Bus	2%	Other	6%

Although the preceding information is far from a perfect analysis of visitor characteristics, it does provide some useful descriptions on visitors to the area. By its nature, however, these surveys are based on information obtained by visitors while they were in the Comox Valley.

Since part of the market research task involves assessing awareness and impressions of the Comox Valley even among people who have not visited, a new survey technique was needed. These answers were obtained through a consumer research project conducted in the Vancouver market. (See Appendix B.)

The key findings about awareness and impressions of the Comox Valley among residents of a major potential market areas are as follows:

- Over three-quarters of all respondents interviewed had previously heard of the Comox Valley.
- Of those who were aware of the Comox Valley, 72% had visited the area (56% of the total sample). The majority of the visits (74%) had occurred within the past six years.
- Sixty-three percent of those who had visited the area had stayed overnight. The majority of those overnight visits (76%) had occurred within the past six years.
- An equal proportion of overnight visitors stayed with friends and relatives as used hotels and motels.
- Sightseeing and visiting friends and relatives were the activities given most often (69% and 45% respectively). Summer time outdoor activities were also very popular.
- when the respondents were asked to mention what first came to mind when thinking about the Comox Valley, a high proportion of the comments were to do with the geographic location and beauty of the area. Recognition of fishing and Air Force Base were also highly mentioned.

#### 4.3 Visitor Expenditures

Calculating visitor expenditures requires the same kind of assumptions as estimating visitor volumes. Our approach has been to break the visitor market down into three segments - those staying overnight, those visiting just for the day, and those passing through. The estimate for overnighters has been derived from the occupancy and room-night information outlined in the section on visitor volumes. This included hotels, motels, lodges, condominiums, bed and breakfasts and campgrounds.

Daytripper expenditures have been based on ski industry estimates of non-local skiers who do not stay overnight, plus a factor to include other daytrippers. Expenditures by pass-through traffic are based on the estimated proportion of highway traffic stopping for gas, food or recreation while enroute elsewhere.

Total visitor expenditures within the Comox Valley totalled nearly \$27 million during 1985. This figure includes \$22.1 million spent by people overnighing in the valley, \$1.4 million by people passing through and \$3.5 million by day-trippers.

COMOX VALLEY TOURIST EXPENDITURES

(1985)

PERSONS OVERNIGHTING IN THE COMOX VALLEY

A.	Expenditures on hotels/motels	\$1,770,000
	Accommodation costs as a proportion of the total	.20
	Total expenditures by persons staying in hotels/motels	8,850,000
B.	Expenditures on lodges/cabins/condos	575,000
	Accommodation costs as a proportion of the total	.20
	Total expenditures by persons staying in lodges/cabins	2,875,000
c.	Expenditures on campsites	642,000
	Accommodation costs as a proportion of the total	.20
	Total expenditures by campers	3,210,000
D.	Expenditures on bed and breakfast	12,500
	Accommodation costs as a proportion of the total	.20
	Total expenditures by bed and breakfast patrons	63,000
	Expenditures by persons staying in commercial accomm.	\$14,998,000
E.	Expenditures by persons staying with friends/relatives	
	126,400 commercial room-nights	
	.47 proportion staying with friends and relatives	
	59,408 total room nights with friend and relatives	
	\$39.50 typical daily expenditure/person	
	3.0 typical party size	
	Estimated expenditure by VFR travelers	7,040,000
		<hr/>
	Total Expenditures by overnight visitors to the Comox Valley	\$22,038,000

PERSONS PASSING THROUGH THE COMOX VALLEY

Visitor Parties 273,000 - (126,400 ÷ 3.0) = 231,000	
Proportion stopping for gas, food or recreation: 20%	
Estimated expenditure per party	\$30
Total expenditure by Persons Passing Through	1,386,000

DAYTRIPPERS TO THE COMOX VALLEY

Visitors through Valley	821,000
No. of day-trip skier visits	38%
Total skier day-visits (1985-86)	190,000
Per diem expenditure (in Valley)	\$40
Total ski related day trip expenditures	2,888,000
Proportion of additional day-trippers	20%
Non-skier day-trip expenditures	578,000
Total day-trip expenditures (in Valley)	<u>3,466,000</u>
TOTAL TOURIST EXPENDITURES IN THE COMOX VALLEY	<u>\$.26,890,000</u>
	Approximately <u>\$27,000,000</u>

#### 4.4 Conclusions

- Visitor estimates for the Comox Valley indicate approximately 170,000 visitors overnight in the valley. The pass-through and day-trip market is nearly five times as large at 820,000 visitors.
- In terms of visitor characteristics, the main market areas are B.C. residents (Vancouver Island, lower mainland and interior), Alberta, other Canada and Washington State. The average party size is 3.0 persons typically comprising a family with children. Automobiles and R.V.'s are the most common mode of transportation, while the average length of stay is just over 3.0 nights. Visiting friends and relatives, and sightseeing are the most popular activities.
- The Comox Valley product appears to be relatively well known in the close-in market areas of Vancouver Island and greater Vancouver.
- It is best known for its general scenic beauty, and the air force base. It is perceived as a rural, quiet, pleasant place to visit. Activities associated with the area are fishing, skiing and events/festivals.
- During the 1980's, there has been a generally improving penetration of the Vancouver market for skiing, fishing, sightseeing, attending events and beach activities.
- Total visitor expenditures within the Comox Valley totalled nearly \$27 million during 1985. This figure includes \$22.1 million spent by people **overnighting** in the valley, 1.4 million by people passing through and \$3.5 million by **day-trippers**.



500 TOURISM INDUSTRY OPERATION5.1 Facility Performance

The travel industry "plant" (or facilities) in the Comox Valley operated to various levels of capacity with the general observation that it is operating considerably below potential.

Annual occupancies in the hotel/motel sector averaged 48% during 1985. By comparison, the hotel/motor hotel average for Vancouver Island was 57% and for the province as a whole was 59%\* during 1985.

The average property size is 52 units, while actual sizes range from 15 to 113 units. The two largest properties comprise 213 units and make up nearly 40% of the hotel room inventory. The accommodation sector has mirrored the economy with a building boom occurring in the late 1970 and early 1980, more than doubling the room inventory. The following recession crippled the industry, resulting in bank take-overs and ownership changes with several properties going through multiple receiverships. The situation appears to be stabilizing, although distress-sale ownership changes were continuing at the time of writing.

The lodge/cabin/condominium market has a very low annual occupancy since all but the Mt. Washington condominiums are summer oriented beach related facilities. Although many are full for the peak 8-10 week school holiday period, annual occupancies equate to less than 25%.

The beach facilities are typically small (averaging less than 10 units), older properties, changing little in appearance over the last three decades. Markets are typically families with multi-year return visits being common.

The Bed and Breakfast sector contains eight businesses of which about one-half have opened in the past two years. Business volumes are varied ranging from only a few room-nights a year to several dozen. For the rural areas and the islands, where most of these establishments are located, these facilities offer a practical and cost-effective accommodation alternative for the visitor.

The ski industry in the Comox Valley consists of two facilities. Forbidden Plateau is the longer established, smaller, closer to town, local ski area while Mt. Washington is the newer, larger, regional class ski area. Due to recent unreliable snow conditions and the problem of mid-week business, the utilization of both mountains averages only about 25% of capacity. On weekends, however, during periods of reliable snow conditions, daily capacities are regularly reached or even exceeded.

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\*

Tourism Industry Association of B.C., Travel Industry Norms, May 1986, p. 61.

The food service sector in the Comox Valley is more heavily patronized by local residents than tourists. There has been a steady increase in the number, variety and caliber of restaurants through the 1980's. The food service sector is traditionally volatile with restaurants closing and new ones opening regularly, and the Comox Valley has been no different.

Events staged in the Comox Valley cover a wide spectrum of activities and generally appear to be well patronized. However, with the exception of larger events, most of the patronage is local and cannot be considered tourism.

Attractions appear to experience the lowest participation rates of all tourist facilities. This could be because most attractions are of a heritage, naturalist or military nature and do not have a major or broad appeal, and are difficult to find/access.

The sports fishing industry has recently become organized with the formation of the Comox Valley Fishing Guides Association in the early 1980's. The association has 26 members who are all single boat, owner operators of which about eight operate on a full-time seasonal basis. Utilization is mixed with most operators taking out the occasional charter throughout the season, with others taking a few per week during the summer season. By comparison, the sports fish guiding business in Campbell River is estimated to be over 10 times as large.

TOURISM FACILITY-UTILIZATION

<u>FACILITY</u>	<u>SIZE</u>	<u>PEAK SEASON UTILIZATION</u>	<u>ANNUAL UTILIZATION</u>
Hotels/Motels	619 units	75-85%	48%
Lodges/Cabins /Condos	163	90-100%	25%
Bed & Breakfast	29	50%	5%
Campgrounds	1,089	85-95%	16%
Ski Areas	2	90%	25%
Food Service	91	60%	40%
Events	varied	good	NA
Attractions	a few	minimal	negligible
Fishing	30 boats	moderate	minimal

Source:

All estimates are based on a combination of personal interviews and operator statistics.

## 5.2 Organization

By its nature, the travel industry is difficult to organize because it is comprised of a wide variety of businesses offering a diverse range of goods and services. Their common element is that they all serve travelers.

Some businesses, such as motel and campgrounds, depend almost exclusively on tourists for their likelihood while others such as restaurants, retail stores, entertainment/facilities and recreation outlets depend on tourism only partially. Many in this latter category do not realize the importance of tourism to their business.

Organization and management of the Comox Valley tourism industry is not in the hands of any single agency, but is affected by numerous organizations. The most visible organizations delivering travel industry services are the:

Comox Valley Chamber of Commerce	visitor information, developer assistance
Cumberland Chamber of Commerce	visitor information, developer assistance
Union Bay Business Association	visitor information, developer assistance
Ski Comox Valley	external promotion
Tourism Comox Valley	external promotion
City of Courtenay	funding, zoning, services
Town of Comox	funding, zoning, services
Village of Cumberland	funding, zoning
Regional District of Comox-Strathcona	zoning, services
Islands Trust	zoning (Denman and Hornby)

Organizations covering a broader area than the Comox Valley, but affecting the industry's performance and operation are:

### Associations:

Tourism Association of Vancouver Island	promotion
Hotels, Motels and Restaurants	member services

### Provincial Government Ministries:

Tourism	marketing, training, counseling, development
Labour	training, funding
Economic Development	funding (product development), counseling
Environment and Parks	parks management/marketing
Municipal Affairs	funding, planning, zoning
Provincial Secretary	funding (heritage)
Transportation and Highways	access, signage

### Federal Government:

Employment and Immigration	training, funding
Fisheries and Oceans	fishing regulations, marinas
Regional Industrial Expansion	funding, counseling
Statistics Canada	information
Tourism Canada	marketing/funding

Regardless of the breadth of the fringe organizations, the organizations exercising the most control over the industry are the Comox Valley Chamber of Commerce and Tourism Comox Valley on the private sector side plus the three municipal governments, the regional government and the Islands Trust on the public sector side.

### 5.3 Marketing

Tourism marketing for the Comox Valley is the responsibility of Tourism Comox Valley. Its mandate is to market the Comox Valley externally, or outside the valley.

It is in the process (at the time of writing) of evolving from Ski Comox Valley, an organization charged with marketing skiing. Ski Comox Valley is in its second season as of the 1986-87 ski season, operating with a project budget of \$137,000. Administration, overhead, and salaries were subsidized by a federal government training grant.

The program budget consisted of \$50,000 raised by Mt. Washington, Forbidden Plateau and the hospitality industry, matched dollar for dollar by the provincial government Partners in Tourism Program. An additional \$37,000 was raised by corporate sponsors of selected events and activities.

The proposed budget for Tourism Comox Valley to conduct the non-winter promotions is \$92,000 which includes funding support from the three municipalities, private sector businesses, and the federal government.

The marketing plan for Ski Comox Valley includes a variety of activities. It involved the production and distribution of a 24 panel brochure; a carrier/Ski Comox Valley package; photographs, signage; video update, ski trail maps; ski shows; radio and print advertising; and special events.

The Comox Valley Chamber of Commerce is the key organization providing internal marketing or visitor information throughout the valley. Two other groups providing a similar service within their own geographic areas are the Cumberland Chamber of Commerce and the Union Bay Business Association. These outlets provide information to visitors about local facilities, attractions and events with the Comox Valley Chamber of Commerce open year round and the other two providing seasonal services.

Tourism marketing is also conducted on an individual basis by individual private sector business, particularly accommodation operators, selected restaurants, sports fishing operators and the ski areas. The total marketing effort by these businesses is difficult to estimate, but probably ranges between \$300,000 and \$500,000 annually.

#### 5.4 Community Goals and Attitudes Towards Tourism

Creating a workable tourism strategy requires the endorsement of residents. Understanding and assessing these attitudes is an important prerequisite to designing a tourism strategy which can be effectively implemented. We attempted to determine their attitudes, opinions, aspirations and future expectations through a series of techniques. These included:

- interviews with the three mayors
- interviews with selected municipal administrators
- interviews with selected special interest group representatives
- interviews with tourism industry operators
- public questionnaire distributed through the Free Press and Record newspapers
- special interest group workshop to discuss issues
- public forum to discuss preliminary results and solicit comments
- Official Community Plans of the three municipalities and two islands
- Official Settlement Plan for the Comox Valley.

Since attitudes of residents and goals of the individual communities vary from area to area, we have assessed them separately.

#### Comox Valley

The Comox Valley Official Settlement Plan forms the overall planning and future development framework for the Comox Valley. Although it does not cover the three municipalities, it does set the overall tone and development philosophy for the valley, which is based on a matching of resources and community aspirations. This philosophical assessment forms a key ingredient in the Official Community Plans also.

The overall goals impacting future tourism, which are expected to reflect the wishes of the residents are:\* (edited for brevity)

- retain the rural character
- develop policies in support of the economy
- preserve environmentally significant areas
- provide a range of choices to allow varied lifestyles.

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\* Regional District of Comox-Strathcona, Comox Valley Official Settlement Plan, 1981, p. 4.

Specific references to the tourism/recreation sector which provide a direction or framework for future activities are:

- Tourist-recreation commercial development shall be encouraged to locate throughout the Comox Valley. General dispersal is recommended to help minimize potential impact.
- Expansion or establishment of a tourist-recreational facility should be evaluated on impact on public access, maintenance of local character, traffic flows, and adjacent land use compatibility.
- A specific tourist-commercial zone permitting only accommodation, restaurants, and ancillary retail or personal service use floor space should be used to minimize conflict between rural residents and tourist-related commercial zoning.
- Public acquisition and protection of park areas, particularly beaches and adjoining upland property.

Interpreting this material and the personal input seems to suggest that tourism is to be quietly encouraged because of its ability to create jobs and income, but it will be tolerated only if the environmental impacts and disruption of the local lifestyle is minimal.

#### Courtenay

Courtenay's Official Community Plan specifies a series of goals and policies which impact tourism, reflecting the wishes of council and residents. Selected statements from the plan are as follows:

recognize its environmental and scenic assets  
 maintain existing commercial areas  
 encourage a more clearly defined character to the various  
 commercial sectors  
 maintain a compact and attractive downtown commercial core  
 improve public access to the Courtenay River  
 no new industrial zoning to be permitted on the Comox estuary  
 improve the park and recreation facilities.

The degree to which tourism would be encouraged appears significantly higher for the City of Courtenay than is the case for the rural areas of the valley, partly because it is an existing urban area that requires commerce to survive and partly because an expanded tourism industry will bring new facilities/services that will benefit the residents as well. Examples of the benefits could be additional restaurants, expanded entertainment and recreation, and improved parks or water access.

### Comox

Statements within the Comox Official Community Plan which convey the will of the residents over the long term in connection with tourism are: (summarized)

to maintain a desirable environment which preserved the scenic amenities;

to provide for a diversified and sufficient range of employment and business opportunities commensurate with the locational and scenic attributes;

to provide for the recreation needs of the community and visitors by establishing attractive park and recreations areas;

to permit services and tourist commercial facilities in a few smaller areas rather than concentrating in one location.

The underlying tone of Comox residents appears one of acceptance of tourism as perhaps the most viable and acceptable way to improve the economy and broaden the tax base. This acceptance appears strongly couched in the requirement to respect residential areas, the environment, and the location of proposed future developments.

### Cumberland

Selected comments within the Cumberland Official Community Plan indicate a similar willingness to accommodate tourism growth, although specific references are missing.

- to encourage development of a downtown commercial core area
- to encourage a variety of commercial uses
- to encourage provision of adequate park and recreation facilities.

The conducting and adoption of Cumberland's Economic/Tourism Strategy (completed January 1986) indicates a serious interest in developing tourism in the village. In this sense, Cumberland is the most advanced in its tourism planning and in its commitment to tourism as a viable development strategy.

### Hornby and Denman Islands

Although Denman and Hornby Islands are acknowledged as having significantly different characteristics, they are treated here as a unit because of their similarity as islands. The Official Community Plans for Hornby Island was completed in 1977, and 1978 for Denman. They are both currently being revised.

It is noted that there are actually two kinds of residents on the islands, namely full-time residents and second-home residents having different attitudes. The issues depicted in these plans which illustrate public's attitude and the overall emphasis of the plans are as follows:

- the preservation of a rural environment and atmosphere
- provision of as varied recreational opportunity and experience as the islands are able to offer, now and in the future, including a range of holiday accommodation and facilities
- establishment of a pattern of land use which will allow needed and reasonable development in the present, but which will at the same time preserve land from alienation so that future generations will have the opportunity to make their own choices and decisions
- development of the islands only in ways which are in sympathy with the landscape and which make the most of each site's natural characteristics.
- recognition that the islands are first of all an existing community of people, and the welfare of those people, and those who join them and come after them, must always be a primary concern
- all forms of recreational development shall be of a size and scale which harmonize with the rural environment
- encourage public access to the shore, and other open space while protecting the country and natural environment.



OFFICIAL POLICIES ON TOURISM

<u>AREA</u>	<u>DATE OF PLAN</u>	<u>DEGREE OF TOURISM REFERENCE</u>	<u>DESIRABILITY OF TOURISM</u>
Comox Valley (Rural)	1981	Moderate	Minor to moderate, with strict environmental and lifestyle impact controls
Courtenay	1983	<b>Moderate</b>	Major, with recognition of central service centre role
Comox	1979 & 1985	Minor	<b>Moderate</b>
Cumberland	1985	Minor	<b>Moderate</b>
Hornby/Denman	1977 & 1978	Moderate	Moderate with very specific constraints on the type of tourism that is acceptable.

## 5.5 Tourism Industry Response/Public Participation

During the data gathering stage of this plan, the industry was approached to solicit their input to identify issues and to address their concerns. The delegates were selected because of their involvement in the tourism industry or because they represented a special interest group that impacted tourism. The list included local politicians, hoteliers, restaurateurs, ski area operators, retail merchants, crafts and arts representatives, air carriers, service clubs, plus other special interest group representatives.

The resulting series of round table discussions produced reaction to a series of issues which had been identified in the delegate presentations. The five common issues in the generally agreed order of priority were:

cooperation/parochialism  
 transportation/access  
 tourism development  
 tourism marketing  
 desirability of tourism.

The following is a summary of the results:

### COMOX VALLEY TOURISM STRATEGY

#### PLANNING WORKSHOP

#### SUMMARY OF GROUP DISCUSSION OF ISSUES

#### ISSUE 1. COOPERATION/PAROCIALISM

##### Common Elements:

- Parochialism
  - "long established problem and concern"
  - "better now . . . but still exists"
  - "exists in business and politics"
  - "very detrimental to progressive development"
- Cooperation
  - "expand joint political meetings"
  - focus on "joint group . . . eg. Tourism Comox Valley"
  - "encourage cooperation amongst councils"
  - "one key body" . . . is needed for cooperation
  - "cooperation should be forced"
  - "tourism coordination is important"

##### Other Comments:

- Event scheduling can assist coordination issue.
- Education of Valley residents required (re: tourism).
- An anti-development faction exists.

ISSUE 2. TRANSPORTATIONCommon Elements:

- Air Transport
  - "CFB Comox role is important"
  - "DND cooperation is needed"
- Rail Transport
  - "Scheduling is the issue"
  - "Morning train is needed"
  - "Scheduling is important"
  - "Start train at each end"
  - "Ski train required"
- Marine Transport
  - "Ferry schedules important - Nanaimo-Horseshoe Bay"
  - "Powell River scheduling"
  - "Mainland link is important"
- Road Transport
  - "Highway upgrade is required"
  - "Upgrade needed without by-pass"
  - "Controlled access highway required"

Other Comments:

- Air Transport
  - "Victoria link is needed"
  - "Harbour to harbour connection required"
  - "Increased demand will lead to improved facilities"
- Rail Transport
  - "Event trains could serve as an attraction"
  - "Steam train should be considered"
  - "New equipment is needed"
  - "\*Rail transport (upgrading?) is costly"
- Marine Transport
  - "Lobbying for government docks should take place"
  - "Showers, etc. (services for recreational boaters) are needed"
  - "Circle tour should be promoted"
  - "Cruise ships should be attracted"
- Road Transport
  - "Bus service is important (internal to the Valley)"
  - "Highway development/improvement is a political decision"

ISSUE 3. DEVELOPMENTCommon Elements:

- **RV Park/Campsite a high priority.**
- **Convention/Theatre Complex a high priority.**
- **Waterfront development in Comox important.**

Other Comments:

- Other developments, while being important to one group, were not **listed as priority by** more than one group and included: (. . . no priority ordering . . .)
  - beaches
  - fishing facilities
  - apres ski
  - ski slide

- outdoor recreation
- waterfront park
- winter diving
- launching ramps
- hospitality programs/staff training
- youth hostel
- ski facilities
- Chinatown.

#### ISSUE 4.    MARKETING/PROMOTION OF ATTRACTIONS

##### Common Elements:

- Skiing
- Fishing
- Arts/Culture
- Outdoor recreation
- Events
- Coordinated marketing (eg. Tourism Comox Valley)
- Four Season/All season promotion.

##### Other Comments:

- Other attractions that should be marketed mentioned by one group include: (... no priority ordering . ..)
  - natural beauty .
  - retirement advantages
  - all Valley areas as vacation area
  - the Valley's "livability"
  - opportunity (tourism) in the Valley
  - the destination status of the Valley.
- Other comments aimed at increasing marketing/promotion effectiveness mentioned by one group each include: (... no priority ordering . ..)
  - encourage local (internal) tourism
  - offer packages to Vancouver market
  - seek out new markets
  - establish target markets
  - prepare/distribute maps and event calendar
  - solicit financial input from B.C. Government
  - establish/promote a Valley theme
  - prepare videos and use a promotional device
  - encourage community involvement

#### ISSUE 5.    DESIRABILITY OF TOURISM

##### Common Elements:

- Double existing tourism activity indicated as acceptable.
- Nature oriented/outdoor tourism a desirable focus of tourism expansion.

##### Other Comments:

- Sports oriented tourism.
- Family oriented tourism development.
- Controlled/low profile tourism development.

A second method used to record responses to a series of questions on tourism development was a questionnaire, administered as a personal interview or self-administered. (See Appendix A.) It was designed to provide responses to a set of general tourism development questions both in the respondents' home community and in the Comox Valley. The topics addressed included:

- area's strengths
- area's weaknesses
- tourism issues
- market trend changes
- tourism development opportunities
- seasonality opportunities
- issue/facility ranking
- other comments

A similar but somewhat abbreviated version of this questionnaire was made available to record public response through newspapers (Comox District Free Press and the Courtenay Comox Valley Record).

Response rates to the Industry Questionnaire were good since they were conducted through a personal interview or were left with the respondent. Approximately 50 were completed. Response to the much more widely distributed public questionnaire was poor as only 37 were completed.

Responses to the questions with suitable response rates are tabulated below:

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<u>QUESTION</u>	<u>RESPONSES</u>	<u>INDUSTRY RESPONSE</u>	<u>PUBLIC RESPONSE</u>
1. What do you feel are tourism's main strengths in the Comox Valley?	Fishing/Boating	13	20
	Scenery	5	16
	Skiing	11	18
	Arts/Culture	13	6
	Outdoor Activities	20	14
	Hiking	5	
	Four Season Destination		11
2. What are the main weakness or problem areas ?	Advertising	8	9
	Access	12	13
	Marinas	3	2
	Signage	3	6
	Campgrounds	3	7
	Local governments	6	9
	Cultural facilities	4	2
3. What are the main development opportunities?	Waterfront development	3	3
	Cultural/ent. facilities	10	4
	Fishing/Boating	9	12
	Skiing	3	3
	R.V. Park	2	13
	Transportation	5	3
	Promotion	2	6
4. Perception of how the Comox Valley currently ranks on a variety of tourism issues. (Scale is from 1 to 5 with 5 being the highest, 1 the lowest).	Variety of Accommodation	3.3	3.4
	Quality of Accommodation	3.1	3.4
	Scenic Appeal	4.9	4.8
	Man-Made Attractions	2.3	2.4
	Level of Hospitality	3.1	3.3
	Direction Signage	2.6	1.9
	Highway Access	3.0	2.4
	Variety of Restaurants	4.1	4.6
	Tourism Marketing	2.7	2.0
	Tourism Industry Organization	2.7	NA
	Variety of Activities	4.3	3.7
	Beaches	3.5	NA
	Air Access	3.9	NA
	Shopping	3.1	NA
Waterfront Development	2.5	NA	

Note:

Numbers in questions 1-3 represent actual number of responses to each question. Numbers in question 4 are the arithmetic average.

### 5.6 Tourism Outlook\*

What is the future likely to hold for the Comox Valley's travel industry? Although this question is impossible to answer with certainty, the tourism industry, like most sectors of the economy, is experiencing a technological revolution and is certain to face significant changes throughout the remainder of the 1980's. What is uncertain is how significant these changes might be. Some forecasters suggest that the changes over the 1980's will be as significant as those faced during the past fifty years. Others suggest that the recent economic downturn will tend to dampen radical changes and the period will be characterized by a series of small changes.

Regardless, the travel industry is a "people" business and this orientation will remain a universal characteristic. It is people oriented both in terms of its product (providing goods and services to travelers), and its operation (relatively **labour** intensive). By its very nature, it will remain people oriented and therefore may not participate in the high technology revolution to the same degree as other sectors of the economy.

A recent case-in-point illustrates tourism's situation. Prior to the recession of 1981-1984, tourism was generally thought to be recession proof or at least recession resistant. The severity and length of the economic downturn proved this notion wrong as substantial cut-backs were made in business and pleasure travel.

On the positive side, however, the recession has caused the travel industry to operate more efficiently and to be more aggressive. It has also helped to unite the travel industry as a more recognizable and identifiable component of the economy.

The composition of travel and tourism over the next ten years will undoubtedly be shaped by the economic and social trends which are currently emerging. Although there is a diversity of opinions regarding the significance of current trends and the outlook for the industry, the following points are thought to represent reasonable assumptions regarding tourism's future.

#### Population Shifts

- Increasing trend to urbanization.
- North American population continues to age and by 1990, nearly one-half will be in the traditionally high travel years of 25-40.
- Number of teenagers should decline to 1990 while those over 65 years of age will increase.
- Number of children should increase as post war baby boom people have families of their own.

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\* Travel Industry Association of B.C., Travel Industry Norms, prepared by the Economic Planning Group, 1986, p. 12.

### Family Composition

- Decrease or stabilization in the proportion of family (with children) households. (Currently about 25% of total households .)
- Increase in single person households. (Currently 20% of all households.)
- Number of children per family to continue to decline or stabilize at 1.5 to 1.7.
- Increasing number of two more more wage earner households.
- Continued "blurring of the sexes" in terms of domestic and business roles.

### Travel Changes

- Continued concern for health and fitness.
- Continued concern for the environment and the outdoors experience.
- Increasing interest in heritage and culture.
- Increased emphasis on market specialization, i.e. family, women, corporate, etc.
- Increase in the number of short duration trips for long weekends and mid-week periods.
- Decrease in the overall significance of the traditional summer vacation.
- Continuation of the summer "school holiday" period of focus for family trips.
- Expansion of working holidays, combination business/pleasure trips, sports oriented holidays, and trips for educational purposes.
- Stabilization of automobile travel and the preferred mode for two-thirds of all trips.
- Length of trips to continue decrease while frequency to increase.
- Travelers to become increasingly sophisticated about the range of travel products.
- Continued price sensitivity for all travel products and services.
- Increased use of price discounting as a marketing technique.
- Increased impact of currency exchange rates in destination selection.
- Increasing travel by seniors, and increasing importance of this group as a travel market.
- Value for money to continue importance, but increase likely in the sophisticated-market category.



### Facility Development Trends

- Increasing move toward full-service facilities where accommodation, food, recreation and entertainment are contained in one location.
- Increasing concern for energy efficiency, security, safety (fire) and comfort.
- Increasing financial participation in tourism at the municipal, regional, provincial and federal levels of government.
- Increasing equity participation in tourism facilities by financial institutions.
- Increasing emphasis on facility design.
- Increase in the number and variety of commercial attractions to augment the traditional scenic appeal of British Columbia.
- Increase in bed and breakfast operations.
- Increase in franchising as a development vehicle.
- Increasing conversion of older tourism facilities to accommodate . markets of the 1980's and 1990's.
- Increasing emphasis on development of events and attractions as travel generators.
- Increasing involvement of local governments and special interest groups in tourism development planning.

### 5.7 Competition

**Competition for the tourist's dollar is becoming increasingly more competitive. This is the case for all tourism destinations worldwide as increasing numbers of areas recognize the potential of tourism to generate income and create jobs.**

To destinations on Vancouver Island, the problem has two elements. The first **is** a requirement to cooperate the promotional efforts to entice visitors to the island and to keep residents on the island. The second issue is for the individual jurisdictions to compete against one another for these visitors.

For the **Comox Valley**, the two main competing areas are **Parksville/Qualicum** to the south and **Campbell River** to the north. Although these areas (and the **Comox Valley**) offer a variety of tourist features they have a **number of similarities. They all:**

- have about the same number of hotels , motels and campgrounds
- are approximately the same size and population
- cater in large part to the automobile or R.V. traveller
- rely on salmon fishing as a major draw
- cater to the family and retired market
- provide facilities for small to medium sized conventions
- have relatively large cultural/arts communities
- have beach oriented recreation
- have attractive scenery and natural resources
- have similar climates and weather.

Parksville-Qualicum is perhaps less advanced or organized in its tourism promotion than Comox Valley or Campbell River although interest has been expressed becoming more aggressive. The volume of tourism is not known, although enquiries at the Visitors Information Centre average just over 20,000 per year.

Campbell River initiated its Tourism Promotion Society three years ago as an offshoot of the Chamber of Commerce, to specifically market Campbell River as a visitor destination. The Society is funded jointly by the city and memberships and has tapped Partners in Tourism funds from the provincial government. The target markets are fishermen and conventions/meetings.

## 5.8 Conclusions

- Travel industry facilities in the **Comox** Valley operate to various levels of capacity with the common element that it is operating significantly below potential.
- **Accommodation occupancies are under 50% annually, considerably below the Vancouver Island and provincial average. The lodge/cottage markets are highly seasonal with high utilization in the school holiday period and virtually nothing throughout the rest of the year.**
- The campground sector is also highly seasonal with peak season occupancies in the 85%-95% range and annual occupancies of less than 20%. The food service sector operates at under 50% of capacity and the ski industry about 25%. Patronizing of events is good while attraction usage is low.
- The main agencies providing services to the travel industry in the Valley are the **Comox** Valley Chamber of Commerce and Tourism **Comox** Valley. The former provides information services, the latter external promotion.
- **Marketing is currently conducted through Ski/Tourism Comox Valley with good support by the private-sector for the ski season and somewhat less support for the other seasons. The larger properties also conduct their own marketing programs independently and with other industry participants such as airlines.**
- Although there are notable regional differences in the public acceptance of tourism, the common reaction is that it is to be encouraged. The results of our research indicated a favorable disposition within the confines of resource carrying capacity, congestion, maintaining the environmental quality, lifestyle, and scale of development.
- **From the perspective of representation of the travel industry, the key issues impacting future tourism development are: cooperation/parochialism, transportation/access, facility development, marketing and the level of acceptable tourism.**
- **Tourism's future will be shaped by a number of uncontrollable outside factors and trends. The most significant include population shifts, family composition, travel performance changes and facility development trends.**
- The competing areas to the north (Campbell River) and south (**Parksville/Qualicum**) have and will affect tourism in the **Comox** Valley. Since the physical resources and built amenities are quite similar in all three areas, the amount and success of marketing efforts will be critical.

## 6.0 THE CHALLENGE

An understanding of the resources, visitor characteristics, local preferences and tourism industry operation has been provided in the preceding chapters. The challenge is to combine existing resources and energies in an effective manner which capitalizes on both existing and future **opportunities and markets**. If this is done in a manner which is consistent with local and regional objectives and aspirations, the tourism industry in the Valley can develop in harmony with the other social and economic objectives.

Upon analysis of the resource and market information, and particularly after including resident aspirations and knowledge of **jurisdictional** requirements, it became apparent that a single tourism strategy for the **Comox** Valley would not be practical. This occurs partially because of the diversity of resources and markets, but mainly because of the role local jurisdictions are likely to have in implementing the strategy.

Consequently, we have prepared a separate analysis of five separate geographic sub-regions. These are:

- Town of **Comox**
- City of Courtenay
- Village of **Cumberland**
- Denman** and Hornby Islands
- Rural Areas

In this section we discuss the resources, the opportunities and the constraints to improving tourism in each of these five geographic areas. To assist the reader, we have tabulated the summaries of these assessments in a series of exhibits.

Prior to the analysis of the five sets of opportunities and constraints, a ranking of resources and markets has been prepared. This was undertaken to consolidate all the subjective assessments described in earlier chapters, into a concise, summary analysis.

### 6.1 Resource and Activity Ranking

In order to provide a more concise analysis of the significance and relative importance of Comox Valley tourism resources and activities, we have developed a ranking procedure. Although imprecise, due to the requirement of describing subjective information with a number, the process is useful in establishing the relative differences among various resources and activities.

Ranking procedures have been conducted using a list of resources, activities and opportunities. The list of issues included:

- natural resources
- water-based recreation
- land-based recreation
- developed tourism resources
- heritage resources  
  events/attractions
- economic and community issues.

Against these categories, two separate ranking procedures were undertaken to produce a "picture" of Comox Valley tourism resources and possible opportunities. One assessed the significance of these tourism resources and activities against the three geographic regions of:

- urban (Courtenay, Comox and Cumberland)
- rural (all other areas within the study area)
- Comox Valley (combination of both urban and rural)

The rankings reflect the overall significance and existing market for each activity or resource.

The second ranking attempts to refine the resources, activities and opportunities against six separate criteria, namely:

- resource/facility significance
- resource/facility carrying capacity
- existing markets
- market potential
- desired markets
- ease of implementation

In both cases the ranking has been conducted on a relatively crude 0 to 3 scale. The general explanation of the rankings is as follows:

- 3 - high value and/or quality
- 2 - moderate value and/or quality
- 1 - low value and/or quality
- 0 - negligible value and/or quality

The reader is cautioned that this ranking process should be interpreted carefully, since quantifying subjective information is imprecise and rankings can differ depending on the reader's perspective or interest in a particular issue. Nevertheless, the process does serve a very useful purpose in summarizing a great deal of information into a few pages and also in supplying relative rankings between otherwise unrelated resources or activities.

Assessing the grouping of issues illustrates the relative strengths and weaknesses of the Comox Valley's tourism resources and activities. The NATURAL RESOURCE AND ACTIVITY RANKING Exhibit illustrates that the Comox Valley ranks particularly high in terms of landscape resources and also high in terms of climate.

Water-based recreation opportunities of high significance are salt-water fishing, boating, swimming and scuba diving. Ranking moderately high are fresh-water activities, and windsurfing. Land-based recreation activities ranking high are alpine skiing, camping, hiking and sightseeing. Other land-based activities having a relatively high value are cross-country skiing, hunting, cycling, equestrian activities, snowmobiling and second home development.

Historic aspects having particular relevance in the area are resource development (notably coal and-lumber) and maritime activities. Ranking slightly lower are native indian themes and pioneer settlement.

The PHYSICAL RESOURCE AND ACTIVITY Exhibit illustrates relatively high rankings for parks (provincial and regional), events/festivals and access corridors. Specific resources or facilities ranking high are wilderness parks, skiing facilities, performing arts, crafts, festivals and sporting events. Activities ranking moderately high are marine parks, hotels, motels, campgrounds, all access corridors, boating facilities, golf courses, museums, shopping opportunities and community celebrations. By comparison, the facilities or activities ranking low were regional parks, lodges, all types of resorts, convention facilities, architecture and engineering structures.

In terms of the HUMAN AND ECONOMIC RESOURCES a different set of rankings result. The economic base of the Comox Valley is diversified, while unemployment, particularly seasonal unemployment, is prevalent. The importance of lifestyles is illustrated by high ranking of lifestyle issues, in both the urban and rural areas. Generally, the attitudes towards tourism are positive, with relatively solid support for tourism being expressed by the public and the municipalities/regional district.

NATURAL RESOURCE AND ACTIVITY RANKING

	URBAN	RURAL	COMOX VALLEY
<b>● LANDSCAPE AESTHETICS</b>			
. Natural beauty and diversity	2	3	3
. Variety of land use patterns	2	3	3
. Beaches	1	3	3
<b>● CLIMATE</b>			
. Favourable Summer season	3	3	3
. Favorable Winter season	2	3	2
. Favorable Shoulder season	2	1	2
<b>● WATER-BASED RECREATION</b>			
. Boating/Sailing - fresh-water	0	2	2
. - salt-water	0	3	3
. River Rafting/Tubing	2	2	2
. Swimming - fresh-water	2	2	2
. - salt-water	2	3	3
. Scuba Diving	1	3	3
. Windsurfing	1	2	2
. Canoeing/Kayaking - fresh-water	0	2	2
. - salt-water	0	3	3
. Fishing - fresh-water	0	2	2
. - salt-water	0	3	3
<b>● LAND-BASED RECREATION</b>			
. Skiing - alpine	0	3	3
. - helicopter	0	1	1
. - cross country	0	2	2
. Hunting - big game	0	2	2
. - upland game	0	2	2
. - waterfowl	0	2	2
. Camping - auto touring	2	3	3
. - back country	0	3	3
. Hiking - day trips	0	3	3
. - overnight	0	2	2
. Mountain climbing	0	2	1
. Cycling	1	2	2
. Sightseeing	2	3	3
. Equestrian Activities	1	2	2
. Snowmobiling	1	2	2
. Second Homes	1	3	2
<b>● HISTORIC THEMES AND PERIODS</b>			
. Native Indian	2	2	2
. Exploration/fur trade	1	2	1
. Gold rush	0	1	0
. Pioneer settlement	3	2	3
. Resource development	3	3	3
. Maritime	2	3	3

Ranking Evaluation 3 - High value and/or quality  
 2 - Moderate value and/or quality  
 1 - Low value and/or quality  
 0 - Negligible or absent

PHYSICAL RESOURCE AND ACTIVITY RANKING

	URBAN	RURAL	COMOX VALLEY
<b>● <u>PARKS</u></b>			
. National	0	0	0
. Provincial - recreation	0	2	2
. Provincial - wilderness	0	3	3
. Marine	0	2	2
. Regional/Local	2	1	1
<b>● <u>ACCOMMODATION</u></b>			
. Hotels	2	0	2
. Motels	2	1	2
. Lodges/Cabins	0	2	1
. Resorts	1	1	1
. Campgrounds	1	2	2
<b>● <u>ACCESS/TOURING CORRIDORS</u></b>			
. Air	2	1	2
. Rail	2	2	2
. Boat/Ferry	2	1	2
. Road	2	2	2
<b>● <u>LEISURE RESORTS/COMPLEXES</u></b>			
. Convention facilities	1	0	1
. Water-based resorts	0	1	1
. Marina/boating facilities	1	2	2
. Ski resorts	0	3	3
. Four season resorts	0	0	0
. Theme Parks	0	0	0
. Golf Courses	2	2	2
. Guest ranches/resorts	0	1	1
. Hunt and Fish camps	0	1	1
. Zoos/gardens	0	0	0
. Arboretums/game farm	0	0	0
<b>● <u>MAN MADE ATTRACTIONS</u></b>			
. Museums	2	0	2
. Theatres/performing arts	3	3	3
. Crafts	2	3	3
. Architecture	1	1	1
. Shopping/restaurants	2	2	2
. Amusements/attractions	0	0	0
. Engineering structures (dams,etc.)	1	2	1
<b>● <u>POPULAR EVENTS</u></b>			
. Community celebrations	2	2	2
. Special festivals/events	3	3	3
. Summer sporting event	3	1	3
. Winter sporting event	1	3	3

tanking Explanation 3 - High value and/or quality  
2 - Moderate value and/or quality  
1 - Low value and/or quality  
0 - Negligible or absent



HUMAN AND ECONOMIC RESOURCE RANKING

	URBAN	RURAL	COMOX VALLEY
<b>● ECONOMIC BASE</b>			
. Fish harvesting/processing	0	2	2
. Timber harvesting/processing	2	2	2
. Mineral extraction/processing	0	1	1
. Ranching	0	1	1
. Farming	0	3	3
. Orchards, vineyards, wineries	0	1	1
. Tourism	2	2	2
. Business/Government services	2	1	2
. Manufacturing	1	1	1
. Industrial Service	1	1	1
<b>● DEMOGRAPHIC TRENDS AND MANPOWER</b>			
. Growing population	2	2	2
. High income	1	1	1
. Established tourism labour force	2	1	2
. Available labour pool	2	2	2
. Training Facilities	2	1	2
. Entrepreneurial capability	2	2	2
. Seasonal unemployment	3	3	3
. High unemployment	3	3	3
<b>● LIFESTYLES</b>			
. Variety of lifestyles	2	3	3
. Special ethnic/cultural groups	2	3	3
. Urban/industrial	2	1	2
. Pastoral/rural	1	3	3
. Independence valued	3	3	3
. Existing tourism operation	2	2	2
<b>● TOURISM ATTITUDES</b>			
. Appreciation of economic value	2	2	2
. Tolerance to increased tourism	2	2	2
. Public desire for tourism	2	2	2
. Political support for tourism	3	2	3
. Implementation/organizational capability	3	2	2

Ranking Explanation 3 - High value and/or quality  
2 - Moderate value and/or quality  
1 - Low value and/or quality  
0 - Negligible or absent

Our second ranking exercise produced a generally similar set of ranking totals even though this technique reviewed aspects of the individual resources and their markets. Again the reader is cautioned that these rankings are not infallible and different rankers could conceivably come up with different ranks. However, as with the preceding exhibit, this process does provide an element of comparison and clarity not possible with only subjective rankings.

In terms of water-based activities, those ranking highest when considering the resource itself plus market assessments in generally descending order are: salt-water fishing and boating, scuba diving, salt-water swimming, windsurfing and fresh-water fishing. (See RESOURCE AND MARKET RANKINGS exhibit.)

A series of land based recreation activities and/or opportunities also scored high. Again in generally descending order of priority the activities are: downhill skiing, automobile camping, day trip hiking, rural sightseeing, equestrian activities, cycle touring and cross-country skiing.

The review of leisure resorts/facilities as a category has generally lower scores indicating the facilities either don't exist or are not particularly significant and the markets are smaller. Although some overlapping occurs between the section on activities and facilities, the facilities ranking highest are: ski resorts, marina facilities, golf course(s) and convention facility.

Man made attractions cover the spectrum from high to low rankings although the list is relatively short. Those categories of man made attractions ranking highest are: crafts, theatre, performing arts, shopping and restaurants.

Events on the other hand, tend to rank relatively higher in terms of their existing significance and their market potential. This holds true for community celebrations, special events and sporting events.

## EXHIBIT 6.4

## RESOURCE AND MARKET RANKINGS

	RESOURCE SIGNIFICANCE	RESOURCE CARRYING CAPACITY	EXISTING MARKET	MARKET POTENTIAL	DESIRE <sup>2</sup> MARKET	EASE OF IMPL <sup>2</sup> MENTATION	TOTAL RANKIN <sup>F</sup>
<b>WATER-BASED RECREATION OPPORTUNITIES</b>							
. Boating/Sailing - fresh-water	2	2	1	2	2	1	10
. Boating/Sailing - salt-water	3	3	2	3	3	2	16
. River Rafting/Tubing	1	1	1	2	2	2	9
. Swimming - fresh-water	1	2	1	2	2	1	9
. Swimming - salt-water	2	3	1	3	3	2	14
. Scuba Diving	3	3	1	3	3	2	15
. Windsurfing	2	3	1	2	2	2	12
. Canoeing/Kayaking - fresh-water	1	2	1	1	2	1	8
. Canoeing/Kayaking - salt-water	2	2	1	2	2	1	10
. Fishing - fresh-water	2	2	2	2	2	2	12
. Fishing - salt-water	3	3	2	3	3	2	16
<b>LAND-BASED RECREATION OPPORTUNITIES</b>							
. Skiing - alpine	3	3	3	3	3	2	17
. Skiing - heli/snow-cat	2	2	1	2	2	2	11
. Skiing - cross country	2	2	2	3	3	2	14
. Hunting - big game	2	2	2	1	1	1	9
. Hunting - upland game	2	2	2	1	1	1	9
. Hunting - waterfowl	2	2	1	1	1	1	8
. Camping - auto touring	3	3	2	3	3	2	16
. Camping - back country	3	3	1	2	2	2	13
. Hiking - day trips	3	3	1	3	3	3	16
. Hiking - overnight	3	2	1	2	2	2	12
. Mountain Climbing	2	2	1	1	2	1	9
. Cycle Touring	2	2	1	3	3	3	14
. Auto Racing	2	2	2	3	2	2	13
. Equestrian Activities	2	3	2	3	3	1	14
. Snowmobiling	2	2	1	2	1	1	9
. Second Homes Development	1	2	2	2	2	1	10
. Urban Sightseeing	2	3	1	3	3	1	13
. Rural Sightseeing	3	3	2	3	3	2	16
<b>LEISURE RESORTS/FACILITIES</b>							
. Convention facilities	1	1	2	3	3	1	11
. Water-based resorts	1	1	1	3	3	1	10
. Marina/boating facilities	2	2	3	3	3	1	14
. Ski resorts	3	3	3	2	3	2	16
. Four season resorts	0	0	0	2	2	1	5
. Theme parks	0	0	0	2	1	1	4
. Golf courses	2	2	2	3	3	1	13
. Guest ranches/resorts	1	1	1	2	2	2	9
. Hunt and fish camps	0	0	0	1	2	1	4
. Gardens/arboretum	1	1	1	2	2	1	8
. Zoos/fame farm	0	0	0	1	1	1	3
<b>MAN MADE ATTRACTIONS</b>							
. Museums	2	2	2	2	2	2	12
. Theatres/performing arts	3	1	2	3	3	1	13
. Crafts	3	3	2	3	3	2	16
. Architecture	2	1	1	1	1	1	7
. Shopping/restaurants	2	2	2	2	3	2	13
. Amusements/attractions	1	1	0	3	2	2	7
. Engineering structures (dams,etc.)	1	1	1	2	3	3	11
<b>POPULAR EVENTS</b>							
. Community celebrations	3	3	2	3	3	2	16
. Special festivals/events	3	3	2	3	3	2	16
. Summer sporting event	2	3	2	2	2	2	13
. Winter sporting event	2	3	2	2	2	2	13

**Ranking Explanation** 3 - High value and/or quality  
2 - Moderate value and/or quality  
1 - Low value and/or quality  
0 - Negligible or absent

RANKING PARAMETERS

**Resource Significance:** Measures the resource importance, i.e. uniqueness or attractiveness.

- 3 = provincial, national or international significance
- 2 = regional significance
- 1 = local significance
- 0 = no significance

**Resource Carrying Capacity:** Measures the ability of the resource/facility to sustain increased use without significantly detracting from the resource's appeal.

- 3 = excellent capacity or resilience
- 2 = moderate capacity
- 1 = low capacity
- 0 = no capacity for development or expansion

**Existing Market:** Measures the relative current market demand.

- 3 = excellent or heavy market appeal
- 2 = moderate market appeal
- 1 = low market appeal
- 0 = no or negligible market appeal

**Potential Market:** Measures the future outlook and relative likelihood of expanding the market appeal.

- 3 = excellent potential to expand the market
- 2 = moderate market expansion potential
- 1 = low market expansion potential
- 0 = no or negligible market potential

**Desired Market:** Measures the degree to which the market meet local objectives, and the range of conflicts produced.

- 3 = strong desire to develop or expand market
- 2 = moderate desire to develop or expand market
- 1 = low desire to develop or expand market
- 0 = no or negligible desire to develop or expand market

**Ease of Implementation:** Measures the relative ease of developing considering resource conflicts, regulations, community support etc.

- 3 = Very easily initiated
- 2 = done with moderate effort or difficulty
- 1 = Difficult to implement
- 0 = Very difficult to implement

## 6.2 COMOX OPPORTUNITIES AND CONSTRAINTS

The Town of **Comox** and environs is situated in a very scenic location, close to air, marine and water access routes. This waterfront location, proximity to traffic arteries, and scenic appeal present a series of tourism development opportunities for the community.

In the following paragraphs we describe a number of these tourism development issues and relate the significance of the issue, the opportunities presented and the development constraints. The specific opportunities and constraints are listed in Exhibit 6.6.

### Waterfront Development:

**Comox has a very attractive waterfront consisting of three wharf developments, associated parking and a very attractive municipal park, located only one block off the main street. Public access is good and visibility from the downtown area is also good. Also, the harbour front has not been alienated by any industrial or public utility uses, increasing its attractiveness and accessibility.**

Furthermore, there is an opportunity to link the downtown area and the **harbour front with a marine theme. There is also an opportunity to generate an increased amount of marine-commercial retail and service businesses based on marine tourism and the attraction of the upland amenities.**

### Downtown Area:

**Comox has a compact commercial core located just off the harbour. Its orientation is all towards the business section, with the harbour in the background. A great opportunity exists to integrate the business core through a focus towards the water. This would include marine oriented retail and tourist commercial development forming an access link down the slope towards the water.**

### Signage/Theme:

**Comox is not on the main traffic routes and does not experience much in the way of pass-through tourist traffic. Interpretive and/or directional signage outside of the community at key intersections is minimal. Due to the strong water orientation, a marine theme would allow a common focus to signage and future developments.**

### Military Facilities:

**Comox is unique in British Columbia and possibly in Canada, in having two military installations in its immediate area - one airforce and one navy. However, due to security, the two facilities are virtually not accessible to the civilian public. Since they are both located on prime waterfront locations, lack of access is a concern.**

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Both facilities are responsible for generating a considerable amount of "military tourism", however, with the influx of cadets at HMCS Comox and various training courses/programs at CFB Comox.

Another tourism opportunity at CFB Comox is the proposed military terminal expansion and the possibility of constructing a joint military/DOT airport.

Marketing:

Since the local tourism industry is performing below B.C. averages and well below capacity, a key opportunity is to market the area's existing features more aggressively. This could be done with visitors already in the Valley or as part of joint promotions to entice people to the Valley.

Native Indian Tourism:

The local indian bands possess an interesting heritage and strategically located reserve land. If tourism fits into the bands' economic development objectives, some accommodation, entertainment and education/training development opportunities exist.

Costs would be incurred in developing the land, but revenue sources and employment would be created. In the case of Goose Spit, access to I.R. No. 3 needs to be resolved.

## COMOX OPPORTUNITIES

ISSUE/ACTIVITY	RESOURCES
WATERFRONT DEVELOPMENT	<ul style="list-style-type: none"> <li>. Scenic location</li> <li>. No competing industrial development</li> <li>. Easy road/water access</li> <li>. Close proximity to downtown</li> <li>. Good base of public facilities</li> </ul>
DOWNTOWN DEVELOPMENT	<ul style="list-style-type: none"> <li>. Compact, attractive downtown area</li> <li>. Close proximity to harbour</li> <li>. Good road access</li> </ul>
SIGNAGE/THEMES	<ul style="list-style-type: none"> <li>. Maritime location</li> <li>. Don't have to undo any other themes</li> </ul>
MILITARY FACILITIES	<ul style="list-style-type: none"> <li>. CFB Comox</li> <li>. HMCS Quadra</li> </ul>
MARKETING	<ul style="list-style-type: none"> <li>. Very appealing community to market</li> </ul>
NATIVE INDIAN TOURISM	<ul style="list-style-type: none"> <li>. Reserve lands</li> <li>. Unique heritage</li> </ul>

### 6.3 COURTENAY OPPORTUNITIES AND CONSTRAINTS

The City of Courtenay is the geographic center of the coastal plane which comprises the Comox Valley floor. Courtenay contains about one-quarter of the Valley's population and the majority of hotels, motels and food service operations in the study area. With the exception of the two ski areas and the marine tourism facilities, the majority of the Valley's tourism activity takes place in Courtenay and the surrounding area.

The City possesses a considerable range of assets and resources upon which to base future tourism growth. These are created by Courtenay's strategic highway location, its river and ocean frontage, its land resources and its downtown development. A series of constraints to enhancing the city's tourism development also exist, however, most of which have to do with development costs and competing land use possibilities.

In the following paragraphs we have outlined the key tourism resources. These comments are followed by a listing of specific development opportunities and constraints in Exhibit 6.7.

#### Waterfront Development:

Although Courtenay is situated on the ocean (Comox estuary and three rivers), its orientation is almost entirely non-marine. Courtenay has over a kilometre of shoreline on the Comox Harbour and several kilometres of river frontage. With few exceptions, all development is oriented away from the water.

Courtenay possesses three very unique waterfront undeveloped land resources, each one having significant tourism potential. Perhaps the most unique is the Comox Logging Railway right-of-way running about six kilometres along the west shore of Comox Harbour from the center of Courtenay to Royston. Its potential as a walkway/bikeway/linear park is unsurpassed as a means to provide public water access.

Almost as unique is the property bounded by the Courtenay River and the Courtenay River Slough, referred to as the Inkster property. This undeveloped, flat land is almost in the center of the city and is bordered by water on three sides. The third property offering significant tourist development potential is the old sewage lagoon by the municipal air park.

#### Festivals and Events:

Courtenay hosts a number of relatively large community, sports and special interest events. As tourism developments, events are particularly significant because of their limited capital cost and their broad market appeal. Courtenay's proven track record in staging these events is an asset.



Downtown Revitalization:

Urban settings are important resident and tourist assets. They provide the retail goods and services required by both groups, and if developed tastefully (and around a theme), provide an attraction and a revenue centre. Courtenay's initial phase of streetscape enhancements on 5th Street is an excellent start towards beautifying the main business core.

Equestrian Activities:

Horse related activities currently take place at the regional district owned exhibition grounds just north of Courtenay. The facility provides the basic requirements, but is not elaborate. The Bear Creek Ranch located farther north has an indoor riding ring and appears to serve a fairly large equestrian market of mainly local residents.

Native Indian Sites:

The Comox band has a reserve (I.R. No. 2) located just north of the Puntledge River, at the confluence of the Tsolum River. Its considerable river frontage, proximity to Courtenay and ready access make it a desirable tourism oriented property.

Other Developments:

A series of other development opportunities exist, to enhance the city and improve the tourism sector. The most critical is a family oriented entertainment or amusement facility. It would likely be warm weather oriented and cater to both existing Valley visitors and pass-through tourists. Other developments having potential are an R.V. Park close to the downtown area and the train station.

Arts and Culture:

Courtenay (and the Comox Valley) has an abundance of crafts people, artists and theatrical performers. Courtenay as the Valley's largest community and its central location, make it the logical choice for an arts centre facility. The ability of the area to entice top name entertainers and consequently, increase attendance by tourists would also be increased.

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COURTENAY OPPORTUNITIES

ISSUE/ACTIVITY	RESOURCE
RIVER FRONT LOCATION	<ul style="list-style-type: none"> <li>. Courtenay River</li> <li>. Tsolum and Puntledge River</li> <li>. Comox Estuary</li> </ul>
ARTS/CULTURE CENTRE	<ul style="list-style-type: none"> <li>. Number of people in the visual and performing arts</li> </ul>
FESTIVALS AND EVENTS	<ul style="list-style-type: none"> <li>. Good existing base of events</li> <li>. Proven demand</li> </ul>
DOWNTOWN REVITALIZATION	<ul style="list-style-type: none"> <li>. Partially revamped downtown area</li> <li>. Reasonably compact downtown area</li> </ul>
EQUESTRIAN ACTIVITIES	<ul style="list-style-type: none"> <li>. Existing fairground</li> <li>. Bear Creek Ranch</li> <li>. Agricultural heritage</li> </ul>
NATIVE INDIAN LAND	<p>Strategically located undeveloped land adjacent to Courtenay (on two sides)</p>



#### 6.4 CUMBERLAND OPPORTUNITIES AND CONSTRAINTS

The Village of Cumberland and the area immediately surrounding the community possess resources which have appeal to tourists, yet in the past, visitor interest has been minimal. The possibility exists to take further advantage of these attractions and to increase the economic value of tourism in the immediate area. However, constraints to tourism development also exist which must be addressed if the community is to succeed in expanding the economic sector.

The following paragraphs describe key tourism resources and tourist amenities in and around Cumberland. The specific opportunities and constraints are tabulated in Exhibit 6.8.

##### Coal Mining Heritage:

Cumberland boasts a unique and interesting heritage having been an important coal mining centre early in this century. The Chinese people played an important role in this industry and a number of reminders of life in the coal mining days are still evident. History in general has become important to many tourists over the past decade as statistics demonstrate a broadly based market for heritage and a growing interest in the educational importance of vacations. An opportunity exists in Cumberland to take advantage of this growing awareness of history by developing the coal mining heritage.

##### Downtown Area:

The central core of many towns and cities provide important opportunities for tourism and valuable economic benefits to the communities involved. By combining tourist amenities and services with physical attractions and activities downtown areas can become the focus for tourism activity, especially in smaller communities.

The downtown area of Cumberland is unique and compact, and is a resource that can be capitalized on with careful planning and development. Combining downtown area development with Cumberland's heritage could lead to an appealing and economically valuable asset.

##### Events and Activities:

Tourists are attracted not only by physical attractions and amenities, but also to experience, enjoy and participate in special activities and events. Cumberland currently holds Lake Days on Comox Lake in July and Empire Days in the downtown area in May. An oppor

Accommodation:

There are no tourist oriented hotel or motel facilities in Cumberland. This situation presents both opportunities and constraints to future accommodation development. On the positive side, no competition exists, while on the negative side, there is little in the way of existing demand.

Comox Lake Waterfront Development:

We consider Comox Lake to be a significant but underutilized tourism asset in the Cumberland area. Expansion of tourism activity at the lake will lead to direct spin-off benefits in the downtown area since Cumberland is directly on the access road to the lake.

While development opportunities appear to exist, waterfront development also faces a number of constraints which need to be overcome. These constraints include the private land ownership access, development costs and cold water temperature.

Signage:

Directional, informative, and interpretive signage which is well conceived and effectively implemented can be beneficial in attracting tourists to an area and in enhancing the enjoyment of their visit once there. Due to its location off the main tourist access road and its relatively undeveloped tourist industry, a variety of signage opportunities exist in Cumberland which could assist in tourist industry development.

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CUMBERLAND RESOURCES/OPPORTUNITIES

ISSUE/ACTIVITY	RESOURCES	
COAL MINING HERITAGE	<ul style="list-style-type: none"> <li>. Cemeteries</li> <li>. Museum</li> <li>. Interpretive signage</li> <li>. Unique heritage buildings and houses</li> <li>. Interesting area history</li> </ul>	<ul style="list-style-type: none"> <li>. De</li> <li>. Re</li> <li>. Fu</li> <li>. F</li> <li>. ES</li> <li>. ES</li> </ul>
DOWNTOWN AREA	<ul style="list-style-type: none"> <li>. Quaint buildings and houses</li> <li>. Existing restoration and streetscape</li> <li>. Museum</li> <li>. Downtown Hotels</li> <li>. Well-defined core area</li> <li>. Direct access to downtown area</li> </ul>	<ul style="list-style-type: none"> <li>. Bu</li> <li>. E</li> <li>. ES</li> <li>. V</li> <li>. ES</li> <li>. ES</li> <li>. De</li> <li>. Pr</li> <li>. Ex</li> <li>. ES</li> </ul>
EVENTS AND ACTIVITIES	<ul style="list-style-type: none"> <li>. Lake Days in July</li> <li>. Empire Days in May</li> <li>. Physical resources exist which can be used to expand appeal of events and festivals</li> </ul>	<ul style="list-style-type: none"> <li>. Ex</li> <li>. ES</li> <li>. Pr</li> <li>. S</li> </ul>

CUMBERLAND RESOURCES/OPPORTUNITIES/CONSTRAINTS (continued)			
ISSUE/ACTIVITY	RESOURCES	OPPORTUNITIES	CONSTRAINTS
ACCOMMODATION	<ul style="list-style-type: none"> <li>. Attractive area for tourist accommodation</li> <li>. Campground facilities on Comox Lake</li> </ul>	<ul style="list-style-type: none"> <li>. Limited competitive accommodation facilities</li> <li>. Develop bed and breakfast accommodation in downtown area</li> <li>. Promote lodge/resort development on Comox Lake</li> <li>. Expand and upgrade existing campground</li> </ul>	<ul style="list-style-type: none"> <li>. Limited demand at present . . . difficult to develop new facilities with only moderate growth</li> <li>. Tourist traffic must exit Island Highway to access Cumberland</li> <li>. Parallel promotion and attraction development required</li> <li>. Competition with other mid-island areas</li> </ul>
COMOX LAKE WATERFRONT DEVELOPMENT	<ul style="list-style-type: none"> <li>. Large fresh water lake with good access</li> <li>. Excellent fishing</li> <li>. No competitive facilities</li> </ul>	<ul style="list-style-type: none"> <li>. Develop additional public access</li> <li>. Increase existing access</li> <li>. Provide additional amenities (e.g. boat rentals)</li> <li>. Develop lodge/resort on the lake</li> <li>. Expand existing campground</li> <li>. Promote opportunities as they develop</li> </ul>	<ul style="list-style-type: none"> <li>. Much of the land is privately owned</li> <li>. Access to part of the lake only by private roads</li> <li>. Private sector interest and investment will be required</li> <li>. Lake can be cold for swimming</li> </ul>
SIGNAGE	<ul style="list-style-type: none"> <li>. Some interpretive signage in place</li> <li>. Valuable heritage that could benefit from signage</li> <li>. No existing themes to change</li> </ul>	<ul style="list-style-type: none"> <li>. Provide heritage information in the downtown area</li> <li>. Develop plan for historic building marking</li> <li>. Establish area theme which can be conveyed by signage</li> <li>. Improve directional/promotional signage on Island Highway</li> </ul>	<ul style="list-style-type: none"> <li>. Effective consistent plan required</li> <li>. Some integration with Comox Valley signage program needed</li> <li>. Some limited investment required</li> </ul>

### 6.5 DENMAN AND HORNBY ISLANDS OPPORTUNITIES AND CONSTRAINTS

The islands of Denman and Hornby appear to have been reluctantly drawn into the tourism industry, partially due to the residents' desire for a simple and quiet lifestyle, and partly because of the limited tourism facilities available. The islands do have a significant tourism industry, however, due to their scenic appeal, and close proximity to Vancouver Island and the Island Highway.

The following paragraphs describe a number of the islands' tourism/recreation resources. Also described and tabulated in the exhibit are the opportunities and constraints to enhancing tourism.

#### Parks:

The islands currently have four provincial parks:

- Sandy Island Marine Park
- Fillongley Park
- Tribune Bay Park
- Helliwell Park

The regional district is proposing two additional parks - Mount Geoffrey (Hornby) and Boyle Point (Denman), while B.C. Parks are planning a second marine park around Tribune Bay. Due to the scenic and rural tourist appeal of these islands, these park preservation plans should be endorsed as they will enhance and protect unique resource features.

#### Events:

Craft/arts events and festivals are currently staged on Denman and Hornby Islands. They cater to local residents and have been a considerable draw to the islands. Carefully controlled events, scaled to the islands capacity offer practical and attainable tourism development opportunities.

#### Marine Development:

The islands have only one transient marina located at Ford Cove. Given the marine orientation, the boater market and the ferry/automobile access constraints, additional and/or expanded marina facilities would augment the visitor industry. They would provide an option to the existing ferry, would ensure a concentration of development activity and would not tax the existing transportation systems.

#### Resort Development:

Market demand appears to exist for a three or four season resort property to cater to the family, adult couple and retreat/seminar market. Scaled small (say 20 units), it could cater to the Vancouver Island and Vancouver market offering a unique, self-contained resort experience in an accessible island environment.



Signage:

Creating a unique island signage program would improve visitor information and create a link with other tourism/recreation facilities on the island. Ideally it would be tied into a Valley wide program of consistent, recognizable signs identified with the Comox Valley.

Tours:

Due to the traffic/parking problems on the ferries and the rural road network, small scale escorted tours offer a convenient tourism development opportunity. Using vans rather than buses or conducted bicycle tours would provide an element of tourism control and would reduce pressure on the transportation systems.

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## EXHIBIT A.9

DENMAN AND HORNBY ISLAND OPPORTUNITIES AND CONSTRAINTS			
ISSUE/ACTIVITY	RESOURCE	OPPORTUNITIES	CONSTRAINTS
PARKS	<ul style="list-style-type: none"> <li>. Mount Geoffrey</li> <li>. Boyle Point</li> <li>. Tribune Bay Marina</li> </ul>	<ul style="list-style-type: none"> <li>. Preserve additional areas with high visual appeal and unique resource features</li> </ul>	<ul style="list-style-type: none"> <li>. Resource use conflicts</li> <li>. Reduced commercial development possibility</li> <li>. Maintenance concerns</li> </ul>
EVENTS	<ul style="list-style-type: none"> <li>. Existing seasonal events</li> <li>. Abundance/variety of craftsmen/artists</li> <li>. Success of existing festivals</li> </ul>	<ul style="list-style-type: none"> <li>. Generate increased tourist activity</li> <li>. Minimal capital cost</li> <li>. Tailor to crafts/arts</li> <li>. Sales outlet for artists</li> <li>. Day trips from Vancouver Island</li> </ul>	<ul style="list-style-type: none"> <li>. Crowding/congestion</li> <li>. Existing facility carrying capacity</li> <li>. Planning and organization required</li> </ul>
MARINE DEVELOPMENT	<ul style="list-style-type: none"> <li>. Long island coastlines</li> <li>. Sheltered waters</li> <li>. Marine park(s)</li> </ul>	<ul style="list-style-type: none"> <li>. Limited facilities currently exist</li> <li>. Boater market exists</li> <li>. Augment existing island resources</li> <li>. Low impact tourism</li> </ul>	<ul style="list-style-type: none"> <li>. Development costs</li> <li>. Ecological concerns</li> <li>. Permits/approvals</li> </ul>
RESORT DEVELOPMENT	<ul style="list-style-type: none"> <li>. Attractive scenery</li> <li>. Tranquil setting</li> <li>. Low impact</li> </ul>	<ul style="list-style-type: none"> <li>. Family, adult and corporate market potential</li> <li>. No competition currently exists</li> </ul>	<ul style="list-style-type: none"> <li>. Zoning by-laws</li> <li>. Development costs</li> </ul>
SIGNAGE	<ul style="list-style-type: none"> <li>. Directional and advertising signs exist</li> <li>. Converting to a common theme strengthens the identity</li> </ul>	<ul style="list-style-type: none"> <li>. Relatively inexpensive to implement</li> <li>. Provides continuity</li> </ul>	<ul style="list-style-type: none"> <li>. Consensus on theme required</li> <li>. Implementation agency required</li> <li>. May require changes to sign by-law</li> </ul>
TOURS	<ul style="list-style-type: none"> <li>. Scenic, rural roads</li> <li>. Circle tour possibilities</li> </ul>	<ul style="list-style-type: none"> <li>. Can control transportation</li> <li>. Can develop in scale with markets and road capacity</li> <li>. Could do with bicycles, vans etc.</li> <li>. Offers revenue potential</li> </ul>	<ul style="list-style-type: none"> <li>. Requires organization</li> <li>. Requires marketing</li> <li>. Public support</li> </ul>

## 6.6 RURAL AREAS OPPORTUNITIES AND CONSTRAINTS

The rural areas comprise virtually all of the Comox Valley in terms of geographic area and also contain perhaps 40% of the Valley's population. The area is very spread out and contains a diverse variety of resources, including most of the outdoor recreation activities available in the Valley.

Since most of these resources and activities have been discussed in Section 3.1 - Natural Resources/Tourist Activities, the reader is referred to this earlier chapter, and Exhibit 6.10. There are, however, a series of other developments or activities that could improve the tourism industry in the non-urban areas.

### Park Developments:

The Regional District has prepared a Comox Valley Parks Plan which identifies a series of park additions and expansions. The proposed acquisition list includes:

Puntledge River	Shoreline Park	63ha
Medicine Bowls	Nature Park	12ha
Trent River	Nature Park	<b>106ha</b>
Kye Bay Foreshore	Beach Access	220ha

### Golf Course:

The Comox Valley has one 18-hole course and one regulation 9-hole course which are open to the public. Both are long established. An additional, good quality, resort style golf course, preferably taking advantage of mountain and/or water views would be a major addition to the built recreation facility inventory. Depending on its caliber, it could be a considerable tourist draw to the area. The opportunity to develop a course around residential or retirement housing and/or a resort facility should be explored.

### Marina Development:

Potential exists for a rural area marina facility, possibly in the Union Bay or Fanny Bay area. This would include permanent and transient wharfage. It would allow protected water boating in the Baynes Sound area and around Denman and Hornby Islands.

### Signage:

Signage has been a consistent theme throughout the Comox Valley. Although a signage strategy is easier to implement in a more compact urban area, the opportunity to develop a consistent, thematic sign treatment, linking all areas of the Valley would have positive tourism benefits by providing information and visual continuity.

**Saratoga Raceway:**

Saratoga Raceway is a long established paved, oval automobile racetrack catering to stock car racing and other special events. Approximately 20 events are held annually with a total attendance of about 25,000 of which most are Valley residents or from Campbell River. The facility is in need of upgrading to improve the draw and appeal of motorsport racing.

EXHIBIT 6.10

RURAL AREAS RESOURCES/OPPORTUNITIES/CONSTRAINTS			
ISSUE/ACTIVITY	RESOURCES	OPPORTUNITIES	CONSTRAINTS
SKIING	<ul style="list-style-type: none"> <li>. Mt. Washington</li> <li>. Forbidden Plateau</li> <li>. Paradise Meadows (x-c</li> </ul>	<ul style="list-style-type: none"> <li>. Increase market among Vancouver Island skiers</li> <li>. Create more Vancouver Island skiers</li> <li>. Increase proportion of off-island skiers</li> </ul>	<ul style="list-style-type: none"> <li>. Snow conditions</li> <li>. Expansion and marketing costs</li> <li>. Vancouver Island population (skier) base</li> <li>. Competition with mainland ski areas</li> </ul>
FISHING	<ul style="list-style-type: none"> <li>. Salmon</li> <li>. Marinas/boat launches</li> <li>. Charter Operators</li> <li>. Hatcheries</li> </ul>	<ul style="list-style-type: none"> <li>. Increase market awareness of fishing success rates</li> <li>. Increase marketing and publicity</li> <li>. Expand/develop marina facilities</li> <li>. Expand and market the charter fleet</li> <li>. Expand the shore fishery</li> </ul>	<ul style="list-style-type: none"> <li>. Health of salmon resource</li> <li>. Success of enhancement projects</li> <li>. Impact of sports fishing closures or licence fee changes</li> <li>. Need to use a boat</li> <li>. Competition with Campbell River</li> <li>. Lack of visibility of sports fishing</li> </ul>
HIKING	<ul style="list-style-type: none"> <li>. Forbidden Plateau</li> <li>. Paradise Meadows</li> <li>. Comox Glacier</li> <li>. Seal Bay Park</li> <li>. All beach areas</li> </ul>	<ul style="list-style-type: none"> <li>. Chairlift access to Forbidden Plateau</li> <li>. Series of alpine 1/2 day hikes</li> <li>. Excellent overnight backcountry options</li> <li>. Trails well marked, maintained and safe</li> <li>. Relative proximity and ease of access</li> </ul>	<ul style="list-style-type: none"> <li>. Relative distance from highway and valley communities to alpine areas</li> <li>. Limited market appeal</li> <li>. Limited revenue potential</li> <li>. Marketing costs</li> </ul>
BEACH ACTIVITIES	<ul style="list-style-type: none"> <li>. Extensive sandy beaches</li> <li>. Relatively warm water</li> </ul>	<ul style="list-style-type: none"> <li>. Improve access, signage, parking, washrooms, picnic areas</li> <li>. Increase commercial activity through food concessions, and equipment rentals</li> </ul>	<ul style="list-style-type: none"> <li>. Cost of development and maintenance</li> <li>. Adverse public opinion regarding changes.</li> </ul>

RURAL AREAS (continued)

ISSUE/ACTIVITY	RESOURCES	OPPORTUNITIES	CONSTRAINTS
BOATING/SAILING	<ul style="list-style-type: none"> <li>. Excellent enclosed water boating area</li> <li>. Interesting and extensive coastline</li> <li>. Staging area for Desolation Sound travelers</li> <li>. Existing and proposed marine parks</li> </ul>	<ul style="list-style-type: none"> <li>. Increase marketing effort towards boaters</li> <li>. Generate increased boating activity around Denmand and Hornby</li> <li>. Create a larger market for small trailered boats</li> </ul>	<ul style="list-style-type: none"> <li>. Relative distance from Victoria/Vancouver boater population centres</li> <li>. Perceived access/launching problems by trailered boat owners</li> </ul>
AUTO RACING	<ul style="list-style-type: none"> <li>. Saratoga Raceway</li> <li>. Established motorsport managing association</li> <li>. Established market</li> </ul>	<ul style="list-style-type: none"> <li>. Improve the race track, stands and parking</li> <li>. Increase the number, variety and quality of events</li> <li>. Broaden the marketing effort</li> </ul>	<ul style="list-style-type: none"> <li>. Condition of existing facilities</li> <li>. Adverse public opinion</li> <li>. Relatively confined market area</li> </ul>
HUNTING	<ul style="list-style-type: none"> <li>. Deer</li> <li>. Bear</li> <li>. Upland Game Birds</li> <li>. Waterfowl</li> </ul>	<ul style="list-style-type: none"> <li>. Hunting activity is virtually all local</li> </ul>	<ul style="list-style-type: none"> <li>. Wildlife resources already being harvested in acceptable levels for resource management</li> <li>. Conflicts with residents hunters</li> <li>. Competition from other areas</li> </ul>
GOLF COURSE	<ul style="list-style-type: none"> <li>. Land availability</li> </ul>	<ul style="list-style-type: none"> <li>. Develop for resident, retired and tourist market</li> <li>. Could be significant draw to the Valley</li> </ul>	<ul style="list-style-type: none"> <li>. Development cost</li> <li>. Competition with other courses</li> <li>. Limited revenue potential</li> </ul>
SIGNAGE	<ul style="list-style-type: none"> <li>. Existing signage needs directional improvement</li> <li>. Thematic signing would provide a common element</li> </ul>	<ul style="list-style-type: none"> <li>. Improve directional aspect</li> <li>. Creates an image of "community"</li> <li>. Develop a large point of interest roadside sign at the south end of the Valley</li> </ul>	<ul style="list-style-type: none"> <li>. costs</li> <li>. Cooperation of Ministry of Transportation and Highways</li> <li>. Need to integrate with urban signage programs</li> </ul>

RURAL AREAS (continued)			
ISSUE/ACTIVITY	RESOURCE	OPPORTUNITIES	CONSTRAINTS
DRIVING TOURS	<ul style="list-style-type: none"> <li>. Existing scenery</li> <li>. Several circle tour options</li> </ul>	<ul style="list-style-type: none"> <li>. Keeps visitors in the valley</li> <li>. Provide an opportunity to see varied sights</li> </ul>	<ul style="list-style-type: none"> <li>. Preparation of tour maps</li> <li>. Coordination of related activities</li> </ul>
PARKS (PROPOSED)	<ul style="list-style-type: none"> <li>. Medicine Bowls</li> <li>. Puntledge River</li> <li>. Trent River</li> <li>. Kye Bay Foreshore</li> </ul>	<ul style="list-style-type: none"> <li>. Improved recreation opportunities</li> <li>. Increased variety of park resources</li> </ul>	<ul style="list-style-type: none"> <li>. Development costs</li> <li>. Resource conflicts</li> </ul>
MARINA DEVELOPMENT	<ul style="list-style-type: none"> <li>. Union Bay/Fanny Bay</li> </ul>	<ul style="list-style-type: none"> <li>. Develop a transient and permanent wharfage facility</li> </ul>	<ul style="list-style-type: none"> <li>. Development costs</li> <li>. Breakwater costs</li> <li>. Competition with other facilities</li> <li>. Foreshore oyster leases</li> </ul>

## 7.0 THE PLAN

### 7.1 Tourism Planning Process

The most important and useful component of an evaluation such as this is the specific focus and actions which can increase tourism industry activity in an effective and acceptable manner. Development objectives; focus of the local tourist industry; and specific development, promotion and/or organizational actions combine to define the local or regional tourism development plan. Once these guidelines and actions are integrated with a practical implementation timeframe, priorities are established, and responsibilities for undertaking the action required are identified, the practical tourism development strategy will have been completed.

The Comox Valley is a diversified area which comprises different municipalities and organized areas as well as a variety of tourism resources and attractions. It is important for proponents of tourism in the Valley to recognize and capitalize on the uniqueness and independent objectives of specific areas and municipalities. We consider it essential, however, that these area developments and initiatives be coordinated in a manner that the entire Valley becomes a destination for tourists with a variety of individual area appeals. By cooperating in tourism development while still pursuing local objectives, communities and areas can maintain their own individuality, uniqueness and attractiveness, while benefiting from the advantages associated with joint promotion, a common theme and recognition within the market place that the Valley has a distinct appeal and identity.

This requirement to retain individuality while establishing common actions and goals led us to develop a number of sub-plans within the overall tourism strategy for the Valley. The plan outlined in this chapter, therefore, is separated in to the following components:

- the Town of Comox
- the City of Courtenay
- the Village of Cumberland
- the islands (Denman and Hornby)
- the rural areas
- the Comox Valley in general.

Since this chapter presents our conclusions concerning tourism development, it is important for the reader to appreciate a number of the key factors which have been considered in developing these recommendations. These factors are generally applicable to most



Local and regional objectives need to be determined and taken into account. Ultimately it is the local residents who should benefit, both socially and economically, from tourism industry development. Area and community attitudes vary widely with respect to the type and the level of tourism that is acceptable and desirable.

The nature of tourism activity which is appropriate to develop and promote in any given area must be judged prior to tourism plan development. An integral part of this judgement process is tied directly to an appreciation of local objectives. The experience of professional advisors must also come into play since the local residents are not always familiar with impacts of different types of tourism. Some tourism activity, for example, may generate sufficient demand that local and regional recreation facilities can be developed where they may not be affordable otherwise. From another point-of-view, existing resources such as hiking trails and wildlife may appear to represent tourism opportunities, but in some cases, the tourism involved may lead to minimum levels of spending and limited job creation, which may not meet economic development guidelines.

Commercial and publicly supported initiatives need to be recognized and promoted accordingly. All development requires an investment and the public cannot and should not pay for each of these initiatives. An integral part of any effective tourism development plan is an appreciation of those actions which should be promoted to and undertaken by the private sector due to their commercial viability (e.g. hotels, resorts, restaurants, retail stores, commercial attractions, etc.). Other actions will require support and/or investment by the public, government and/or area businesses in a **cooperative manner** since, as stand alone projects, they will not generate a commercial profit (e.g. public rest areas, signage, area promotion campaigns, heritage development, etc.). It should also be recognized that a variety of actions and developments could well be suited to a joint private sector/public sector investment.

supply and demand considerations reflect reality and the same is true with the tourism planning process. Whether investments are made to attract tourists or whether they are made once a sufficient level of tourism activity exists to support the investment, will always be a concern. Some blending of philosophies on this issue is important. Investments in terms of money and effort are required to facilitate tourism development. As tourism demand increases, additional commitments become more worthwhile. Major investments in unproven products directed toward previously undeveloped markets can occasionally generate major rewards, but frequently are unwise. While such investments may represent too high a risk in one year, the level of risk may decrease quickly over a longer timespan as other initiatives increase the tourism industry base.

Traditional and expected tourist markets should always be a prime consideration when developing an industry strategy. An understanding of the markets which currently generate tourist traffic to the area, the interests of existing visitors, and the markets to which specific tourist industry developments will appeal is fundamental to developing and implementing a successful strategy.

An appreciation of existing tourism resources will provide the basis for developing a successful strategy. Resources range from natural features to **man-made** attractions to special events to human capabilities and energy. All resources need to be understood whether or not they are ultimately utilized or promoted and this includes those which have not as yet been developed.

An appreciation of tourism development constraints is critical if the plan is to be effective and successfully implemented. Constraints will **always exist**. They can range from **anti-tourism attitudes** to **restrictions on land development** to a **shortage of financial or human resources**. While not all constraints can be overcome, their recognition is important. A thoughtful strategy should address, remove and/or overcome these constraints.

An appreciation of likely tourism development impacts is an integral part of a medium-term plan for tourism industry expansion. Communities and areas are interested in the positive **socio-economic** impacts of tourism. Negative impacts that can occur need to be recognized in advance. In this way steps can be taken to minimize or mitigate these implications. Impacts which are neither positive or negative, but which could occur nevertheless, must also be identified so that preparatory steps can be taken. These could include the requirement for such action as municipal services expansion, staffing increases and/or tourism amenity development. Without planning, a municipality could run the risk of countering some of the successful tourism industry development initiatives undertaken as part of its strategy.

We attempted to take all of the above features into account in developing a suitable tourism development strategy and plan for the Comox Valley. As this strategy is implemented, monitored and refined, it will be necessary to continually address these considerations.

## 7.2 COMOX TOURISM STRATEGY

The Municipality of Comox has not become established as a centre for tourism on the east coast of Vancouver Island. In the past, the reason for this has been partly intentional since the community's residents tend to resist major development in this area fearing mainly the impact on 'quality of life' that could be associated with a major tourist influx.

Comox can boast a number of important tourism resources including: its waterfront location and marinas, its scenery, sports fishing in the surrounding waters, the Filberg Lodge and CFB Comox and HMCS Quadra. Opportunities for tourism industry expansion arise from these resources, but need to be tempered with the objectives and aspirations of the community. Furthermore, tourism development faces a number of other constraints as well including the separation of Comox from the well travelled north/south Island Highway.

Our analysis of existing tourism activity, opportunities and constraints in Comox has been combined with our study research and our evaluation of tourist markets to enable us to develop a tourism development strategy for the community. Our recommended strategy is described below.

The research we carried out in Comox has identified several specific objectives concerning tourism development in the municipality. These objectives take into account the success achieved to date, local sensitivities concerning tourism development, available resources, and area attractions and tourism generators. They also reflect a desire within the community to enhance economic diversification opportunities, but to do so in a careful and managed way.

We feel that Comox's tourism development objectives can be summarized as follows:

- to increase tourism moderately in a well managed way
- to promote visitor activities and attractions which do not impact negatively on the style or quality of life currently enjoyed by local residents
- to focus on increasing the length of stay of tourists
- to orient tourism activities towards the water and focus on marine tourism opportunities
- to extend the tourist season to the extent practical.

These specific objectives have enabled us to evaluate existing tourism revenues and constraints in a manner which will address community aspirations while integrating these with an overall strategy for the Comox Valley.

To effectively expand tourism activity in Comox in an acceptable marine r, we have identified a number of types of development which should be focussed on to generate industry growth. These are listed below:

- the existing marina facilities and immediately adjacent marine oriented recreation opportunities
- the relatively concentrated and unique downtown area and its proximity to marine related activities
- the strong presence of Canadian military and training facilities and the exposure afforded by CFB Comox
- the limited dependence to-date of local accommodation facilities, retailers and other services on tourism and the resulting opportunity and need to develop accordingly.

The individual components of this overall focus for tourism development in Comox direct the strategy itself and orient the specific recommendations contained therein.

A number of specific opportunities exist which can lead to tourism industry expansion in Comox. It is, however, important to recognize two important requirements that are directly associated with the community's tourism strategy.

- Comox is an integral part of the Comox Valley and, therefore, its tourism development initiatives need to be integrated with and undertaken in parallel with other similar initiatives in the Valley
- tourism development actions in Comox should concentrate on a limited number-of specific attractions and specific locations so that disruption to local life style is prevented while economic opportunities are created.

Using the results of our analysis of opportunities and constraints in Section 6 and relating these to the tourism development objectives and focus described above, we prepared a set of specific recommendations which will assist Comox in pursuing its goals. These recommendations are summarized in Exhibit 7.1 in a manner which demonstrates recommended timing and which lists actions more-or-less in order of their priority within each specific timeframe.

Individual actions included in Exhibit 7.1 are, generally, part of an ongoing ten-year plan. For example, downtown area and waterfront connector development cannot, and should not, be accomplished over a one or two-year period. Ongoing actions are required over the years in each of a number of areas. These actions incorporate planning, development, implementation, monitoring and refinement as necessary to gradually expand the tourism industry in a sound and viable manner. To assist Comox in undertaking and establishing an ongoing program for specific related initiatives, we have summarized these related actions in Exhibit 7.2.

Exhibit 7.2 identifies the ongoing actions and initiatives that need to be undertaken over time to develop the tourism industry in Comox. Failure to follow-up on early actions undertaken will detrimentally effect the success of industry development initiatives. The community should follow a five to ten-year program to achieve its goals and re-assess the importance of tourism during this period to determine whether the community supports a strategy with expanded scope. The program, or strategy, should be refined and up-dated periodically based on successes achieved and on new priorities and opportunities that will arise on a continual basis.

EXHIBIT 7.1  
COMOX TOURISM STRATEGY

RECOMMENDED		ACTIONS	
IMMEDIATE	SHORT- TERM	MID-TERM	LONG -TERM
(1987)	(1988-1989)	(1990-1992)	(1993-1996)
<p>Establish a marine-oriented theme for the downtown and waterfront areas.</p> <p>Develop a signage program and implement directional and promotional signage in Courtenay and Comox.</p> <p>Develop a plan for downtown area improvement and connector development to marina facilities</p> <p>Undertake one or two smaller projects within this plan.</p> <p>Research new breakwater financing and environmental impact.</p> <p>Lobby and promote to remove waterfront development restrictions immediately adjacent to the downtown core.</p> <p>Prepare a practical and acceptable overall plan for waterfront development and integration with the downtown area. A focus on marine services and marina amenities should be provided on one or two street connectors. Plan public access and improvement to existing breakwater.</p> <p>Develop municipal promotional program and integrate with Comox Valley program. Focus marine opportunities including sport fishing.</p>	<ul style="list-style-type: none"> <li>. Continue with downtown area improvement including street scape, canopies and facades.</li> <li>. Continue connector development to waterfront with emphasis on streetscape and private marine business attraction, including relocation of existing businesses.</li> <li>Establish public recreational marina amenities including laundry and shower facilities adjacent to marinas on downtown connectors.</li> <li>. Complete public access development on existing breakwater.</li> <li>. Continue implementation of signage program consistent with marine theme.</li> <li>. Initiate waterfront development plan including accommodation, craft area and market as extension to downtown/waterfront connector development. Address public sensitivities to waterfront development. Encourage private sector involvement.</li> <li>Design/develop new breakwater while addressing environmental issues.</li> <li>. Work with CFB Comox to increase public access especially with respect to air museum development plans and air show.</li> <li>. Promote marine recreation opportunities to visiting military personnel via CFB Comox.</li> <li>. Continue promotional program with emphasis on marine and downtown attractions and CFB air show. Work with sport fishing association.</li> <li>. Institute tourism industry monitoring program.</li> </ul>	<ul style="list-style-type: none"> <li>Re-evaluate public support for tourism development and increase scope of strategy if appropriate.</li> <li>. Continue with downtown area improvement in conjunction with downtown extension via connectors to the waterfront.</li> <li>. Continue with carefully managed shore development on the waterfront.</li> <li>. Complete new breakwater and plan/design/construct new moorage facilities.</li> <li>. Continue ongoing promotional programs and close liaison with CFB Comox on specific tourism opportunities.</li> <li>. Refine/complete/continue signage program.</li> <li>. Develop waterfront trail to Pt. Holmes and along estuary towards Courtenay.</li> <li>. Continue to monitor tourism industry activity and growth and visitor preferences.</li> <li>. Expand facilities at Filberg Lodge.</li> <li>. Encourage public access to Goose Spit and HMCS Quadra.</li> </ul>	<ul style="list-style-type: none"> <li>. Continue, downtown area and waterfront connector development including attraction of private marine businesses.</li> <li>. Continue managed shore development adjacent to downtown area.</li> <li>. Continue ongoing promotion of principal tourism attraction. Complete/extend signage program as necessary.</li> <li>. Continue to monitor tourism industry characteristics.</li> </ul>

EXHIBIT 7.2  
COMOX

TEN - YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS				
ISSUE	IMMEDIATE	SHORT-TERM	MEDIUM - TERM	LONG-TERM
	(1987)	(1988-1989)	(1990-1992)	(1993-1996)
Signage/Theme	<ul style="list-style-type: none"> <li>• Develop <b>signage</b> program.</li> <li>• Implement directional and promotional <b>signage</b>.</li> <li>• Establish marine theme.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue implementation of signage program.</li> </ul>	<ul style="list-style-type: none"> <li>• Refine/complete/continue <b>signage</b> program.</li> </ul>	<ul style="list-style-type: none"> <li>• Complete/extend signage program.</li> </ul>
Downtown Area/ Waterfront Connector	<ul style="list-style-type: none"> <li>• Develop <b>downtown area/waterfront connector</b> improvement plan.</li> <li>• Undertake 1-2 projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue downtown area improvement.</li> <li>• Continue connector development . . . attract marine <b>businesses</b>.</li> <li>• Establish public amenities on connector(s) . . . laundry, showers.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue downtown area and waterfront connector development.</li> <li>• Attract marine businesses.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue downtown area and waterfront connector development.</li> <li>• Attract businesses.</li> </ul>
Waterfront/ Marina Development	<ul style="list-style-type: none"> <li>• <b>Lobby to remove development restrictions.</b></li> <li>• Prepare overall waterfront development plan . . . integrate with downtown connectors.</li> <li>• Plan public access to existing breakwater.</li> <li>• <b>Research</b> new breakwater potential.</li> </ul>	<ul style="list-style-type: none"> <li>• Complete public access development <b>on</b> existing breakwater.</li> <li>• Initiate waterfront <b>development</b> plan . . . address public sensitivities . . . encourage private sector investment.</li> <li>• <b>Design/develop</b> new breakwater.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue with well managed shore development program.</li> <li>• Complete new breakwater.</li> <li>• Plan/develop new <b>moorage</b> facilities.</li> <li>• Develop new <b>transient moorage</b> facilities.</li> <li>• Develop regional waterfront trail from Courtenay to Pt. Holmes.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue <input type="checkbox"/> anaged shore development.</li> <li>• Expand moorage facilities and ancillary services as required.</li> </ul>
Miscellaneous Attractions	<ul style="list-style-type: none"> <li>• Solicit CFB <b>Comox</b> interest in expanding on the aviation heritage theme.</li> </ul>	<ul style="list-style-type: none"> <li>• Work with <b>CFB Comox</b> re. various base tourism attractions.</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage public <b>access</b> to <b>HMCS</b> Quadra.</li> <li>• Expand <b>Filberg</b> Lodge.</li> </ul>	
Promotion/ Monitoring	<ul style="list-style-type: none"> <li>• Develop municipal promotional program.</li> </ul>	<ul style="list-style-type: none"> <li>• Promote military tourism via CFB <b>Comox</b>.</li> <li>• Continue promotional program.</li> <li>• Institute monitoring program.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Re-evaluate</b> public support . . . expand strategy scope if appropriate.</li> <li>• Continue promotional program.</li> <li>• Continue to monitor industry.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue promotional program.</li> <li>• Continue monitoring program.</li> </ul>

### 7.3 COURTENAY TOURISM STRATEGY

Courtenay, due in part to its established socio-economic base and strategic location, tends to be the focus for tourism activity in the Comox Valley. Both of these factors, however, combined with high levels of pass-through traffic and the existing resources are important indicators that opportunities exist to expand tourism in the community.

Our analysis of existing tourism activity, opportunities and constraints in Courtenay has been combined with research of tourist markets to enable us to develop a tourism development strategy for the community. Our recommended strategy is described in this section of the report.

Our research of many companies, organizations and public sector representatives in Courtenay combined with our research of public opinion has enabled us to identify several specific objectives concerning tourism development in the community. These objectives take into account the success achieved to-date, recognized resources which are yet untapped and the volumes of tourist traffic that currently travel the Island Highway. They also reflect a strong desire within Courtenay to enhance economic opportunities when other area industries are not as healthy as they have been traditionally.

We feel that Courtenay's tourism development objectives can be summarized as follows:

- to increase local tourism activity significantly
- to focus on attracting the substantial, existing pass-through visitor market
- to provide and promote visitor activities and attractions which do not impact severely on the life style of residents
- to expand the length-of-stay of existing tourists
- to develop Courtenay's image and promote it selectively to other tourist markets
- to promote more effectively to the meetings and convention market.

These specific objectives have enabled us to evaluate existing resources and constraints in a manner which will address community expectations while integrating these with an overall strategy for the Comox Valley.



To effectively expand tourism activity in Courtenay in an acceptable manner, we have identified a number of types of development which should form the key focus to generate industry growth. These are listed below:

- the immediately adjacent river, ocean and coastline and the waterfront opportunities that are represented
- the individual building and attraction development opportunities represented by downtown improvement initiatives already underway
- the strength, resolve and initiatives associated with the Comox Valley arts community which **focuses its activities in Courtenay**
- the current appeal as well as the services and amenities available in the downtown area
- the accessibility of the downtown area and the perceived remoteness of a number of waterfront facilities and attractions.

Individual components of this overall focus for tourism development in Courtenay direct the strategy itself and orient the specific recommendations contained therein.

A number of specific opportunities exist which can lead to tourism industry expansion in Courtenay. It is, however, important to recognize these important requirements that are directly associated with the community's tourism strategy as follows:

- Courtenay is an integral part of the Comox Valley and, therefore, its tourism development initiatives need to be integrated with and undertaken in parallel with other similar initiatives in the Valley
- tourism development actions in Courtenay should ensure that industry activity becomes focussed towards specific types of attractions and specific geographical areas so that widespread disruption of local life style is prevented
- tourism development initiatives should be directed to provide a relatively high ratio of economic benefits derived from individual tourist visits.

Using the results of our analysis of opportunities and constraints in Chapter 6 and relating these to the tourism development objectives and focus described above, we prepared a set of specific recommendations which will assist Courtenay in pursuing its goals. These recommendations are described in Exhibit 7.3 in a manner which demonstrates recommended timing and which lists actions more-or-less in order of their priority within each specific timeframe.

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Individual actions included in Exhibit 7.3 form part of an ongoing ten-year plan. For example, public waterfront access and waterfront commercial development cannot, and should not, be accomplished over a one or two-year period. Ongoing actions are required over the years in each of a number of areas. These actions incorporate planning, development, implementation, monitoring and refinement as necessary to gradually expand the tourism industry in a sound and viable manner. To assist Courtenay in undertaking and establishing an ongoing program for specific related initiatives, we have summarized these related actions in Exhibit 7.4.

Exhibit 7.4 identifies the ongoing actions and initiatives that need to be undertaken over time to develop the tourism industry in Courtenay. Failure to follow-up on early actions undertaken will detrimentally effect the success of industry development initiatives. The community should follow a ten-year program to achieve its goals. The program, or strategy, should be refined and up-dated periodically based on successes achieved and on new priorities and opportunities that will arise on a continual basis.

EXHIBIT 7.3  
COURTENAY TOURISM STRATEGY

RECOMMENDED		ACTIONS	
IMMEDIATE	SHORT-TERM	MID-TERM	LONG - TERM
(1987)	(1988-1989)	(1990-1992)	(1993-1996)
<p>Initiate planning for public waterfront access and waterfront commercial development. Consider Inkster property possibilities.</p> <p>Develop signage program and implement directional signage improvement as well as gateway signage. Review by-pass signage.</p> <p>Coordinate and undertake planning/feasibility work for the proposed arts/convention centre.</p> <p>Integrate Courtenay promotion efforts . . . both public sector and private sector . . . with those of Comox Valley.</p> <p>Coordinate, expand and aggressively promote existing annual activities and events.</p> <p>Secure a developer for an R.V. park development in or near the downtown area.</p> <p>Review markets and development opportunities for a family oriented commercial attraction. Evaluate air park expansion as a private, small plane base.</p> <p>Plan specific building and downtown area improvements (e.g. train station, extension of improvement plan completed, etc.)</p> <p>Work jointly with other communities and areas to establish one or two (summer/winter) themes for the Valley.</p> <p>Test feasibility of an expanded equestrian facility.</p>	<ul style="list-style-type: none"> <li>. Finance and initiate phased waterfront development plan through publicly financed action and through private developer promotion. Focus on ocean and river access.</li> <li>. Initiate clearing and upgrading of Comox Logging Railway trail for public use to provide water access.</li> <li>. Continue implementation of signage program with emphasis on directional and informative signage consistent with Comox Valley theme(s).</li> <li>. Undertake fund raising/funding action for the proposed arts/convention centre based on evaluation results and initiate site acquisition/detailed design.</li> <li>. Refine and continue promotional program.</li> <li>. Obtain provincial government support for air park development, design and complete.</li> <li>. Build family oriented commercial visitor attraction.</li> <li>. Undertake promotional discussions with air carriers concerning charters and scheduled flights.</li> <li>. Develop R.V. park if feasible.</li> <li>. Continue work to ensure major event expansion, quality and promotion.</li> <li>. Consider/plan a new downtown street festival which would have regional appeal and directly benefit merchants.</li> <li>. Lobby for ski train establishment in conjunction with Valley proponents.</li> <li>. Encourage sports fishing industry investment by the private sector while providing support through promotion and signage.</li> <li>. Encourage private sector establishment of river and coastline tours.</li> <li>. Develop a plan of beautification for the south entrance to the city.</li> </ul> <p>(Continued under Long-Term)</p>	<ul style="list-style-type: none"> <li>. Continue to undertake and promote waterfront access/waterfront development plan. Provide opportunities for private sector involvement.</li> <li>. Re-evaluate public support for tourism and redefine strategy as appropriate.</li> <li>. Encourage accommodation facility upgrading, expansion and development as demand warrants . . . especially waterfront.</li> <li>. Complete Comox Logging Railway trail development.</li> <li>. Complete/promote arts/convention centre if feasible based on earlier evaluation.</li> <li>. Continue refinement and implementation of signage program.</li> <li>. Refine and continue promotional program, including air park facilities and convention centre if appropriate.</li> <li>. Continue expansion and promotion of traditional and new events/festivals . . . including those associated with the arts.</li> <li>. Develop equestrian facility if warranted.</li> <li>. Continue to encourage local sports fishing industry investment in conjunction with waterfront development plan.</li> <li>. Encourage/support ski train and ski packages and promotions with downtown operators and merchants.</li> <li>. Continue with ongoing downtown area improvement program.</li> <li>. Continue to monitor tourism industry activity and growth and visitor preferences.</li> <li>. Evaluate and plan municipal service/amenity development needs arising from tourism.</li> </ul>	<ul style="list-style-type: none"> <li>. Continue/complete waterfront access/waterfront development plan.</li> <li>. Encourage ongoing private sector investment in accommodation and commercial events, services and attractions . . . waterfront and/or downtown oriented to the extent practical.</li> <li>. Re-assess, refine and continue aggressive and coordinated promotion.</li> <li>. Update/refine signage as necessary.</li> <li>. Evaluate ongoing expansion of major summer and winter festivals and events to new and wider-ranging markets. Respond with promotion as appropriate.</li> <li>. Consider inter-provincial and international charter package promotion of ski industry and sporta fishing industry. Respond based on evaluation.</li> <li>. Continue support of accommodation and other tourist services development.</li> <li>. Continue to monitor tourism industry characteristics.</li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> <li>. Initiate phased/ongoing downtown area improvements including specific building restorations.</li> <li>. Work with the native band to determine interest in developing tourism oriented facilities on I.R.No. 2.</li> <li>. Expand the annual winter carnival in the downtown area. Work with ski industry and promote aggressively.</li> <li>. Institute tourism industry monitoring program.</li> </ul> </div>

EXHIBIT 7.4  
COURTNEY

10-YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS

IMMEDIATE (1987)	SHORT-TERM (1988 - 1989)		
<ul style="list-style-type: none"> <li>Program and implement</li> <li>onal and gateway</li> <li>me(s).</li> <li>ific improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Continue signage program.</li> <li>Focus on coastal access and fishing.</li> </ul>	<ul style="list-style-type: none"> <li>Refine/continue signage program.</li> </ul>	
<ul style="list-style-type: none"> <li>planning process.</li> <li>Inkster property.</li> </ul>	<ul style="list-style-type: none"> <li>Finance and initiate phased access/development plan.</li> <li>Plan/initiate upgrading of logging railway.</li> </ul>	<ul style="list-style-type: none"> <li>Continue with improvement program.</li> <li>Complete logging railway trail development.</li> </ul>	<ul style="list-style-type: none"> <li>Continue/complete implementation of plan.</li> <li>Ongoing encouragement of private sector involvement.</li> </ul>
<ul style="list-style-type: none"> <li>planning and</li> <li>lity work.</li> <li>e, expand and</li> <li>existing events.</li> </ul>	<ul style="list-style-type: none"> <li>Raise financing and initiate site acquisition and detailed design.</li> <li>Ensure continued quality, expansion and promotion.</li> <li>Plan a new downtown street festival.</li> <li>Plan a winter carnival in downtown area.</li> </ul>	<ul style="list-style-type: none"> <li>tract and promote.</li> <li>Continued expansion and promotion of all events/festivals.</li> </ul>	<ul style="list-style-type: none"> <li>Ongoing promotion.</li> <li>Evaluate major market expansion and respond via promotion.</li> </ul>
<ul style="list-style-type: none"> <li>and plan R.V. park</li> <li>ment.</li> </ul>	<ul style="list-style-type: none"> <li>Develop R.V. park if feasible.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage accommodation upgrading/development ... especially waterfront.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage ongoing investment ... downtown and waterfront</li> <li>Continue support of accommodation development.</li> </ul>
<ul style="list-style-type: none"> <li>plan air park</li> <li>ment.</li> </ul>	<ul style="list-style-type: none"> <li>Obtain support for air park ... design and complete.</li> <li>Promote air carriers.</li> <li>Lobby for ski train.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage promotion as appropriate.</li> </ul>	

EXHIBIT 7.4 (continued)  
COURTENAY

TEN - YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS				
ISSUE	IMMEDIATE	SHORT-TERM	MEDIUM-TERM	LONG-TERM
	(1987)	(1988-1989)	(1990-1992)	(1993-1996)
Other Attractions	<ul style="list-style-type: none"> <li>Evaluate suitable commercial, family oriented visitor attraction.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage sports fishing investment . . . promote. Encourage river/coastline tour development.</li> <li>Build commercial attraction.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage/assist sports fishing industry. Encourage/support ski packages with private sector in downtown area.</li> </ul>	<ul style="list-style-type: none"> <li>Consider/support inter-provincial and international: ski and sports fishing packages.</li> </ul>
Promotion/ Monitoring/ Miscellaneous	<ul style="list-style-type: none"> <li>Integrate local with Valley promotion efforts.</li> </ul>	<ul style="list-style-type: none"> <li>Refine and continue promotional program.</li> <li>Promote air carriers, sports fishing, skiing and downtown</li> <li>Institute tourism industry monitoring.</li> </ul>	<ul style="list-style-type: none"> <li>Refine and continue promotional program. Promote air park, air carriers skiing, fishing, downtown and waterfront developments.</li> <li>Re-evaluate public support for tourism.</li> <li>Continue to monitor industry.</li> <li>Evaluate/plan municipal services/amenities.</li> </ul>	<ul style="list-style-type: none"> <li>Re-assess, refine and continue promotion.</li> <li>Major expansion possible re. event/festival promotion.</li> <li>International marketing re. fishing and skiing. Continue to monitor industry.</li> </ul>

#### 7.4 CUMBERLAND TOURISM STRATEGY

The Municipality of **Cumberland** and its immediately surrounding area has experienced only limited tourism activity in the past. Partially because it has not had much tourism activity or other new development, its undiscovered and heritage nature are perhaps **Cumberland's** biggest tourist assets. Consequently, it offers a number of attractions of specific interest to tourists and opportunities which can be developed to generate additional economic activity. Our analysis of these opportunities and constraints has been combined with our study research of tourist markets to enable us to develop a tourism development strategy for **Cumberland**. The recommended strategy is described in this section of the report.

Based on our research, we have produced a number of basic objectives for **Cumberland** which directly relate to tourism industry development. These objectives reflect our perception that low impact tourism development is the most appropriate for the community, respecting residents concerns about impacts on lifestyles. They also reflect a desire within the area to enhance economic opportunities and consider the number of important resources that could appeal to **Comox Valley** visitors.

We feel that **Cumberland's** tourism development objectives can be summarized as follows:

- to generate moderate increases in tourism activity
- to focus on expanding visitor day-trips to the community
- to provide and promote visitor activities and attractions which do not impact severely on the life style of residents
- to extend the seasonality of tourism activity.

These specific objectives enabled us to evaluate existing resources and constraints in a manner which are community-specific, in addition to the requirement for an integrated tourism strategy for the **Comox Valley**.

To effectively expand tourism activity in **Cumberland** in an acceptable manner, we have established the following items as a focus for industry growth:

- the existing activities and considerable resource associated with **Comox Lake**

Individual components of this overall focus for tourism development in Cumberland direct the strategy itself and orient the specific recommendations contained therein.

A number of specific opportunities exist which can lead to tourism industry expansion in Cumberland. It is important, however, to recognize two important requirements that are directly associated with the community's tourism strategy.

- Cumberland is an integral part of the Comox Valley and, therefore, its tourism initiatives need to be integrated with and undertaken in parallel with other similar initiatives elsewhere in the Valley
- tourism development oriented actions in Cumberland and the immediately surrounding area should concentrate on moderate and streamlined attractions and not major development projects.

Using the results of our analysis of opportunities and constraints in Chapter 6 and relating these to the objectives of and focus for tourism development described above, we prepared a set of specific recommendations which are designed to assist Cumberland's development. These recommendations are described in Exhibit 7.5 in a manner which demonstrates recommended timing and priorities.

Exhibit 7.6 identifies the ongoing actions and initiatives that need to be undertaken over time to develop the tourism industry in Cumberland. Failure to follow through with early action that is taken will detrimentally effect development of the industry. The community should follow a ten-year program to achieve its goals. The program, or strategy, should be refined and up-dated periodically based on successes achieved and on new priorities that generally arise on a continual basis.

RECOMMENDED ACTIONS			
IMMEDIATE	SHORT-TERM	MID-TERM	LONG-TERM
(1987)	(1988- [989)	(1990-1992)	(1993-1996)
<ul style="list-style-type: none"> <li>. Establish promotional signage on Island Highway.</li> <li>Continue downtown area improvements in a heritage context.</li> <li>. Expand appeal and scope of Empire Days and Lake Days.</li> <li>. Establish heritage-oriented theme for downtown Cumberland and a plan to convey this theme.</li> <li>. Plan 3-season participation in Comox Valley tourism promotion program.</li> <li>. Evaluate, review, plan opportunities for Comox Lake development (commercially-oriented).</li> <li>. Initiate theme conveyance in the spring of '87 through relatively inexpensive means (e.g. signage, flags, banners, planters, general appearance improvement, etc.)</li> <li>Pursue concept refinements and financial support for the Chinese heritage development.</li> <li>Design a self-guided walking tour through downtown and driving tour through the surrounding area.</li> </ul>	<ul style="list-style-type: none"> <li>. Encourage/promote 3-season lodge development on Comox Lake.</li> <li>. Promote Cumberland as tourist attraction.</li> <li>. Plan, finance and implement specific heritage-oriented physical improvements/restorations in the downtown area . . . also streetcape . . . possibly canopies.</li> <li>. Gradually increase scope of Empire Days in May and establish a heritage-oriented downtown event in July or August . . . ensure strong promotion . . . involve touring exhibits/performers.</li> <li>. Encourage downtown area accommodation development consistent with downtown development theme . . . focus on small facilities (e.g. bed and breakfast).</li> <li>. Develop a model of the early Chinatown for display in the museum.</li> <li>. Improve public access to Comox Lake and facilities expansion (e.g. boat rentals, campground, fishing guides, etc.</li> <li>. Establish interpretive and informative signage in the downtown area consistent with the community theme.</li> </ul>	<ul style="list-style-type: none"> <li>. Development of a small Chinese heritage village as an attraction in the downtown area.</li> <li>. Plan, finance and implement selected physical restorations or re-creations oriented to the established community theme (... including walking tour)... possible restoration of unique houses as retail shops.</li> <li>. Conclude/support 3-season lodge development on Comox Lake.</li> <li>. Expand appeal of spring and summer events through promotion.</li> <li>. Encourage ongoing small accommodation facility development based on demand.</li> <li>. Continue implementation of themed signage program.</li> <li>. Encourage establishment of small, seasonal, retail shops . . . some in restored buildings or houses.</li> <li>. Continue effective and integrated promotional program.</li> <li>. Evaluate and support, as 3-season commercial development on Comox Lake.</li> <li>. Continue to monitor tourism industry activity and growth and visitor preferences.</li> </ul>	<ul style="list-style-type: none"> <li>. Finance and develop heritage village attraction to the extent it is considered feasible.</li> <li>. Conclude or continue downtown restorations and improvements.</li> <li>. Continue promotional activities.</li> <li>. Ensure ongoing appeal and awareness of spring and summer events.</li> <li>. Fine-tune signage program as required.</li> <li>. Continue support of accommodation and other tourist services development.</li> <li>. Continue to monitor tourism industry characteristics.</li> </ul>



TEN - YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS				
ISSUE	IMMEDIATE	SHORT-TERM	MEDIUM - TERM	LONG-TERM
	(1987)	(1988-1989)	(1990-1992)	(1993-1996)
Signage	. Promotional signage on highway.	Downtown signage.	. Continue signage program.	. Fine-tune signage program.
Downtown Area & Services	. Downtown area improvements. Downtown area theme. . Initiate theme conveyance.	. Physical improvements and restorations. . Downtown accommodation. . Downtown restaurant.	. Selected, themed restorations. . Demand supported accommodation development . Small, seasonal retail shops.	. Conclude/continue downtown redevelopment. . Support tourist accommodation and services.
Events	Expand scope and appeal of existing events.	. Establish new event/festival and expand/promote all events.	. Expand appeal of events through promotion.	. Ensure ongoing appeal and awareness.
Other Attractions	. Evaluate Comox Lake development prospects.	. Encourage/promote Comox Lake lodge development. . Improve public access to Comox Lake. . Develop a model of early Chinatown.	. Conclude/support Comox Lake lodge development. Evaluate/plan Chinese village development. . Evaluate/support commercial development on Comox Lake.	. Finance and develop Chinese heritage village.
Promotion/ Monitoring	. Plan joint promotion with Comox Valley.	. Promote as tourist attraction. . Institute monitoring program.	. Continue promotion. . Continue to monitor industry.	. Continue promotion. . Continue monitoring program.

## 7.5 HORNBY AND DENMAN ISLAND TOURISM STRATEGY

The islands of Denman and Hornby have experienced tremendous growth in tourism over the last two decades, including both conventional tourists and second home residents. These visitor pressures have caused a series of unique problems for the islands because of their finite carrying capacity, fragile ecology, and limited number of tourism facilities. Additional problems have been caused by infrastructure, including access, water supplies and sewage disposal. Based on these factors and the opportunities and constraints discussed in Chapter 6.0, we have prepared a series of tourism objectives.

These objectives are based on our assessments of the islands' unique features, their existing and potential markets, their development opportunities and their constraints. As in the other geographic areas within the Comox Valley, the objectives are an attempt to reflect the optimum balance among developing the resource to its potential, protecting the environment, creating economic activity, and respecting the views of residents. Based on these guidelines, the proposed objectives are as follows:

- to generate moderate increases in tourism activity
- to encourage tourism development in scale with the islands' existing development
- to improve shoulder season tourism
- to respect environmental sensitivity of the islands
- to minimize undesirable impacts on island residents.

To meet these objectives the following tactics or focus is suggested:

- build on the natural resources of the islands in terms of land and water based attributes
- expand the accommodation base in response to demand focusing on small owner-operator lodge or bed and breakfast properties
- stress the islands' unique features, and their relative remoteness, and their close proximity to Vancouver Island
- preserve the islands' unique features through park development
- utilize the existing strengths of outdoor recreation and diving
- improve private boat access and marine facilities.

As with the other geographic areas within the Comox Valley, the following concepts override individual decisions about specific actions on Denman and Hornby Island.

- Denman and Hornby Islands are unique but integral parts of the Comox Valley and their tourism initiatives need to be integrated with and undertaken in concert with developments or activities in other parts of the Valley.
- Tourism activities and developments should be in scale with the islands rural environment.

Individual actions included in Exhibit 7.7 form part of an ongoing ten-year plan. Ongoing actions are required over the years in each of a number of areas. These actions incorporate planning, development, implementation, monitoring and refinement as necessary to gradually expand the tourism industry in an acceptable and viable manner. To assist the islands in undertaking and establishing an ongoing program for specific actions, we have summarized these related actions in Exhibit 7.8.

Exhibit 7.8 identifies the ongoing actions and initiatives that should be undertaken to develop the tourism industry on Denman and Hornby Islands. Failure to follow-up on early actions undertaken will detrimentally effect the success of industry development initiatives. The islands should adopt a ten-year program to achieve these goals. The strategy should be refined and up-dated periodically based on successes achieved and on new priorities and opportunities that will arise on a continual basis.

## RECOMMENDED

IMMEDIATE	SHORT- TERM	
(1987)	(1988-1989)	
<ul style="list-style-type: none"> <li>. Support establishment of a marine park along the south coast of Hornby Island.</li> <li>Support establishment of regional parks on Mt. Geoffrey on Hornby Island and Boyle Point on Denman Island.</li> <li>Review opportunities to develop a crafts outlet/ marketing cooperative/arts centre.</li> <li>. Promote the special interest, small scale markets i.e. retreats, honeymoon, educational etc.</li> <li>. Initiate planning to re-start a summer festival.</li> <li>. Organize guided tours of the craft studios and market to island visitors.</li> <li>Develop a signage program of unique but consistent directional signs.</li> <li>. Initiate planning of a long term transportation plan including to-island and ou-island elements.</li> </ul>	<ul style="list-style-type: none"> <li>. Assess the demand for expanded marine facilities</li> <li>. Develop small scale packaged tours of the islands around a common theme, i.e. cycling, diving, crafts, etc.</li> <li>. Develop a satellite tourism information office.</li> <li>. Review demand for a 4-season, full service, small scale resort development.</li> <li>. Concentrate on expanding the diving market.</li> <li>. Review demand and themes for an off-season event (possibly fall) and initiate planning if favorable.</li> <li>. Start negotiations to develop a public oyster/clam beach.</li> <li>. Monitor demand for ferry service and accommodate peak demand periods with extended hours or shuttle service.</li> <li>. Implement signage program of tastefully done, consistently themed signs.</li> </ul>	<ul style="list-style-type: none"> <li>. De</li> <li>. In</li> <li>. In</li> <li>. Re</li> <li>. Fo</li> <li>. Mo</li> <li>. En</li> <li>. Re</li> </ul>

TEN - YEAR INTEGRATION OF SPECIFIC		
ISSUE	IMMEDIATE	SHORT-TERM
	(1987)	(1988-1989)
Marine Development	. Support establishment of marine park.	. Monitor demand for in marina facilities.
Even ts	. Determine interest in re-doing a summer festival.	. Review demand for an season festival or
Facility Development	Determine interest in a centralized craft/arts centre (sales, training etc.).	. Review demand for a 4 small scale resort development.
Recreation Facilities	Map and mark all walking trails. . Support development of Mt. Geoffrey and Boyle Point regional parks.	. Expand marketing and facilities for dive . Determine feasibility developing a public oyster beach.
Tours/Access	. Identify appropriate small group tour markets. . Organize tours of craft studios (and market) . Develop unique, consistent sign program.	. Develop and market sm scale activity orie tour packages. Develop a satellite t information office. . Monitor ferry demand.

## 7.6 RURAL AREAS TOURISM STRATEGY

The rural areas of the Comox Valley study area cover a large geographical area and a wide variety of resources and tourism opportunities. For these reasons, it is difficult to generalize so we have broken the area down farther into three sub-groups. These are:

- the coastal strip from Fanny Bay to **Royston**
- the coastal strip from Kye Bay to the Oyster River
- the inland and mountain areas.

The tourism objectives for these areas reflect the natural resources, existing markets and public aspirations. These objectives are designed to utilize the area's tourism resources and markets to put in place a more structured tourism strategy. The objectives are as follows:

- to generate significant increases in tourism activity
- to improve the four season appeal of the area
- to increase the length of stay
- to decrease the pass-through traffic
- to increase the volume of tourism in specialty activity areas.

To translate these objectives into specific items for action, we have assembled a list of factors which address the general focus:

- preserve the existing natural resources while encouraging quality ancillary developments
- focus increased marketing and development on skiing and fishing as the two main tourism generators
- with the exception of selected sports activities there is little to do in the area for the family vacation market
- take advantage of the extensive coastline for future waterfront/marine oriented developments or activities
- divert existing pass-through traffic to the secondary highways as a scenic alternative.

As with the other geographic areas within the Comox Valley, the following concepts override individual decisions about specific actions in the rural areas:

- The rural areas form a component of the Comox Valley's tourism resource, as do the three municipalities and the islands. Tourism activities in each area will effect the activities in other areas and development initiatives should be coordinated on a Valley-wide front.

- Tourism activities should be based on the areas physical resources with developments designed to increase visitor enjoyment of these resources.

Individual recommendations forming part of an ongoing ten-year plan are tabulated in Exhibit 7.9. Ongoing actions are required in each of a number of activity areas. These actions incorporate planning, development, implementation, monitoring and refinement as necessary to gradually expand the tourism industry. To assist the rural areas in undertaking and establishing an ongoing program for specific related initiatives, we have summarized these related actions in Exhibit 7.10.

Exhibit 7.10 identifies the ongoing actions and initiatives that should be undertaken to develop the tourism industry. Failure to follow-up on early actions undertaken will detrimentally effect the success of industry development initiatives. The communities should follow the ten-year program to achieve its goals, refining and up-dating the plan periodically as needs dictate.

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RECOMMENDED		ACTIONS	
IMMEDIATE	SHORT-TERM	MID-TERM	LONG - TERM
(1987)	(1988-1989)	(1990-1992)	(1993-1996)
<ul style="list-style-type: none"> <li>. Continue marketing emphasis on skiing.</li> <li>. Reposition fishing as a major summer and fall activity.</li> <li>. Solicit cooperation among outlying communities and regional district electoral areas regarding tourism priorities, and responsibilities.</li> <li>. Improve directional signage as part of the valley wide signage program.</li> <li>. Support development and enhancement of park and wilderness areas.</li> <li>. Initiate R.V. park at Union Bay.</li> <li>. Improve the water access and perceived boat launch shortage.</li> </ul>	<ul style="list-style-type: none"> <li>Develop lodge/hotel type accommodation at Mt. Washington.</li> <li>Develop fishing packages for the existing tourist market.</li> <li>. Explore heli-skiing or snow cat skiing possibilities.</li> <li>. Develop and market guided tours for individual and groups at Paradise Meadows.</li> <li>. Review opportunities for a new, water oriented resort in the Kye Bay area or other sandy beach location.</li> <li>. Confirm markets and financial aspects of night-skiing and of snow making equipment.</li> <li>. Develop a series of ½ and full day tours including various sights and activities.</li> </ul>	<ul style="list-style-type: none"> <li>. Develop fishing charter business from the B.C. interior and lower mainland.</li> <li>. Continue aggressive marketing to the casual and aggressive fisherman.</li> <li>. Develop additional or expanded marina facilities at Union Bay/ Fanny Bay.</li> <li>. Expand the lift capacity at Mt. Washington and Forbidden Plateau if demand warrants.</li> <li>. Expand on-mountain accommodation at Mt. Washington.</li> <li>. Expand tour market for both in-bound tours and local mini-tours.</li> <li>Improve road access.</li> <li>. Re-evaluate status of tourism strategy and public support, and refine as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>. Continue expansion of the ski areas, being careful to respond to demand, not lead it.</li> <li>. Expand charter boat fleet as needed.</li> <li>Continue aggressive marketing of skiing, fishing, outdoor recreation and the arts.</li> <li>. Determine markets for new or expanded water-oriented resort developments.</li> <li>. Expand cruise ship facilities if warranted.</li> <li>Monitor demand for tours and respond to demand.</li> </ul>



TEN - YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS				
ISSUE	IMMEDIATE	SHORT-TERM	MEDIUM - TERM	LONG-TERM
	(1987)	(1988-1989)	(1990-1992)	(1993-1996)
Skiing	<ul style="list-style-type: none"> <li>Continue marketing to Vane. Island residents primarily and off-island markets secondarily.</li> </ul>	<ul style="list-style-type: none"> <li>Develop lodge/hotel type accommodation at Mt. Washington.</li> <li>Explore heli-skiing or snow-cat skiing opportunities.</li> <li>Confirm snow making and night skiing feasibility at Forbidden Plateau.</li> </ul>	<ul style="list-style-type: none"> <li>Expand the uphill capacity at Mt. Washington if warranted.</li> <li>Expand on-mountain accommodation if demand warrants.</li> <li>Review potential for increased summer use.</li> </ul>	<ul style="list-style-type: none"> <li>Continue cautious expansion, responding to market demand.</li> </ul>
Fishing	<ul style="list-style-type: none"> <li>Improve organization of fishing guides.</li> <li>Improve awareness of fishing charters availability among existing visitor market.</li> </ul>	<ul style="list-style-type: none"> <li>Develop packages for the existing automobile market.</li> <li>Improve profile of fishing as a visitor activity.</li> </ul>	<ul style="list-style-type: none"> <li>Develop fly-in packages from Vancouver and B.C. Interior.</li> <li>Continue aggressive marketing to the casual and serious sports fisherman.</li> </ul>	<ul style="list-style-type: none"> <li>Expand charter fleet as demand warrants.</li> <li>Continue marketing.</li> </ul>
Hiking	<ul style="list-style-type: none"> <li>Improve awareness of park system trails.</li> <li>Improve directional signage to hiking areas.</li> <li>Support the Regional District park plan.</li> </ul>	<ul style="list-style-type: none"> <li>Develop and market guided tours of Paradise Meadows.</li> <li>Review opportunities for new trails close to population centres.</li> </ul>	<ul style="list-style-type: none"> <li>Utilize on-mountain accommodation for family based hiking.</li> </ul>	<ul style="list-style-type: none"> <li>Expand hiking trail network focusing on the family market.</li> </ul>
Other development	<ul style="list-style-type: none"> <li>Negotiate R.V. park lease with property owners at Union Bay.</li> <li>Determine cruise ship tender boat docking facilities.</li> </ul>	<ul style="list-style-type: none"> <li>Review feasibility for a modern resort development at Kye Bay or other sandy beach location.</li> <li>Review feasibility for a new golf course with a recreation/retirement focus.</li> </ul>	<ul style="list-style-type: none"> <li>Develop additional or expanded marina facility as demand dictates in the Union Bay/Fauny Bay area.</li> <li>Improve road access.</li> </ul>	<ul style="list-style-type: none"> <li>Expand cruise ship facilities if warranted.</li> </ul>

EXHIBIT 7.10 (continued)

RURAL AREAS

TEN - YEAR INTEGRATION OF SPECIFIC STRATEGY RECOMMENDATIONS				
ISSUE	IMMEDIATE	SHORT-TERM	MEDIUM - TERM	LONG-TERM
	(1987)	(1988-1989)	(1990-1992)	(1993-1996)
Tours	<ul style="list-style-type: none"> <li>Review requirements of cruise ships and solicit interest.</li> <li>Develop a series of circle driving tours and promote.</li> <li>Contact tour bus companies and promote using Comox Valley as a meal and overnight stop.</li> </ul>	<ul style="list-style-type: none"> <li>Provide facilities for cruise ship tender boats.</li> <li>Develop ground operation tours for cruise ship passengers.</li> <li>Develop tour bus business by packaging interesting things to do.</li> <li>Develop additional scenic viewpoints to better orient visitors to the ocean and mountains.</li> </ul>	<ul style="list-style-type: none"> <li>Expand tour markets as warranted.</li> <li>Develop cooperative tour packages with other Vancouver Island destinations.</li> </ul>	<ul style="list-style-type: none"> <li>Monitor demand for new tour products.</li> </ul>

## 7.7 COMOX VALLEY TOURISM STRATEGY

Based on the common elements of the separate sub-regional plans, and on the issues of general priority, we have prepared an overall plan for the Comox Valley. It is designed to augment and coordinate the five separate area plans with an overall Valley framework.

Although development of most specific recommendations will require implementation at the local level, to be of the most benefit, these actions need to be coordinated in a general, Valley-wide plan.

As with the five separate geographic plans, the overall Comox Valley plan is based on the area's:

- resources (natural, built, human and heritage . . .)
- markets (geographic areas, segments, activity orientation . . .)
- public aspirations (attitudes, perceptions, lifestyle . . .)

The following is a brief summary of each of these elements:

### Resources

<u>Natural</u>	<u>Built</u>	<u>Human</u>	<u>Heritage</u>
- Scenery	Museums	- Arts	- Native
- Climate	Hotels/Motels	- Crafts	- Maritime
- Skiing	Campgrounds	- Ethnic	- Coal
- Fishing	Events	- Lifestyles	- Logging
- Hiking	Recreation fat.	- Theatre	- Transportation
- Diving	Military fat.		- Settlement
- Boating	Downtown areas		
	Golf Courses		
	Saratoga Raceway		

### Markets

<u>Geographic Areas</u>	<u>Segments</u>	<u>Activity Interests</u>
Vancouver Island	Pleasure travelers	Skiing
Lower Mainland	Families	Fishing
B.C. Interior	Empty-nesters	Arts
Alberta	Recreational/sports	Military
Pacific N.W.	Conventions	Beach Activities
Other Canada		Boating
Other USA		Diving
International		Camping

### Public Aspirations

A basic strength (or weakness) of any tourism oriented community is its residents. Their age, ethnic background, occupations, education and their own travel experience contribute to their attitudes towards tourism. These attitudes as indicated by actions, can run the range from outright hostility towards visitors, through reluctant tolerance to enthusiastic welcoming.

All three municipal councils are on record as supporting tourism and have incorporated the tourism industry into their Official Community Plans, in terms of preserving parkland; upgrading the appearance of the business sector; and developing public facilities, transportation facilities, and public access. The Regional District of Comox-Strathcona in its Comox Valley Official Settlement Plan also makes provision for accommodating tourism through its goals of expanding and diversifying the economic base and protecting the natural environment.

The Island's Trust, having land use jurisdiction for Denman and Hornby Islands, also recognize tourism's potential contribution, although careful consideration of scale, effect on the environment and impact on lifestyles are of paramount importance.

These local government positions and the results of our interviews with selected special interest group representatives indicates a favorable disposition towards tourism, within the confines of resource carrying capacity, congestion, maintaining the environmental quality lifestyle, and scale of development.

Based on our analysis of the Comox Valley resources, markets and community aspirations, the most appropriate and achievable tourism objectives are as follows:

- to increase tourism moderately
- to utilize the Valley's natural resources as the prime tourism focus
- to augment these resources with other built attractions and community improvements
- to increase the length of stay
- to decrease the pass-through situation
- to extend the tourism seasons
- to minimize the impact on resident lifestyles and quality of life.

These objectives are generally thought to be acceptable throughout the Valley, within the confines of the individual area refinement previously noted. The tactics or procedures recommended to meet these objectives can be summarized into four items, listed below in the general order of priority.

The fundamental conclusions of the analysis which form the basis of the Valley's tourism strategy are as follows:

PRIORITY I	Market, advertise and promote the area's resources
PRIORITY II	Make what the Valley has, work better
PRIORITY III	Develop the area's biggest resources and/or tourist activities (skiing, fishing and outdoor recreation)
PRIORITY IV	Create additional reasons for people to come to the Valley and to stay.

As we have outlined in the previous chapters, the Comox Valley has a diverse and high quality base of tourism resources. These resources include natural, man-made, human and heritage.

Markets are also varied although the most consistent factors include family unit or adult couples, skiing or fishing oriented, from fairly close-in markets, casually taking part in other recreation pursuits, traveling by automobile or R.V.; and staying only a short time.

PRIORITY I - Marketing/Promotion

Marketing or selling the Comox Valley as it currently exists is a fundamental component of our strategy. As obvious as it sounds, improved marketing will undoubtedly create the best overall financial return and have the largest impact on increasing tourism volumes.

It requires no capital investment, can be implemented relatively quickly and the basic mechanism is already well established. Based on the established market base, volumes of pass-through traffic, existing awareness of the Valley, and the favorable reaction of those who "discover" the Valley for the first time, increased marketing can offer relatively rapid and sustained tourism improvements.

It can be targetted to specific sectors (fishing, diving, hiking etc.) and to specific seasons. Marketing can also be aimed at specific market segments (families, empty nesters etc.) to match the facilities.

To ensure an expanded, targetted and comprehensive marketing program, the following is recommended:

- endorse and support Tourism Comox Valley as the marketing delivery vehicle
  - develop a three year marketing program
  - increase the contributions to Tourism Comox Valley by local government, the private sector and Partners in Tourism
  - measure marketing results.
-

PRIORITY II - Improve What the Valley Already Has

A key element of a tourism strategy is to keep it as simple as possible and to make the recommendations cost-effective. Often this involves a series of actions, which on their own do little to effect change, but as a group, can make a considerable difference.

These are the non-development, non-marketing activities such as transportation, signage, and thematic treatments. These can do a great deal to improve access to the Valley as well as creating continuity and a Valley identity. These can be particularly useful in providing a reason for pass-through traffic to stop, for causing an extra day's stay and for generating new destination-oriented tourism.

Exhibit 7.11 presents a description of the issues, their current status and the recommended action.

EXHIBIT 7.11

COMOX VALLEY STRATEGY FOR EXISTING TOURISM ISSUES

ISSUE	DESCRIPTION	ACTION
Signage	<ul style="list-style-type: none"> <li>- Existing direction signage is sparse, confusing and inconsistent</li> <li>- Provides no continuity</li> <li>- Informational signage is varied quality</li> </ul>	<ul style="list-style-type: none"> <li>Develop a signage program for directional and information signs</li> <li>Create an overall theme for the Valley</li> <li>Solicit industry/local government endorsement</li> <li>Solicit provincial government support</li> <li>Develop a southern gateway, "Welcome to the Comox Valley" sign and rest area</li> </ul>
Events	<ul style="list-style-type: none"> <li>- A large and diverse series of events are staged</li> <li>- Success ranges from good to excellent</li> <li>- Proven market</li> <li>- Relatively cost effective form of tourism development</li> </ul>	<ul style="list-style-type: none"> <li>Establish the Valley's roster of events as prime tourism generators</li> <li>Coordinate their timing and delivery to maximize tourist patronage</li> <li>Develop new events to fill in available gaps</li> </ul>
Themes	<ul style="list-style-type: none"> <li>- Specific themes appear well suited to at least two municipal areas</li> <li>- Themes offer proven tourism potential</li> <li>- Themes are relatively inexpensive to develop</li> </ul>	<ul style="list-style-type: none"> <li>Develop a Valley-wide slogan and theme</li> <li>Tie it into the individual municipal theme</li> <li>Solicit industry, public and local government support</li> <li>Promote</li> </ul>
Transportation Highway	<ul style="list-style-type: none"> <li>- Congested, mainly two lane, winding highway, north of, Parksville</li> <li>- Causes real and perceived access problems</li> </ul>	<ul style="list-style-type: none"> <li>Develop a Valley consensus on improving the existing highway or building a four-lane inland highway</li> <li>Promote with Provincial government</li> </ul>
Rail	<ul style="list-style-type: none"> <li>- VIA Rail operates a very scenic commuter train between Victoria and Courtenay</li> <li>- Schedule timing and number of departures</li> <li>- Train station is unmaintained</li> </ul>	<ul style="list-style-type: none"> <li>Pressure VIA Rail to maintain and improve service</li> <li>Develop a ski train</li> <li>Improve Courtenay train station</li> </ul>
Marine	<ul style="list-style-type: none"> <li>- Summer congestion causes delays at Powell River-Comox and Denman-Hornby</li> <li>- Price of R.V./boat trailer access to Vancouver Island is a deterrant</li> </ul>	<ul style="list-style-type: none"> <li>Increase capacity as required</li> <li>Work to disperse peaks</li> <li>Work with B.C. Ferries to control costs</li> </ul>
Air	<ul style="list-style-type: none"> <li>- Airpark at Courtenay used for private planes</li> <li>- CFB Comox used for scheduled carriers</li> <li>- Charters and larger private can not be adequately handled</li> </ul>	<ul style="list-style-type: none"> <li>Work with CFB Comox to improve civilian use of airport facilities</li> <li>Work with CFB Comox to establish a new joint military/ DOT airport terminal</li> <li>Improve the Courtenay airpark</li> </ul>
TOURS	<ul style="list-style-type: none"> <li>- Variety of interesting and unique scenery</li> <li>- Most is visible <u>off</u> the main highway</li> <li>- Several natural circle tours exist</li> </ul>	<ul style="list-style-type: none"> <li>Develop and promote circle driving tours of different parts of the Comox Valley</li> <li>Coordinate with a coupon program for discounts on meals, merchandise etc.</li> <li>Develop additional scenic viewpoints.</li> </ul>



PRIORITY III - Develop the Valley's Proven Markets and Resources

Tied partly to the marketing strategy is the recommendation to develop and focus attention on the area's key tourism oriented resources. Since proven markets exist for the Valley's key resources, and they offer expansion potential, they should be further developed.

Basing future tourism growth on these established markets provides an element of confidence or security in the future not possible if the strategy was based entirely on developing new markets or new facilities.

Exhibit 7.12 describes the development issue or focus, a description of its current status, and the recommended action required.

<u>ISSUE</u>	<u>DESCRIPTION</u>
Skiing	The two largest ski areas on Vancouver Island Skier visit totals second only to Whistler-Blackcomb Generally abundant snow falls Captive Vancouver Island skier market
Fishing	Salmon volumes and effort ratios similar to the Campbell River area Improving success of enhancement programs/hatcheries Easily accessible fishing areas
Waterfront Opportunities	- Undeveloped, prime urban waterfront locations Long coastline of rural land Excellent estuary
Boating	- Very fine inside passage, enclosed boating waters - Staging/service area for desolation sound - Northern extremity of the gulf island
Diving	- Excellent diving waters for clarity and variety of marine life - Established local market - Small visitor market
Hiking	- Excellent network of high elevation trails exist with road access - Valley bottom trails are less extensive
Racing	- Existing Saratoga Raceway has a stable market - Markets could be increased with improved facility and greater range of events

PRIORITY IV - Create New Visitor Activities/Facilities

Evolution of the Comox Valley tourism strategy has been from marketing and the improvement of several non-development oriented issues, to development/expansion of the Valley's proven markets and resources. The final phase in our ten-year strategy is the creation of new markets and new developments. These aspects of the strategy are designed to augment the existing markets and resources while addressing the basic objectives of the plan.

Although we have allocated this category of strategy issues as fourth priority, it does not necessarily mean that all the individual items under the first three priority categories be done first. Some overlapping among the categories is inevitable and desirable.

This category focuses on actual facility development and consequently, many of these projects will take longer to implement. We have intentionally grouped them together to illustrate that the basic amenities and resources for a successful tourism sector already exist, and considerable improvement can be made by improving the performance of the existing facilities.

It is this facility performance improvement issue that links the earlier priorities with Priority IV since most of our recommendations here are attractions or travel generators. These are intended to entice people to visit the Valley, and consequently, to provide patrons for the existing accommodation, food service, recreation and entertainment facilities.

EXHIBIT 7.13  
COMOX VALLEY DEVELOPMENT PROSPECTS

ISSUE	<u>DESCRIPTION</u>	<u>ACTION</u>
Commercial Attraction(s)	Comox Valley has no dedicated tourist attraction Family market and lack of things to do for children offer potential	- Analyse market and financial potential for a visitor attraction Develop an attraction if feasible
Marine Resort(s)	Comox Valley has nearly 100km of coastline and only one water oriented accommodation property Resorts with full facilities can be generators of traffic	Proceed with the Comox marine hotel Determine developer interest in a small resort/lodge on Denman or Hornby Island
Equestrian Facilities	Horse related activities appeal to equestrian and more general market Existing facilities include the fairgrounds and Bear Creek Ranch Opportunities exist to expand one or both to include regional equestrian events	Review development options for equestrian functions Determine market appeal Develop facility(ies)
Arts and Cultural Facility (Note: see Appendix E for more detailed description)	Large concentration of artistic talent Limited suitable facilities Opportunity to generate tourism with professional tour acts	- Organize the arts community under one umbrella group - Conduct a detailed feasibility assessment of the facility - Secure funding (if feasible) - Develop facility
R.V. Park	Large proportion of in-transit R.V.'s through the Valley No convenient place to stay	- Encourage existing R.V. Parks to service this market - If not, develop a new facility near downtown Courtenay, visible from highway
Native Involvement with Tourism	Native interest in economic development and jobs Strategic location and lack of development on reserve lands	- Encourage native interest in tourism development - Review feasible development options - Develop facility(ies)

## 8.0 MAKING IT WORK

Implementing tourism strategies at the local or regional level has typically had mixed success in British Columbia and has been the downfall of earlier attempts at strategic planning. The reasons for this occurrence are varied, but there are several common elements.

One reason seems to be caused by the size and diversity of the tourism industry and the fact it crosses into so many other economic sectors and cannot be neatly categorized. Consequently, responsibility for managing and directing the industry's development is deferred to a series of different organizations or agencies, often without a clear mandate.

Another common failing has been the lack of political will to implement, both at the local level and by senior governments. At the local level this appears to have occurred either because there was no clear implementation path to follow; jurisdictional disputes; higher priorities for council attention; lack of cooperation/agreement among council or councils; confrontational pressure by other interest groups; or because of a lack of financial commitment. At the senior government level, there are a series of additional factors influencing their ability or desire to assist with implementation. These include the facts that: financial assistance is often not forthcoming to assist the development process; concerns are expressed about setting precedents; their objectives are often different; or conflicting mandates among ministries.

A third issue has been the lack of an organization, agency or individual charged with the responsibility of implementing or overseeing the strategy. Typically, the role, by default rather than by intention, is deferred to a Chamber of Commerce, Economic Development Commission or committee of council. Often the mandates are not clear, conflicts exist with other organizations and budgets are not sufficient to do the job. A key aspect of failure of strategy/implementation from an organization perspective is the authority to implement does not accompany the mandate to implement.

A fourth common aspect is the lack of a clear, concise game-plan that sets out achievable results. Often the goals are set too high or action depends on too many outside, uncontrollable factors. Consequently, the initial enthusiasm declines and progress suffers.

Another common problem is implementation budgets (or lack of budgets). Progress implementing a tourism plan can often only be fairly assessed after a period of years, perhaps up to three or four years. Often, local jurisdictions are more inclined to look for a quick fix and do not put the necessary time or financial support behind the industry.

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A final common failing is the lack of a mechanism to monitor success of the plan. Without this process, neither the agency charged with implementation responsibilities nor the local councils have defensible records of the programs success. Without this success monitor, providing future support can be difficult.

### 8.1 Organizational Structure

As discussed above, a key ingredient for success of a tourism strategy is the right organization to implement the plan. In this section we review the roles, responsibilities and objectives of the ideal coordinating organization, while matching this with the mandates of existing organizations.

The overall function that needs to be addressed is the coordinating and fostering of marketing and development of the tourism industry in the Comox Valley. Specific activities that need to be considered are:

- creation of local awareness of tourism importance
- developing cooperation among geographic areas and other agencies representing tourism
- external marketing
- visitor information services
- development assistance
- liaison between the tourism industry, the community and the government(s).

Due to the tourist industry's multi-faceted and fragmented nature, coordinating activities is particularly difficult. However, a successful tourism sector requires efficient organization, coordination and management.

No single organization can be identified in advance, or without knowledge of the existing organizational structures, as each community is different and has different requirements. The objective is to give these responsibilities to the most suitable organization(s), given knowledge of the existing organizational and political structure.

In the Comox Valley, the two organizations most directly connected with tourism activities are Tourism Comox Valley and the Comox Valley Chamber of Commerce. Currently, Tourism Comox Valley is responsible for external promotion as its main responsibility. The Chamber of Commerce provides internal promotion or visitor information services, and assistance to developers. Both groups attempt to bolster the profile of tourism, provide liaison among government and the private sector, and foster cooperation.

There is not a perfect model to duplicate or to provide a pattern for the Comox Valley because the examples that exist (at least those in B.C.) have evolved to suit specific, local needs. There are, however, three common structures in existence. These are the Chamber of Commerce approach (Parksville), the Visitors and Convention Bureau (Penticton), and the dedicated tourism organization (Tourism Victoria). All have their merits depending on their environment, level of support, budgets and mandate. In fact, these options can often be the evolution process a community goes through in structuring an organization to suit its needs.

Another common element of successful tourism organizations is that they are built from within, based on the needs of the community and the industry, and are not superimposed by any outside agency. Consequently, we are somewhat reluctant to recommend an actual organization since the act of recommending it, may doom it to lack of support and subsequent failure.

However, in our opinion, the Comox Valley should work towards establishing a single tourism organization with the following structure:

- charge one organization with the responsibility for all tourism activity, particularly marketing and visitor services.
- consolidate these activities in a Tourism Comox Valley type structure, but with a broader mandate.
- create a board of directors with a broad representation comprised of influential tourism industry and special interest group representation.
- alleviate the Comox Valley Chamber of Commerce of its visitor service role and transfer this to Tourism Comox Valley.
- charge the Comox Valley Chamber of Commerce with development responsibility in terms of seeking private sector development and coordinating government investment.
- increase the financial contributions from the three municipalities and start an allocation from the regional district, based on a per capita assessment.
- formalize the loose structure utilized in the preparation of this strategy where-by a member of council from the three municipalities was appointed/selected to represent the interests of each community. Broaden this membership to include one representative from the regional district Comox Valley Committee and the Islands Trust.

create a broad industry membership base and generate revenue on a project by project basis with corporate support and fee-for-service projects.

consolidate both activities at the existing visitors information centre in Courtenay.

The benefits to this organizational structure include:

taking the financial burden and time commitment off the Chamber of Commerce so they can devote a more proportional amount of effort to other non-tourism Chamber functions.

eases the problems and hopefully unites the Valley Chambers of Commerce, business associations and ratepayers associations, and provides a more cohesive tourism voice.

provides a single agency soliciting private sector and public sector financial support for tourism marketing and information services.

## 8.2 Roles and Responsibilities

A wide variety of organizations, groups and companies will necessarily be involved in the implementation process associated with tourism industry expansion. The important roles which should be played by the municipal jurisdictions were discussed above. Each also should undertake responsibilities for initiating, promoting and expediting implementation of specific projects as defined in the preceding chapter. On the other hand, some recommendations described in the preceding chapter are more appropriately pursued by other organizations or by the private sector. Under these circumstances, the role of the communities should be limited to promoting awareness and ensuring that implementation is consistent with overall tourism development objectives.

An evaluation of the specific recommendations which comprise the tourism development strategy was carried out relative to those organizations which should undertake primary or secondary responsibility for their implementation. Furthermore, organizations which should play a supporting role in each case were identified.



The variety of organizations which were included in this evaluation process are listed below:

- City of Courtenay
- Town of Comox
- Village of Cumberland
- Regional District of Comox-Strathcona
- Islands Trust
- Provincial Government
- Federal Government
- Tourism Comox Valley
- Chamber of Commerce
- Tourism Association of Vancouver Island
- Special Interest Groups
- Private Sector
- External Advisors.

A role exists in some areas for all of these organizations. It is important to recognize that none can ensure successful implementation of the overall strategy on their own. Ongoing and extensive communication and cooperation is essential to achieving the goals and objectives which are consistent with the recommended tourism development strategy.

Exhibit 8.1 summarized the level of responsibility which each of these groups should accept during the implementation process. Levels of responsibility are indicated by the following abbreviations:

- - primary responsibility;
- - secondary responsibility; and
- - support to project initiators/expediters.

It should be noted that responsibility levels are suggestions only which were established throughout the analysis and at the conclusion of this study. All organizations should be sufficiently flexible to take action as circumstances dictate. While responsibilities described were realistic at the time this document was prepared, jurisdictional control, financial capability, funding programs or corporate fortunes may necessitate that role changes take place in the future. The implementation process, as is the case with the recommended strategy, must be flexible to adjust to a changing and evolving environment.

EXHIBIT 8.1  
ROLES AND RESPONSIBILITIES

	City of Courtenay	Town of Comox	Village of Cumberland	R.D. of Comox Strathcona	Islands Trust	Economic Development Commission	Provincial Government	Federal Government	Tourism Comox Valley	Chamber of Commerce	Tourism Assoc. of Vanc. Is.	Special Interest Group	Private Sector	
<u>ADMINISTRATION</u>														
Improve awareness of tourism	.	.	.	.	.	.	0	.	.	0	0	0	.	
Improve municipal involvement	•	•	•	0	0	0	0	.	•	0	0	0	.	
Coordinate event timing	0	0	0	.	.	.	.	.	.	.	.	.	.	
Marketing and Promotion	.	.	.	.	.	.	.	.	•	.	•	.	•	(3)
Hospitality Training	.	.	.	.	.	.	.	.	•	.	.	.	•	(1)
Skill Training	.	.	.	.	.	.	.	.	•	.	.	.	•	(1)
Developing private sector interest	.	.	.	.	.	•	0	.	0	•	.	.	0	(2)
Tourism facility-planning/zoning	•	•	•	•	•	0	.	.	•	.	.	.	.	
Improve industry cohesion	.	.	.	.	.	0	.	.	.	.	.	.	.	
Tourism financial assistance	0	0	0	0	.	.	•	•	•	.	.	.	•	
Tourism performance monitoring	.	.	.	.	.	.	0	.	•	•	.	.	0	0(1)
Visitor services	.	.	.	.	.	.	0	.	•	0	.	.	0	
<u>VALLEY WIDE DEVELOPMENT</u>														
Signage	•	•	•	0	0	0	•	.	.	.	.	.	.	0(3)
Skiing	.	.	.	.	.	.	0	.	.	.	.	.	•	
Fishing	.	0	.	0	0	.	.	0	.	.	.	.	0	
Arts and Culture	•	.	.	.	.	.	.	0	0	.	.	.	0	
Waterfront Development	•	•	.	0	•	0	.	0	.	.	.	.	0	
Events	0	0	0	.	.	.	.	.	0	.	.	•	0	
Downtown Revitalization	•	•	•	.	.	0	0	.	0	•	.	.	0	
Theming	0	•	•	.	.	.	0	.	0	0	.	.	0	(4)
Transportation	•	•	0	•	.	•	•	.	0	•	0	.	0	D(5)
Outdoor Recreation	.	.	.	•	0	.	.	.	.	.	.	.	•	(6)
Parks	.	.	.	•	•	.	0	.	.	.	.	.	.	
Attractions	.	.	.	.	.	.	0	.	0	.	.	.	•	
Gateway information	.	.	.	0	.	.	0	.	0	.	.	.	.	
<u>COMOX</u>														
Signage	.	•	.	.	.	.	0	.	.	.	.	.	0	
Waterfront Development	.	•	.	.	.	.	.	.	.	.	.	.	0	
Downtown Development	.	•	.	.	.	.	0	.	.	0	.	.	0	
Military attraction	.	•	.	.	.	0	.	0	.	.	0	.	0	0(4)
Marketing	.	•	.	.	.	.	.	.	•	.	.	.	.	

LEGEND : • primary responsibility/ 0 secondary responsibility/ . lend support

"Other" agency responsibility

- (1) North Island College
- (2) Economic Development Commission
- (3) Outside advisors
- (4) CFB Comox
- (5) VIA Rail
- (6) B.C. Ferries

	City of Courtenay	Town of Comox	Village of Cumberland	R.D. of Comox-Strathcona	Islands Trust	Economic Dev. Commission	Provincial Government	Federal Government	Tourism Comox Valley	Chamber of Commerce	Tourism Assoc. of Vanc. Is.	Special Interest Group	Private Sector	Other
<u>COURTENAY</u>														
Signage	•••••					•••••	•••••							
Waterfront Access/development	•••••					•••••	•••••	•••••						
Downtown development	•••••					•••••	•••••	•••••						
Arts/Cultural Centre	•••••					•••••	•••••	•••••				•••••		
Attraction(s)	•••••	•	•	•	•	•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Events	•••••					•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Retail/Service development	•••••					•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
<u>CUMBERLAND</u>														
Signage			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Heritage redevelopment			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Events			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Comox Lake development			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Downtown redevelopment			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
Retail/Service development			•••••			•••••	•••••	•••••	•••••	•••••		•••••	•••••	•••••
<u>HORNBY AND DENMAN ISLAND</u>														
Marine development					•								•	
Events					•								•	
Arts/Crafts Centre					•								•	
Resort/Accommodation					•								•	
Parka					•								•	
Tours/Access					•								•	
Signage					•								•	
<u>RURAL AREAS</u>														
Skiing					•								•	
Fishing					•								•	
Outdoor Recreation					•								•	
Marine facilities					•								•	
Accommodation					•								•	
Cruise ships	•	•			•								•	
Signage					•								•	

LEGEND : • primary responsibility o secondary responsibility/ . lend support

### 8.3 Monitoring Performance

The following chapters have described recommended techniques to expand the tourism industry, and increase the volume and value of tourism in the Comox Valley. A critical component of the process is to monitor success of the strategy's implementation. This stage is necessary and essential to modify the plan if new circumstances arise and to be able to document actual performance to industry and government.

Evaluation is a very important step in the process because it measures industry success toward achieving its goals and objectives. Evaluation will detect both contributing and distracting factors which have bearing on the tourism program's progress.

Evaluation must be consistent and ongoing to be effective. Evaluation reports must be prepared during initial phases of tourism development and be supplemented on a regular basis. Ongoing evaluation allows detection of weaknesses in plans which may cause problems if not discovered early. Detection of such weaknesses provides for corrective action before problems become unmanageable. Maintaining continued evaluation also provides a present base for comparison with prior evaluation and serves as a basis for forecasting future patterns and trends.

Evaluation will also detect weaknesses in the plan or detect the effects of changes in circumstances, as the implementation timeframe progresses.

Monitoring tourism growth can be accomplished by two separate approaches or by a combination of the two. These techniques involve measures of supply of tourism facilities and the demand for these facilities.

Measuring the demand side involves monitoring the visitors themselves. This can be a costly and time consuming technique if conducted thoroughly, but the considerably scaled down version recommended here can provide reliable, one-time visitor information and trend details if monitored over time.

Measuring the supply side involves acquiring information from industry operators and is generally simpler, quicker and cheaper to obtain. It does, however, rely on maintaining the confidentiality of individual business statistics.

The following are the recommended approaches which are deemed sufficient to document results and record progress. They are also cost-efficient and can be implemented by the existing organizations.

DEMAND MEASURES:

Record all personal, telephone and mail enquiries to the information centre office.

Record the type of enquiry as to what information was requested, i.e. fishing, accommodation, attractions etc.

Institute a summer and winter self-administered questionnaire survey for hotel, motel and campground guests. It should cover a complete sample over a relatively short period of time, computer coded for seasonal and annual comparisons. Design advice should be sought from the properties supplying information to ensure their information needs are being met.

Track these survey results over time and monitor changes.

Compare these results with tourism statistics from the Ministry of Tourism, Recreation and Culture.

Convey the results to the industry and government on a regular basis.

SUPPLY MEASURES:

Solicit occupancy information from hotels, motels and campgrounds. Support this information with estimates of purpose of trip (business or pleasure), length of stay and origin. This is the most complete and most readily available measure of industry performance, and its confidential nature should be carefully guarded to protect the information about individual operators.

As an alternative to having this information recorded by the Chamber of Commerce or Tourism Comox Valley, Canada Manpower or North Island College are likely candidates.

Track ferry loadings on the Comox-Powell River ferry.  
(Source: B.C. Ferry Corp.)

Monitor charter flights into CFB Comox (Source: CFB Comox)

Monitor VIA Rail arrivals in Courtenay (Source: VIA Rail)

Monitor skier-visits at the two ski areas. (Source: Forbidden Plateau and Mt. Washington)

Encourage the Fishing Guides Association to track their member's charter activities in terms of number of charters and guest origin.

COMPARISONS:

The above information allows progress to be tracked within the Comox Valley. Relative comparisons of the Comox Valley to others, particularly on Vancouver Island. Regular contact should be maintained with the areas immediately to the north and south - Campbell River and Parksville/Qualicum respectively to track central Vancouver Island statistics.

A monthly monitor should also be established with Tourism Victoria since they are the major information center on Vancouver Island.

The final level of comparisons should be the B.C. Tourism Indicators published monthly by the Research Division of the Tourism, Recreation and Culture Ministry. This time series provides information on U.S. border crossings, B.C. Ferry loadings, hotel occupancies, restaurant sales and information centre enquiries.

APPENDIX

COMOX VALLEY TOURISM STRATEGY

COMMUNITY INTERVIEWS

---

Name:	_____	Address:	_____
Affiliation:	_____		_____
Phone:	_____	Date:	_____

---

1. **What** do you feel are tourism's main strengths or assets in:

- your community? \_\_\_\_\_
- \_\_\_\_\_
- the Comox Valley? \_\_\_\_\_
- \_\_\_\_\_

2. **What** are the main weaknesses or problem areas in:

- your community? \_\_\_\_\_
- \_\_\_\_\_
- the Comox Valley? \_\_\_\_\_
- \_\_\_\_\_

3. **What** are the main tourism issues in:

- your community? \_\_\_\_\_
- \_\_\_\_\_
- the Comox Valley? \_\_\_\_\_
- \_\_\_\_\_

4. **What** tourism trend changes have you noticed in the past 4-5 years regarding

- visitor origins? \_\_\_\_\_
- length of stay? \_\_\_\_\_
- no. of visitors? \_\_\_\_\_
- seasonality? \_\_\_\_\_
- other? \_\_\_\_\_

5. **What** are the main tourism development opportunities in:

- your community? \_\_\_\_\_
- \_\_\_\_\_
- the Comox Valley? \_\_\_\_\_
- \_\_\_\_\_



6. what could be done to develop tourism in the area by season?

Spring: \_\_\_\_\_

Summer: \_\_\_\_\_

Fall: \_\_\_\_\_

Winter: \_\_\_\_\_

7. What themes, activities or facilities could form the basis of future tourism development (i.e. heritage, fishing, skiing etc.)?

\_\_\_\_\_

\_\_\_\_\_

8. How would you rank the following tourism issues or services in the Comox Valley? Ranking from 1 - 5, with five being the highest or best score and 1 the worst.

Variety of accommodation	1	2	3	4	5
Quality of accommodation	1	2	3	4	5
Scenic Appeal	1	2	3	4	5
Man-made attractions	1	2	3	4	5
Level of hospitality	1	2	3	4	5
Directional Signage	1	2	3	4	5
Highway access	1	2	3	4	5
Variety of restaurants	1	2	3	4	5
Tourism marketing	1	2	3	4	5
Tourism industry organization	1	2	3	4	5
Variety of activities (things to do)	1	2	3	4	5
Beaches	1	2	3	4	5
Air access	1	2	3	4	5
Shopping	1	2	3	4	5
Waterfront development	1	2	3	4	5

9. What other suggestions do you have for improving tourism in the Comox Valley?

\_\_\_\_\_

\_\_\_\_\_

10. What do you think should be government's role in improving tourism in the Comox Valley? (Considering local, provincial and federal governments) \_\_\_\_\_

\_\_\_\_\_

11. What are you expecting to come out of this tourism development plan?

\_\_\_\_\_

\_\_\_\_\_

APPENDIX B

ConsumerScope  
 Summer '86  
 CS86-225 "  
 RESPONDENT NO.:

1. Have you heard of an area on Vancouver Island called the Comox Valley?  
 Yes ..... 1  
 No ..... 2 131
2. The Comox Valley includes the communities of Courtney, Cumberland, and Comox. Have you ever visited this area?  
 Yea ..... 1  
 No ..... 2 132  
**GO TO Q.7**
3. And have you ever stayed overnight in the area?  
 Yea ..... 1 133  
 No ..... 2 1
4. When was your last visit to the Comox Valley?  
**RECORD YEAR:** 19 \_\_\_\_\_ m 134  
**OTHER RESPONSE:** \_\_\_\_\_ 135

**IF STAYED OVERNIGHT (Yes in Q.3) ASK Q.5, OTHERWISE GO TO Q.6**

- 5a. And when was the last time you stayed overnight in the Comox Valley?  
**RECORD YEAR:** 19 \_\_\_\_\_ 136  
**OTHER RESPONSE:** \_\_\_\_\_ 137

- b. And what type of accommodation did you use when you stayed overnight?  
**DO NOT READ**
- |                       |     |            |
|-----------------------|-----|------------|
| Hotel .....           | .01 | 138<br>139 |
| Motel .....           | .02 |            |
| R.V. Park .....       | .03 |            |
| Camp .....            | .04 |            |
| Friend's Home .....   | .05 |            |
| Relative's Home ..... | .06 |            |
| Other (specify) ..... | .07 |            |

6. Now I'm going to read a number of activities. Please tell me if you participated in any of these activities during any of your visits to Comox Valley?
- |                                      | <u>Yes</u> | <u>No</u> |     |
|--------------------------------------|------------|-----------|-----|
| READ Snow Skiing .....               | 1          | 2         | 140 |
| Sliding .....                        | 1          | 2         | 141 |
| Fishing .....                        | 1          | 2         | 142 |
| Sightseeing .....                    | 1          | 2         | 143 |
| Visiting Friends and Relatives ..... | 1          | 2         | 144 |
| camping .....                        | 1          | 2         | 145 |
| Attending Festival or Event .....    | 1          | 2         | 146 |
| Beach Activities .....               | 1          | 2         | 147 |

7. And when you think about the Comox Valley what first comes to mind?  
 \_\_\_\_\_ 148  
 \_\_\_\_\_ 149  
 \_\_\_\_\_ 150  
 \_\_\_\_\_ 151  
 \_\_\_\_\_ 152

**GO TO NEXT QUESTIONNAIRE OR DEMOGRAPHICS**

The telephone survey involved 502 interviews with randomly selected respondents in Greater Vancouver. The verbatim questions as they were asked together with the percentage responses are recorded below.

1. Have you heard of an area on Vancouver Island called the Comox Valley?

BASE	502
Yes	78%
No	23%

2. The Comox Valley includes the communities of Courtenay, Cumberland, and Comox. Have you ever visited this area?

BASE	502
Yes	56%
No	44%

3. And have you ever stayed overnight in the area?

BASE (Those who had visited)	282
Yes	63%
No	37%

BASE (All Vancouver residents)	502
Yes	34%
No	66%

4. When was your last visit to Comox Valley?

BASE	282
1979 or less	26%
1980	3%
1981	9%
1982	11%
1983	6%
1984	16%
1985	13%
1986	16%

- 5a. And when was the last time you stayed overnight in the Comox Valley?

BASE	178
1979 or less	24%
1980	4%
1981	8%
1982	14%
1983	6%
1984	13%
1985	14%
1986	17%

5b . And what type of accommodation did you use when you stayed overnight?

BASE	178
Hotel	17%
Motel	23%
R.V. Park	2%
Camp	12%
Friend's Home	24%
Relative's Home	14%
Other	9%

6. Now I'm going to read a number of activities. Please tell me if you participated in any of these activities during any of your visits to Comx Valley?

BASE	282
	<u>% responding "yes"</u>
Snow Skiing	12
Swimming	32
Fishing	30
Sightseeing	69
Visiting Friends and Relatives	45
Camp ing	28
Attending Festival or Event	18
Beach Activities	42

7. And when you think about the Comox Valley, what first comes to mind?

BASE	502
Beautiful Scenery/Landscape	16%
Nothing/Just Drove Through	14%
Air Force Base	12%
Fishing/Fishing Areas	11%
Don't Know/Never Been There	9%
Beach/Water, Coastline, Ocean Front	7%
A Nice/Pleasant Place to Visit	7%
Logging/Trees/Forest	6%
Quiet/Peaceful	6%
Friends/Relatives Live There	6%
It's on Vancouver Island	6%
Comox and Area	5%
Small Town/Community/ Rural/Farming	4%
Other Outdoor Activities	4%
Skiing/Good Skiing	3%

DEMOGRAPHICSSummer '86

<u>BASE</u>		502
		<u>%</u>
<u>Sex of Respondent</u>	Male	50
	Female	50
<u>Age of Respondent</u>	18-24	15
	25-34	30
	35-44	23
	45-54	11
	55 and Over	22
<u>Marital Status</u>	Single	32
	Married	55
	Other	13
	Refused	1
<u>Education</u>	High School or Less	40
	Post Secondary	24
	University	35
<u>Area Within G. V.R. D.</u>	Vancouver	32
	North Shore	10
	Burnaby/New West/East to Maple Ridge	25
	Richmond/Delta	12
	Surrey/White Rock/Langley	21
<u>Total Household income</u>	Less Than \$15,000	11
	\$15,000-\$24,999	17
	\$25,000-\$34,999	21
	\$35,000-\$44,999	11
	\$45,000 or More	23
	Refused/Don't Know/Not Stated	17
<u>Number of People in Household</u>	One	18
	Two	34
	Three	20
	Four	19
	Five	6
	Six	3
	Seven	1
	Refused/Not Stated	1





HOTEL/MOTEL/RESORT ACCOMMODATIONS

<u>NAME</u>	<u>TYPE</u>	<u>LOCATION</u>	<u>UNITS</u>	<u>RATES</u>	<u>FACILITIES/SERVICES</u>		
PACIFIC VILLAGE	Motel	Panny Bay	10	38.00			
BEACH GROVE	Cabins	t. Holmes	4	320-380 (Wk.)			
KYE BAY LODGE	Lodge	Kye Bay	9	275-325 (Wk.)			
ALDER'S BEACH	Cabins	Merrillie	17	60-85 (Db1.)			
MIRACLE BEACH	Cabins	Black Creek		40 (Db1.)			
COUNTRY COMFORT	B & B	Black Creek	2	40			
BEACH HOUSE	B & B	Kitty Coleman	2	35			
CATHAY RESORT	Motel	Kye Bay	18	35-45 (Db1.)			
					<b>Recreation</b>		
						Indoor Pool	
						Outdoor Pool	
						Sauna/Hot tub/Swirl	
						Games Room	
						Tennis	
						<b>Hospitality</b>	
						Restaurant	
					X	Coffee Shop	
						Lounge	
						Pub/Cabarets	
						Meeting Rooms (no. of rooms, size of largest, total capacity)	
						Housekeeping Units	
						X	
						<b>Traveler Service</b>	
						Credit Cards	
					X	Chain Affiliation	
						Air Conditioned	
						Travel Agents Comm.	
						Wheelchair Access	
					X	Gift Shop/Store	





HOTEL/MOTEL/RESORT ACCOMMODATIONS

<u>NAME</u>	<u>TYPE</u>	<u>LOCATION</u>	<u>UNITS</u>	<u>RATES</u>	<u>FACILITIES/SERVICES</u>																	
					<u>Recreation</u>				<u>Hospitality</u>				<u>Traveler Services</u>									
					Indoor Pool	Outdoor Pool	Sauna/Hot tub/Swirl	Games Room	Tennis	Restaurant	Coffee Shop	Lounge	Pub/Cabarets	Meeting Rooms (no. of rooms, size of largest, total capacity)	Housekeeping Units	Credit Cards	Chain Affiliation	Air Conditioned	Travel Agents Comm.	Wheelchair Access	Gift Shop/Store	
DENNAN ISLE GUEST HOUSE	B & B	Denman	5	\$ 30.00								X										
SEA CANARY GUEST HOUSE	& B	Denman	5	30-40.00								X										
SEA BREEZE LODGE	Cabins	Hornby	11	110-144					X	X											X	X
FORD'S COVE MARINA	Cabins	Hornby	6	45.00																	X	X
WOODLANE	B & B	Hornby	2	35.00																		
SANDPIPER RIDGE	Lodge	Hornby	4	50-90.00								X										
HERITAGE	& B	Denman	2	35.00																		
MT. WASHINGTON SKI RESORT	Rental Condo's	On Mountain	45	298-560.00			X	X		X	X	X			X							X

## APPENDIX D

CAMPGROUNDS

NAME	LOCATION	NO. OF SITES	SERVICES			RATES
			S	P	W	
PACIFIC PLAYGROUNDS	Saratoga	210	x	x	x	\$11-15.00
DICK & DI's	Saratoga	20	x	x	x	10.00
SARATOGA BEACH T & T	Saratoga	23	x	x	x	12.00
MIRACLE BEACH	Black Creek	B4	x	x	x	10-15.00
MIRACLE BEACH PROVINCIAL PARK	Black Creek	195				10-15.00
SEA-ESTA CAMPGROUND	Black Creek	22	x	x	x	12.00
BATES BEACH	Seal Bay	30	x	x	x	10-11.00
KITTY COLEMAN	Merville	35			x	4.00
KING COHO	Little River	35	x	x	x	14.00
KIN BEACH	Little River	15			x	4.00
KYE BAY	Kye Bay	10				
SEAVIEW TENT & TRAILER	Pt. Holmes	63	x	x	x	7-9.00
COMOX LAKE CAMPGROUND	Cumberland	50		x	x	6-8.00
MAPLE POOL	Courtenay	40	x	x	x	7-9.00
MANSFIELD DRIVE	Courtenay					
LAKELANDS	Denman	10			x	8-12.00
FILLONGLEY PARK	Denman	10				8.00
FORD'S COVE	Hornby	10	x	x	x	10.00
BRADSDADSLAND CAMPSITE	Hornby	50	x	x	x	10-14.00
TRIBUNE BAY	Hornby	120			x	12-14.00
HORNBY ISLAND RESORT	Hornby	20	x	x	x	10.00

S = Sewer

P = Power

W = Water

HISTORY OF THE COMOX VALLEY

The Courtenay region was the site of a large Indian community of the Comox tribe and the Puntlach tribe before settlement by white people. Puntlach village was up-river a short distance from Courtenay. The other tribe, the Komoux (Comox) dwelt by the bay. This settlement was named Komoux, which meant 'land of plenty' because the area contained an abundance of fish, game, and berries.

In the 1850's, a Hudson's Bay store was established and settlement by white people began in the 1860's. The first settlers included miners who were attracted to the area while journeying from California to the Cariboo gold strike.

In 1860, the name of the settlement was changed from Port Augusta to Courtenay in honour of an officer who served on the ship HMS Constance. This ship was responsible for the first survey of the area and the east coast of Vancouver Island during the period 1846 to 1849.

During the decade of the 1870's, the settlement developed with the construction of a church and school. The economy at this time was based primarily on agriculture and the logging industry. The Lorne Hotel was built in 1875 and is considered to be the oldest hotel still in use north of Nanaimo.

In the 1880's, with the development of the agricultural industry, a herd of Jersey-cattle was imported and an important market for produce was provided with the opening of a coal mine near Cumberland.

The development of the community was rapid in the decade of the 1910's. A carriage road from Victoria was completed in 1910 and four years later the Esquimalt and Nanaimo Company railway was completed to its northern terminus at Courtenay. Immigration from England, Scotland, and the Maritimes following World War I raised the population to about 700 persons.

**Courtenay:**

City of Courtenay was incorporated in 1915. It became the commercial hub of the Valley because it was centred on the river which provided fishing boat access and facilitated the transportation of lumber to and from the mill.

**Cumberland:**

Incorporated in 1900. The town site was actually discovered over a hundred years ago by a group of coal prospectors. Coal was king in the Village which at one time was a city of over 10,000 population with the largest Chinatown north of San Francisco. As the production of coal diminished, the City of Cumberland changed its status to that of a Village.

Comox:

The Dyke Rd. (Comox Rd. ) leading to Comox actually is a dyke which was built as a pioneer enterprise in the early days. The Indian Rancherie located on Dyke Rd. is where the pioneers came in the early days. This was also the site of the old Hudson Bay Base.

Black Creek:

This region of the Island remained undeveloped for several decades after settlers arrived in Courtenay, with only two settlers between Black Creek and Campbell River. Many of the later settlers to this area were Mennonite Brethren and their descendants are still found locally.

Merville:

The Provincial Land Settlement Board chose this area for a soldier settlement scheme after World War I and the community started in 1919.

Union Bay:

The community took its name from the Union Coal Mining Company that started the mines at nearby Cumberland. Twelve miles of track were laid between the mines and the dock facilities, built in 1889. The Union Bay Post Office, built in 1913 is a heritage building as is the Old Jailhouse Gift Shop.

CFB Comox:

Canadian Forces Base Comox was opened as a Royal Air Force Base in 1942 and was officially constituted as a Royal Canadian Air Force aerodrome on May 1, 1943.

In January of 1946, RCAF Station Comox was closed and placed under a care and maintenance program under the direction of the Department of Transport. In June of 1952, Station Comox was re-activated as an Air Defence Command. During the period 1954 to 1964 an extensive modernization program took place and several new buildings including a new large hangar (No. 7 Hangar) was built. There was also an extension of the runway to its present length of 10,000 feet.

## APPENDIX F

### TOURISM AND THE ARTS

Most communities and regions in British Columbia take pride in their local heritage, culture and skills of their artistic residents. Furthermore, a significant proportion of most populations have a genuine interest in participating in or attending arts and cultural events, performances, exhibitions and activities. These interests and talents are particularly well enshrined within the population of the Comox Valley.

Development of the arts is particularly important to Valley residents since it will enhance recreational and professional opportunities, enhance educational opportunities, increase quality of life and generate a number of additional and valuable social benefits. While these are admirable reasons to pursue development opportunities in the arts, we were specifically concerned during this study with the tourism opportunities that could be generated in parallel with social benefits, as a result of developing the arts as an attraction for both visitors and residents. Our research and analysis of the arts has, therefore, focussed on those aspects that could prove beneficial to the tourism industry in the Valley.

Based on our research of the Comox Valley and on our experience elsewhere concerning the value of the arts to the tourism industry, we have evaluated the roles which the arts do and could play in developing tourism in the study area.

The artistic resources and interests in the Comox Valley provide a number of assets that could be developed to enhance the tourism industry. Research into other areas (e.g. public opinion and travel patterns) demonstrates that a number of other advantages exist. A summary of the strengths associated with this tourist attraction is provided below:

- o the artistic community appears to be extensive and broadly based in the Comox Valley
- o development of the arts will lead to major social benefits while contributing to tourism industry growth
- o considerable success has been achieved to-date in developing the arts despite facility constraints
- o local performing, visual and literary artistic talents are considerable as evidenced by performance and exhibition attendance and local crafts production and sales
- o the arts community is enthusiastic about its development and its potential contribution to tourism industry growth
- o the arts represent a 'clean' tourist attraction with little or no identifiable negative impact on Valley residents

- o arts events and attractions, if developed and promoted, could relatively easily generate tourism industry benefits by holding existing visitors or pass-through visitors in the Valley for an additional one-half or full day
- o opportunities exist and resources appear to be available to enable development of the arts to take place
- o expansion of artistic opportunities could well lead to enhancement of the retirement industry in the Comox Valley.

While enthusiasm is high and opportunities for developing the arts are significant, the arts community in the Comox Valley faces a number of constraints. These constraints need to be evaluated carefully. A method to remove or overcome each constraint must be effectively planned and implemented, and the combined resources of the Valley must be channeled to develop the arts if significant increases in social, educational and economic benefits are to be achieved. A summary of the constraints associated with developing the arts as a tourist attraction is provided below:

- o on-going cooperative efforts within the artistic community have yet to be effectively combined with other economic development proponents to secure financial resources necessary
- o the arts community has not yet undertaken detailed analysis and planning of the specific strategy it must follow and the specific facility and organizational developments that are required
- o existing facilities are insufficient to effectively accommodate major, high calibre performances and exhibitions that will attract large number of new tourists
- o benefits that will accrue to the tourism industry from developing the arts does not appear to be known or readily appreciated within the Valley in general.

Our work in evaluating opportunities for developing the arts elsewhere combined with the results of research undertaken during this study have resulted in our conclusion that arts attractions in the Comox Valley should be developed and promoted as an important component of the tourism development strategy. It should be continually recognized that the benefits to the Valley from such action will be more than economic in nature, they will be social, recreational and educational. It should also be recognized that economic benefits will not only accrue to the tourism industry. Jobs in a variety of sectors will be created and the retail industry, the hotel industry, the transportation industry and the retirement industry can all be expected to benefit.

We have developed a number of recommendations concerning development of the arts in the Comox Valley and which are expected to directly and positively impact on tourism industry development in the Valley. These recommendations are summarized below:

- o The arts community in the Comox Valley should work under one umbrella organization, the Comox Valley Arts Council, in a cooperative manner with organizations involved with tourism development and promotion, to plan and develop the arts in a manner advantageous to artists, Valley residents and the tourist industry
- o The proposed development of a major arts/convention centre in the Comox Valley should be pursued since such a facility is considered to be critical to securing major tourist industry benefits from the arts. The following steps should be followed:

initiate and implement a public relations campaign to secure public support for the project

coordinate all potential users of the proposed centre to ensure cooperative efforts

secure support from the business sector, particularly the hotel industry

raise financing for and commission a feasibility and planning study for the centre which will identify and evaluate sites, arts centre and convention facility demand, a functional program, a development concept; capital and operating costs, revenue and sources of capital funds, organizational plans and an implementation schedule

initiate lobbying and applications for capital assistance

undertake preliminary engineering followed by architectural and engineering design for the complex.

- o The arts community in the Comox Valley and other organizations responsible for tourism promotion should work cooperatively with the Shoreline Arts Society to develop and promote the Coast Arts Fair on an annual basis. Distinctive roles should be established for the fair and the Filberg Festival so that they are scheduled and organized in a manner that each will generate its own distinct appeal (e.g. crafts focus vs. performing arts focus)
- o A plan should be developed and implemented to attract major touring performers, performing groups and exhibitions to the Comox Valley in parallel with arts centre development.



- o The arts community and other organizations responsible for tourism promotion should support the efforts of the Arts Alliance to expand the appeal of the art gallery and Comox Valley Crafts. Emphasis on arts and crafts by Valley artists and artisans should be ensured. Success achieved to-date with these attractions indicate that potential exists to expand their appeal and viability.
- o The Courtenay Youth Music Centre should, in parallel with arts centre development, plan and promote expansion of its music programs through the winter months, expansion of July festival and expansion of its curriculum.
- o Smaller, regional events and activities should be evaluated and established by the arts community which would appeal to visitors of all ages (e.g. crafts fairs in rural areas, 2-week potters camp, mini-tours to studios and galleries on Denman Island and Hornby Island, a touring working exhibit camp of local artists and artisans who could sell their work to tourists, etc.).

We believe that the arts, crafts and cultural community, along with its resources and talents, can play an important role in tourism industry development in the Comox Valley. Major events or festivals will need to be effectively organized and promoted. The proposed arts centre will likely become the focus of arts and cultural development if it proceeds. Smaller events and activities occurring on a wide-spread basis throughout the Valley will appeal to tourists and encourage sales of locally produced arts and crafts. Coordinated and effective planning and development in all of these areas will generate many benefits to Valley residents and establish a reputation which will encourage tourism growth in the future.