COMMUNITY TOURISM FOUNDATIONS

TOURISM PLANNING WORKSHOP REPORT

ROSSLAND, BC

September, 2012

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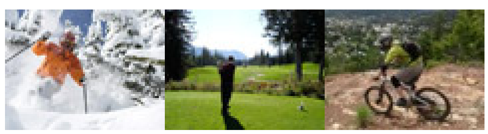
TOURISM
ROSSLAND

Strategic Plan

October, 2012



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The Planning Context

The Board of Directors of Tourism Rossland has initiated an update of the organization's strategic plan with support from Tourism BC, part of the Ministry of Jobs, Tourism and Skills Innovation. Tourism BC's Community Tourism Foundations program provides resources to communities to enable them to increase tourism revenues and economic benefits through destination development and marketing and sales initiatives. These resources include the services of professional facilitators to assist in the planning process. Suzanne Denbak of Cadence Strategies has been engaged to work with Tourism Rossland to prepare an update to the strategic tourism plan.

The plan which follows has been developed from input received in a one-day workshop held on September 21, 2012 with the Tourism Rossland Board of Directors and with representatives of Tourism BC and Kootenay Rockies Tourism Association. The agenda for the workshop began with a review of the high-level vision, mission and values of Tourism Rossland. With the 'big picture' confirmed by attendees, specific objectives for Tourism Rossland were established, target markets identified and Rossland's unique selling proposition/ competitive advantage analysed. Finally, strategies and tactics that would highlight this unique selling proposition/competitive advantage in vehicles that would reach target markets were determined. A resource allocation exercise was conducted to assign the organization's limited resources to priority market sectors.

This strategic plan for Tourism Rossland is intended to be a living document that serves both as a compass for the organization and as a tool for the Board and its Executive Director to manage marketing investments and report on the status of activities. As market conditions are perpetually changing, this plan should be updated and reviewed regularly to ensure the recommended strategies and tactics will deliver maximum progress towards Tourism Rossland's objectives and the pursuit of its vision.

The Role of Partnerships

The global travel market is fiercely competitive and British Columbia is a small player. Destinations such as Rossland must invest and leverage their resources wisely to secure maximum returns measured in visitor volumes and revenues. Fortunately, Rossland has many partners to support its marketing efforts. Tourism Rossland has effectively developed relationships with these many partners creating a strong foundation for future efforts.

Tourism BC promotes the Province internationally and where the Rossland experience fits the market demand (e.g. Australian skiers, Ontario mountain bikers) then Rossland is included in these marketing and promotional activities that range from an on-line presence on the internet and in social media to more traditional advertising campaigns, media relations and tour operator relations.

Kootenay Rockies Tourism (KRT) also offers regional marketing programs that incorporate Rossland experiences such as the Powder Highway collection featuring 8 resorts, cool small towns, epic snowfall, fantastic cat and heli skiing and quality nordic skiing. As well, tour operator relations and media relations are directly supported by the KRT team. The Community Tourism Opportunities (CTO) funds provide partnered dollars to support specific qualifying Rossland marketing initiatives. Tourism Rossland has leveraged all of these programs effectively in the past and will continue to do so in the execution of this strategic plan.

While it is important to understand regional competitive differences, it is also essential to view regional neighbours such as Nelson and Whitewater Ski Resort as partners. Programs for visitors that combine multi-day experiences skiing, biking, golfing etc. will support Rossland's objectives of increased visitation and revenues.

Partnerships with Trail in relation to Sport Tourism as well as partnerships within Rossland with arts and culture organizations, recreational clubs and other tourism businesses are also fundamental to Tourism Rossland's continued success and will continue to be essential to the execution of the strategic plan which follows.

Vision of the Organization

"Tourism Rossland will grow Rossland's year round visitor economy within the context of the community's vision and values."

Mission of the Organization

"Tourism Rossland works collaboratively with stakeholders and leverages its resources effectively to execute strategic marketing and sales programs that deliver more overnight visitors to Rossland throughout the entire year who stay longer, and spend more and return again and again."

Guiding Principles

In the pursuit of our vision and our mission, we will conduct ourselves in keeping with these guiding principles:

- We will be effective, delivering maximum returns for the level of investment
- We will be accountable, measuring the results of programs, adjusting to market conditions and reporting results to stakeholders
- We will be collaborative, working together with local government and other organizations to further our objectives
- We will be customer focused, placing customer needs first in the belief that what is best for the customer will ultimately be best for Tourism Rossland's stakeholders
- We will be efficient and leveraged, keeping our administration lean and accessing leveraged dollars to supplement our own budget
- We will be open and transparent, keeping our processes open to public scrutiny and sharing our decisions and the rationale behind them
- We will be inclusive, welcoming all those who wish to be informed or participate in our programs
- We will be innovative, proactive and forward looking, seeking creative solutions that are ahead of the marketplace and our competition
- We will be sustainable, recognizing the importance of Rossland's natural setting, its community values and the need to make an important contribution to a healthy economy
- We will be fair to all stakeholders

- We will be strategy and research focused, forecasting the market closely and crafting strategies that promote Rossland's unique selling proposition, brand and key messages in a disciplined and logical way
- We will be results oriented, under promising and over delivering on our objectives

Target Markets/Competition/Unique Selling Proposition

Rossland competes with many other destinations and must differentiate itself and hold a defensible position in the marketplace. As well, when partnering with regional neighbours, it is important to understand each other's strengths and to offer complimentary experiences. Destinations like Nelson feature their 'hippie' groove, Baker Street's restaurants and shops and their location on Kootenay Lake. Revelstoke lays claim to the biggest vertical, best snow quality, comfortable lodging, competitive packaging and pricing as well as benefiting from their proximity to Kelowna. The City of Trail differentiates itself based on its sport tourism facilities and its proximity to service the corporate market.

In the face of this and other competition from Fernie, Kimberley, Golden as well as destinations like Christina Lake, Sandpoint and Schwitzer, it is essential that Rossland focus its marketing messages on its own unique selling proposition. Appendix B provides some additional background information on this competitive set.

Key elements of this unique selling proposition are categorized as either motivators to travel (which should be featured in marketing and promotions) or contributors to the travel experience that enhance the experience and support longer stays and return visits:

Rossland Travel Motivators:

- Quality of skiing (including the ability to host ski races)
- Location on the Powder Highway – Red Resort, Whitewater experiences can be combined
- Cat skiing and downhill skiing all in one trip
- Quality of mountain biking and cross-country bike trails (well signed, well maintained)

Rossland Experience Contributors:

- Everything is close
- Small town feel
- Friendly locals
- History and heritage
- Arts
- Golf quality, value; on the golf route
- Broad range of outdoor experiences – family friendly to extreme
- Not overly commercialized
- No motorized activity (quad's/snowmobiles)
- New downtown
- Variety and quality of accommodation
- Cool factor – the feel and energy of Rossland

Target Markets:

- Motivated to ski, bike, golf, getaway
- Attending sports events, corporate meetings
- Done Whistler, Banff and are looking for something more intimate, real – appreciate proximity of everything in Whistler without having the artificial village design
- More affluent – looking for value but not necessarily the lowest price
- Repeat visitors - 60% of guests are returning
- Active, athletic, or aspiring to be so
- Over 55, affluent empty nesters – golf, downtown experience

Geographic area of origin:

Winter:

- 61% Canada (BC residents 45%; Calgary 18%; Ontario 16%) – Note BC residents are from the Kootenay region 30%; Kelowna 25%; Kamloops 18%; Vancouver 7%

- 31% US (Washington State 60% -- Seattle/Spokane in particular)

- 8% International (Australia; UK)

Summer:

- Similar to winter but international visitor mix is more heavily weighted to Europeans with fewer Australians)

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Tourism Rossland has identified the following target markets in which it can leverage a unique selling proposition vis-à-vis its competition in order to successfully attract visitors to Rossland.

Target Market	Competition	Unique Selling Proposition
1. Skiiers/Snowboarders from the Kootenays, rest of BC (Kelowna, Kamloops, Vancouver), Alberta, Ontario, Washington State and International Markets	Revelstoke, Golden, Fernie, Banff, Whistler, Sun Peaks, Big White, Silver Star	Rossland offers a real riding experience with great powder, no line-ups, epic cat skiing, Nordic trails, friendly locals and a large dose of 'cool'. Rossland has great restaurants, lots of accommodation options and everything you need just steps away.
2. Mountain Bikers	Moab, Whistler, Fernie, Golden, Revelstoke, North Shore Vancouver, Squamish	Rossland is epic – epic riding on trails like the Seven Summits; epic small town feel with friendly locals and everything you need just steps away.
3. Golfers (tri-cities in Washington, Kelowna, Calgary)	Rest of Kootenay golf experiences; Vancouver Island golf experiences; Radium/Fairmont/ Kimberley golf experiences	Redstone offers great golf and exceptional value – make Rossland your base for experiencing Kootenay golf. Located near Birchbank, Castlegar and Christina Lakes golf courses, you can play four memorable courses and return each night to enjoy Rossland's wide range of accommodations and restaurants.
4. Meetings/Conferences/ Corporate Retreats	Other resort destinations in BC	Incredible scenery, outstanding accommodations and meeting facilities paired with exceptional dining are all just steps away along Rossland's heritage downtown stroll.
5. Corporations doing business here (construction projects in Trail; recruiting at Teck)	Trail facilities	Incredible scenery, outstanding accommodations and meeting facilities paired with exceptional dining are all just steps away along Rossland's heritage downtown stroll.
6. Weddings/Reunions for families in the Kootenays	Other dramatic settings/resorts/ beaches	The best Kootenay-based choice - Small town charm, incredible scenery, romantic accommodation and facilities to host your special day

Organizational Objectives/Measures of Success

Successfully growing the tourism economy requires the participation and support of all tourism stakeholders including local and regional government and all tourism operators. The quality of facilities, the level of service and the value provided are the manifestation of the marketing message and together they must exceed visitors' expectations. The visitor experience and their desire to return are fundamental components of the marketing mix.

The work of Tourism Rossland is an important contributor to the success of tourism in Rossland. Tourism Rossland has established the following objectives and measures of success for the next 5 years:

1. **Grow year round visitor revenues through focused investments in marketing and sales**

   Measure: Increase the value of the Municipal Regional District Tax (MRDT) collected per year for each of the next five years
   Measure: Percentage increase in skier visits per year for each of the next five years
   Measure: Increase in bike count on trails
   Measure: BlackJack Nordic trail usage statistics
   Measure: Leveraging ratios achieved

   Note: The Accommodation sector has agreed to investigate reporting their Occupancy and Average Daily Rate statistics through a confidential reporting tool such as the Commercial Accommodation Survey previously available through Tourism BC/Research, Planning and Evaluation. Contact is Nancy Radman nancy.radman@gov.bc.ca

2. **Strengthen the visitor experience directly and through support for local industry**

   Measure: Conduct annual visitor satisfaction survey and share key findings with stakeholders to support continuous improvement

3. **Build strong community support for the tourism industry and for the leadership role played by Tourism Rossland**

   Measure: Achieve renewal of MRDT petition every five years

Strategies

In order to achieve the noted objectives, the following strategies will be executed by Tourism Rossland. These strategies are relevant for a three year timeframe, although priorities and relative emphasis will change in each year as reflected by resource allocation decisions.

1. **Grow year round visitor revenues through focused investments in marketing and sales**
   - **1.1. Promote winter visitation, working cooperatively with Red Mountain and Big Red Cats, with Nelson Kootenay Lake/Whitewater Ski Resort and with other Powder Highway experiences**
   - **1.2. Promote Rossland as a mountain biking destination**
   - **1.3. Promote Rossland as a base for golf experiences**
   - **1.4. Promote local festivals and events**
   - **1.5. Build awareness of Rossland as a destination for meetings and groups**
   - **1.6. Build awareness of Rossland as a destination for weddings/reunions**
   - **1.7. Provide support for sporting events coming to Rossland and Trail**
   - **1.8. Pursue editorial coverage in targeted media outlets for all targeted market sectors**
   - **1.9. Build a community of quality followers in social media outlets**
   - **1.10. Develop a strong web presence featuring Rossland's unique experiences**
   - **1.11. Advertise in select media**
   - **1.12. Create print collateral showcasing Rossland**
   - **1.13. Attend select trade and consumer shows**
   - **1.14. Build relationships with existing and potential visitors**
   - **1.15. Develop and support travel trade relationships**
   - **1.16. Leverage select regional marketing programs**

2. **Strengthen the visitor experience directly and through support for local industry**
   - **2.1. Promote front-line training program offered through Nelson & District Chamber of Commerce**
   - **2.2. Conduct visitor surveys**

3. **Build strong community support for the tourism industry and for the leadership role played by Tourism Rossland**
   - **3.1. Lead and coordinate data collection in support of estimating the value of the local tourism economy in Rossland**
   - **3.2. Build relationships with tourism stakeholders and the community at-large**
   - **3.3. Conduct stakeholder surveys**
   - **3.4. Communicate regularly and effectively with stakeholders and the community at-large**

Objectives/Strategies/Tactics

Objectives will only be achieved if they are supported by strategies and tactics. Specific tactics associated with each strategy have been identified for the next 12 months. Tactics typically change each year in response to changing market conditions while strategies remain appropriate for longer periods of time.

1. Grow tourism revenues through focused investments in marketing and sales

1.1. Promote winter visitation, working cooperatively with Red Mountain and Big Red Cats, with Nelson Kootenay Lake/Whitewater Ski Resort and with other Powder Highway experiences

- **1.1.1.** Attend consumer ski shows; offer information about Rossland; special show packages/promotions; contesting in order to grow data base of qualified visitors and build awareness of Rossland's winter product
- **1.1.2.** Establish relationship with Pacific Coastal and promote flight/transfers/accommodation/ski and promote in in-flight magazine, on website and in social media
- **1.1.3.** Promote Rossland at IF3 ski movie festival in Montreal
- **1.1.4.** Investigate opportunities for retail promotions to targeted consumers with key retail suppliers
- **1.1.5.** Media relations as per Strategy 1.3
- 1.1.6. Use ski film screenings and parties to attract target market e.g. Spokane

1.2. Promote Rossland as a mountain biking destination

- **1.2.1.** Produce and distribute Rossland trail map
- **1.2.2.** Manage web site content www.bikerossland.ca and local event updates; enhance www.tourismrossland.com content to feature unique selling proposition and showcase 'Epic' status
- **1.2.3.** Provide support to tour operators
- **1.2.4.** Develop a Moab-Rossland relationship and leverage complimentary seasons
- **1.2.5.** Continue to leverage membership in Mountain Bike BC

1.3. Promote Rossland as a base for golf experiences

- **1.3.1.** Enhance website content to feature affordable golf itineraries and 'boy's trips' that utilize Rossland as the base for 2-3 golf rounds at surrounding courses including Redstone, Christina Lake, Birchbank and Castlegar

1.4. Promote local festivals and events

- **1.4.1.** Maintain festival calendar on website
- **1.4.2.** Upload market-ready events to www.hellobc.com and to Kootenay Rockies mobi application for regional travelers
- **1.4.3.** Act as media liaison for market ready select events (see below)

1.5. Build awareness of Rossland as a destination for meetings and groups

- 1.5.1. Add a web pages dedicated to meetings in Rossland – showcase facilities, amenities and activities
- 1.5.2. Establish relationships with local event planners
- 1.5.3. Leverage PavCo relationship and potential provincial marketing of meetings/ conferences

1.6. Build awareness of Rossland as a destination for weddings/reunions

- 1.6.1. Media relations as per Strategy 1.8
- 1.6.2. Develop web pages dedicated to weddings in Rossland

- **1.6.3.** Launch and manage Rossland presence in social media forums/blogs dedicated to weddings market

1.7. Provide support for sporting events coming to Rossland and Trail

- **1.7.1.** Update www.hostingbc.com content as necessary
- **1.7.2.** Update www.trailrossland.com content as necessary
- **1.7.3.** Act as a media liaison for all large scale sporting events
- **1.7.4.** Provide support to event organizers and assist with accommodation needs

1.8. Pursue editorial coverage in targeted media outlets

- 1.8.1. Leverage regional/provincial/national media relations efforts by working closely with regional/Kootenay Rockies travel media rep and providing story ideas, press releases and product familiarization – focus of stories will be winter experiences (skiing, cat-skiing, Nordic); mountain biking; golf experiences; weddings/reunions in Rossland
- 1.8.2. Work with stakeholders to develop and host familiarization tours for visiting journalists/bloggers etc.
- 1.8.3. Enhance the image bank to offer stunning high quality visuals for use by media, travel trade and on the website/in social media outlets. Continue to build visual resources for ski, biking, golf, meetings and wedding sector.
- **1.8.4.** Act as media resource for market-ready events in Rossland including Winter Carnival, The Gathering

1.9. Build a community of quality followers in social media outlets

- 1.9.1. Participate in key social media to build a community of visitors interested in Rossland and its unique experiences e.g. Facebook, Twitter

1.10. Develop a strong web presence featuring Rossland's unique experiences

- **1.10.1.** Continue to invest in the Tourism Rossland website as a key resource for visitors including images, videos, key search terms to ensure high organic search engine placement
- **1.10.2.** Feature upcoming events in Rossland
- **1.10.3.** Maximize presence in www.hellobc.com by encouraging all tourism stakeholders to contribute to blogs and to purchase a listing/provide special offers ; provide www.timetravelbc.com updates and KR Mobi updates
- **1.10.4.** Create sample itineraries to showcase unique experiences available to visitors and promote via website
- **1.10.5.** Coordinate marketing for packaging of experiences for visitors

1.11. Advertise in select media

- 1.11.1. Review KRT, provincial and national programs for appropriate opportunities
- 1.11.2. Consider other advertising opportunities if return is high and measurable

1.12. Create print collateral showcasing Rossland

- 1.12.1. Produce Rossland Trail Map
- 1.12.2. Initiate joint venture discussions with the Chamber, Red Mountain and Tourism Rossland to redesign and distribute the Rossland Visitor Guide
- 1.12.3. Develop Town Map of Rossland
- 1.12.4. Continue to produce a walking tour brochure that features Rossland's heritage buildings, stories of interest

1.13. Attend select consumer shows
- 1.13.1. Attend Consumer ski shows as per 1.1 above

1.14. Build relationships with existing and potential visitors
- **1.14.1.** Continue to build database of qualified subscribers through contests and promotions
- **1.14.2.** Produce/distribute E-newsletter to subscribers that showcases unique Rossland experiences

1.15. Develop and support travel trade relationships
- 1.15.1. Represent Rossland at Canada's West Marketplace® and Rendezvous in partnership with regional/provincial DMO
- **1.15.2.** Invite and host tour operator key personnel on Rossland familiarization tours

1.16. Leverage select regional marketing programs
- **1.16.1.** Work with Kootenay Rockies Tourism to develop and participate in Partners' Programs that leverage Tourism Rossland's core marketing efforts

2. Strengthen the visitor experience directly and through support for local industry

2.1. Champion a comprehensive front-line training program
- 2.1.1. Promote WorldHost training or alternative
- 2.1.2. Promote Tourism Business Essentials available free of charge through Tourism BC

2.2. Conduct visitor surveys
- **2.2.1.** Conduct baseline visitor survey and share findings with all stakeholders

3. Build strong community support for the tourism industry and for the leadership role played by Tourism Rossland

3.1. Lead and coordinate data collection in support of estimating the value of the local tourism economy in Rossland
- 3.1.1 Contact Tourism BC Research Services to commence process, obtain data sheets and understanding of minimum numbers of participating accommodators
- 3.1.2 Introduce program to hotels/motels, B&B's, campsites, explain data requirements, convey absolute confidentiality and discuss benefits of participating

3.2. Build relationships with tourism stakeholders and the community at-large
- 3.2.1 Attend community meetings as guest speaker to discuss results to date, upcoming plans
- 3.2.2 Secure regular local media coverage to share tourism news, successes and to showcase Rossland experiences – 'Be a Tourist in Your Own Town' and encourage locals to experience Rossland with their visiting friends and family

3.2.3 Provide opportunities to share the Plan and Tourism Rossland information on a face to face basis with stakeholders

3.3. Conduct stakeholder surveys

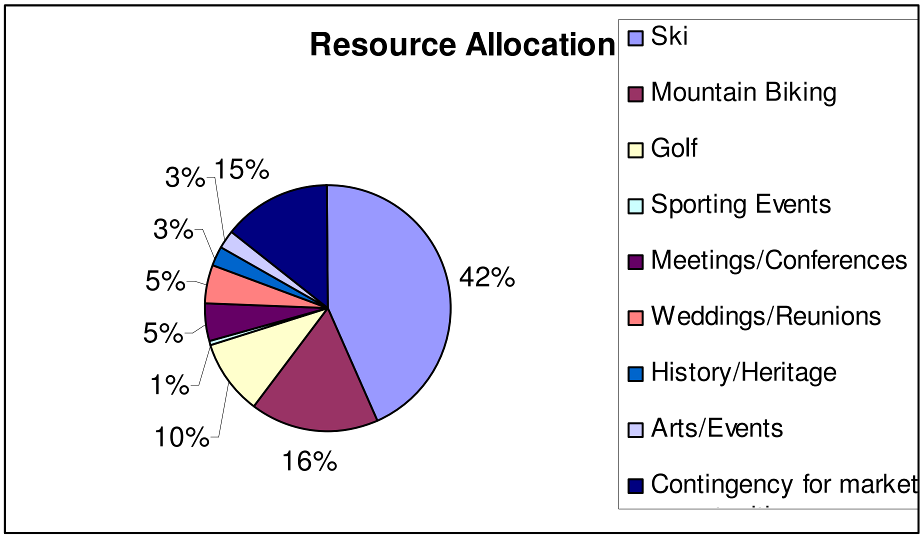
3.3.1 Draft survey questions
3.3.2 Conduct survey and evaluate results

3.4. Communicate regularly and effectively with stakeholders and the community at-large

3.4.1. Publish regular stakeholder newsletters that feature results of completed marketing programs and showcase upcoming programs led by Tourism Rossland
3.4.2. Host a stakeholder Open House to solicit input to strategic plan and then once plan is approved, provide highlights of Board approved strategic plan and share results of efforts to date
3.4.3. Provide regular content updates for the Stakeholder section of the website
3.4.4. Present annual value of tourism (once measured) and secure local media coverage

Resource Allocation

The Board of Directors confirmed strategic priorities through the assignment of resources to various product sectors. The following allocations were derived and should be used as a guideline in establishing a more detailed annual operating budget in support of strategic plan implementation:



Appendices

Appendix A - Market Research

1. Introduction

The following market research extracts offer insights into the context for tourism development in Rossland:

- Macro Environment
- Tourism Trends
- Regional Research
- Sector Research
    i. Mountain Biking
    ii. Alpine Skiing
    iii. Nordic Skiing
    iv. Festivals & Events
    v. Sport Tourism

2. Macro Environment

This section provides an overview of world economic trends, their effect on tourism, and world tourism trends.

2.1 Conclusions

a) **Because tourism is largely a discretionary item, it is dependent on personal disposable income.** When economies are strong, tourism expenditures grow more rapidly than consumer spending as a whole. Likewise, during recessions, tourism can decline quickly and substantially. However, tourism is resilient and has bounced back quickly when economies grow.

The overall number of international visitors is projected to increase to 1.0 billion and 1.6 billion in 2010 and 2020, respectively, with an average annual growth of 4.5% between 2010 and 2020. International tourism arrivals are highest in Europe, Americas and East Asia & the Pacific representing about 90% of global international visitors.

b) **Economic recession has a large negative effect on tourism.** The global economic recession which commenced in 2008 resulted in a considerable decline in global travel in 2008 and 2009. International tourist arrivals declined by 4%, while receipts declined by 6% in 2009. Clearly, global and regional economic conditions impact visitors' propensity to travel and travel patterns.

During the first quarter of 2010, it appeared that global economic stimulation packages were helping stabilize credit markets, leading to a rebound in equity markets. However, the recent economic crisis in Greece, and its potential impact on the economy of the European Union and, ultimately the global economy, point to the uncertainty, vulnerability and interconnectedness of the global economy. This type of economic uncertainty impacts consumers spending and travel patterns, ultimately impacting tourism industry performance worldwide.

c) **The rise in the value of the Canadian dollar, particularly against the US dollar, has a negative effect on tourism.** The recent decline in the value of the US dollar has a two-fold effect on tourism to BC:

- it will be more difficult to attract US travellers but more importantly,
- it will be challenging to maintain and grow domestic travel levels.

Historically, US travellers have not been highly aware of the exchange rate; therefore, the impact of fluctuations was somewhat limited. BC tourism businesses that advertise in the US often quote prices in US dollars thus, when the exchange rate changes, the quoted US dollar price also changes. Canadian travellers, on the other hand, are highly aware of exchange rates and, therefore, more influenced by a favourable rate to travel within Canada. The decline in the value of the US dollar appears to be a significant contributing factor to Canada's growing travel deficit with the US, along with economic and other factors.

d) **Tourism is a worldwide industry and British Columbia is a small player.** In 2009, Canada ranked below the top 10 countries for international tourism receipts, hosting a 1.6% market share. BC holds a 0.4% market share.

The US, Spain and France have consistently been the top three countries in the last several years with regard to tourism receipts. Italy and China held their positions of 4th and 5th place in 2009 followed by UK (6th) and Germany (7th). The remaining top ten countries for tourism receipts in 2008 were Australia (8th), Turkey (9th) and Austria (10th).

With regard to international arrivals, France consistently places 1st, followed by the US, Spain, China, Italy, and the UK. Over the last several years, Canada and British Columbia's international arrivals have declined for two consecutive years due to the downturn in the worldwide economy, the higher cost of a vacation in Canada, among other factors.

2.2 Main Findings

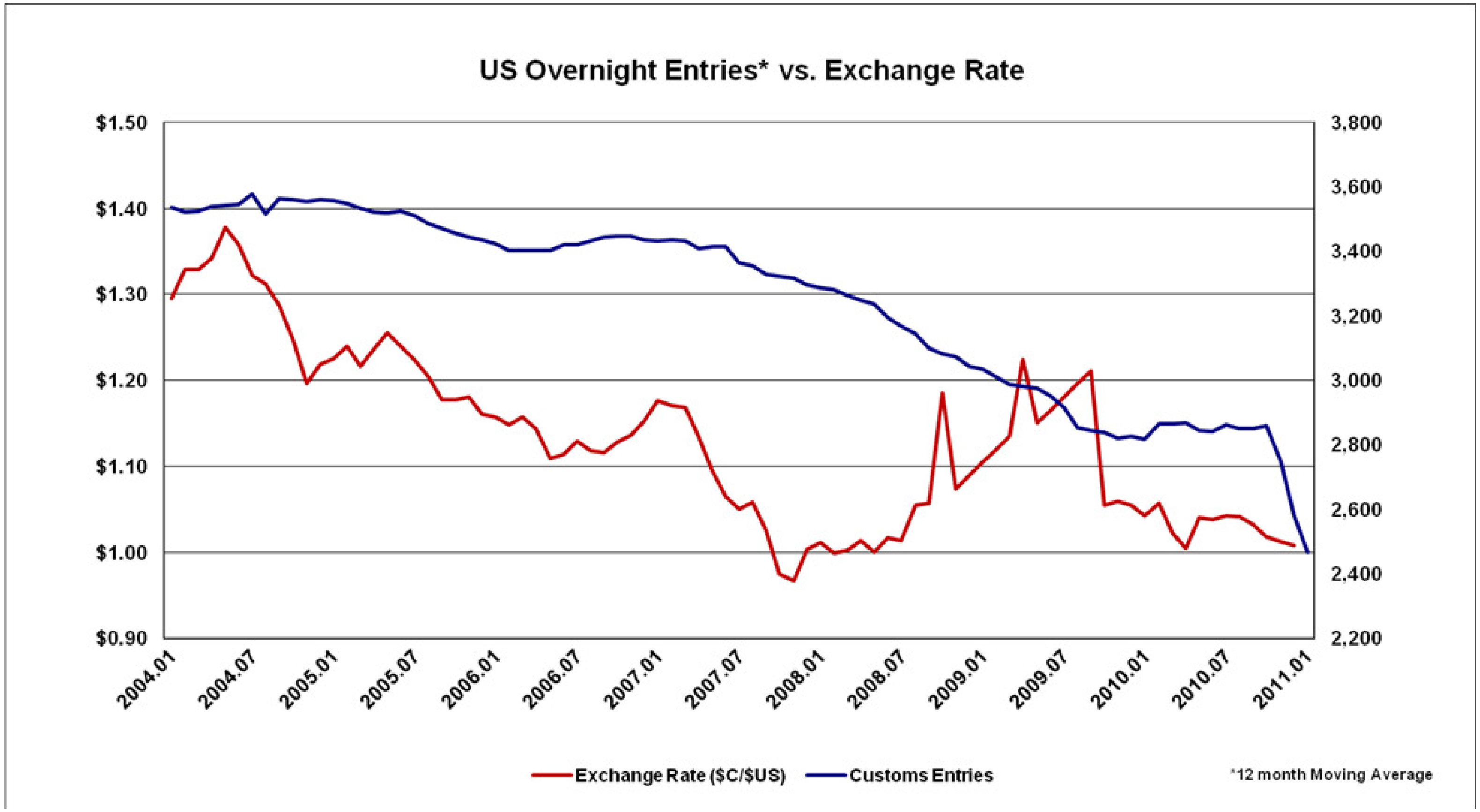
World's Top 10 Countries for International Tourism Receipts

Rank (2009)	Country	Int'l Tourism Receipts ($US billions)			% Change (current prices)			Market Share (%)	
		2007	2008	2009	07/06	08/07	09/08	2008	2009
	World	857.0	944.0	852.0	15.1	10.1	-4.1	100.0	100.0
1	United States	96.7	110.0	93.9	12.8	13.8	-14.6	11.7	11.0
2	Spain	57.6	61.6	53.2	12.8	6.9	-13.7	6.5	6.2
3	France	54.3	56.6	49.4	17.1	2.4	-12.7	5.9	5.8
4	Italy	42.7	45.7	40.2	11.9	7.2	-12.0	4.8	4.7
5	China	37.2	40.8	39.7	9.7	9.7	-2.9	4.3	4.7
6	Germany	36.0	40.0	34.7	9.9	11	-13.3	4.2	4.1
7	United Kingdom	38.6	36.0	30.0	11.6	-6.7	-16.6	3.8	3.5
8	Australia	22.3	24.7	25.6	25.0	10.6	3.4	2.6	3.0
9	Turkey	18.5	22.0	21.3	9.7	18.7	-3.2	2.3	2.5
10	Austria	18.9	21.6	19.4	13.5	15.4	-10.1	2.3	2.3
	Canada	15.3	15.7	13.7	4.7	-1.3	-12.7	1.5	1.6
	British Columbia	3.5	3.6	3.1	2.6	2.8	-10.7	0.3	0.4

Sources: UNWTO Tourism Highlights 2010 Edition; The Value of Tourism in BC, 2011, Tourism British Columbia

Currency fluctuations have long been a metric that Tourism BC closely monitors; not only can exchange rates impact markets' (such as the US) propensity to travel to Canada and BC, but they can also impact domestic travel as many Canadian residents may opt for a US 'substitute' destination if it is more cost effective. It is difficult to ascertain the direct relationship between the exchange rate and visitation, as there are many other factors such as cost of transportation, distance, passport regulations, border issues, etc. The following graph shows US overnight customs entries and the US exchange rate since 1990.

US Overnight Customs Entries and Exchange Rate



Sources: Bank of Canada, Statistics Canada compiled by Tourism BC.

3.0 Tourism Trends

This section presents an overview of tourism trends to BC, including number of visitors, visitor revenue, and historical and consumer trends to provide a context for planning for Rossland.

3.1 Conclusions

The following conclusions are derived from the research findings documented in Section 3.2

a) **Tourism to British Columbia has experienced steady growth but with fluctuations starting in 2001 due to world events and decline in 2009 due to the economic downturn.** Tourism revenue for 2010 is estimated at $13.4 billion (an increase of 6.2% vs. 2009). While tourism revenue has been growing in BC, the rate of growth fluctuates as a result of significant factors (primarily external factors) including:

- A sharp decline in the growth rate following the September 11, 2001, terrorist attacks in New York;
- A decline in the growth rate in 2003 as a result of the Sudden Acute Respiratory Syndrome (SARS) "scare"; and,
- A sharp decline in the growth rate starting in 2007 as a result of global economic pressures.

These fluctuations emphasize how vulnerable tourism performance is to a range of external factors.

b) **Canadian and American visitors made up 91% of visits to BC in 2010 (same as 2009), with BC residents making up 53% of visits in BC.**

- British Columbia (53%) and Other Canada (19%) generated the largest proportion of visitors for BC (72%).
- The US generated 19% of visitor volume, followed by Asia/Pacific (5%) and Europe (4%).
- British Columbia and Other Canada generated 59% of visitor revenue (was 61% in 2009).
- The US generated 19% of visitor revenue, followed by Asia Pacific (11%) and Europe (10%).

Domestic markets are clearly critical to BC, particularly in terms of visitor volumes. The US and, in particular the longer-haul markets of Asia/Pacific and Europe, are higher yield markets for BC.

c) **BC residents are the least volatile in travel patterns without the degree of fluctuation experienced from international visitation.** They are an important market for BC sectors and communities as they travel in BC more often (good source of repeat visitation), explore areas of the province beyond Vancouver / Victoria / Whistler, have a higher propensity to travel in BC year round, and are more accepting of varying qualities of facilities, amenities, and customer service levels. BC residents represent the first wave of visitors to allow a sector or community to build its tourism business to become more export ready.

d) **International visitation is subject to greater swings in tourism growth (with more increases and decreases than the domestic market) and in recent years, BC has been experiencing declines in international visitation.**
- From 2005 to 2010, the number of overnight international visitors has declined by 12%.
- During the same period, the number of overnight US visitors has declined by 16%.
- The number of overnight visitors from Asia/Pacific has declined by 5%.
- The number of overnight visitors from Europe has increased by 4%.

International visitors are higher yield visitors, but they have correspondingly higher standards, tending to limit their experiences to those that are export ready. While the international markets are attractive, negative experiences have far reaching consequences so they should be targeted only when the destination has high quality facilities, amenities, and customer service levels.

e) **International visitor entries into Canada via British Columbia decreased 4% in 2011, continuing a downward trend that began in 2001.**
- From 2001 to 2011, total international visitor entries into the province have decreased by approximately one-third (-33.2%).
- For over a decade, same-day and overnight entries from the US have been in decline, but the US still represents the largest share of total international visitor entries in to BC (75% in 2011).
- In 2011, much of the slowdown in non-US entries was due to fewer European visits (-10.1%), and visits from Japan (-17.5%) and South Korea (-11.6%).
- For the first time, China surpassed Japan in total visitor entries in 2011.

Entries into Canada by international visitors via British Columbia have declined over the past decade; penetrating international markets at the community level requires a large amount of resources and in most circumstances is handled by established partnerships at the regional and provincial level.

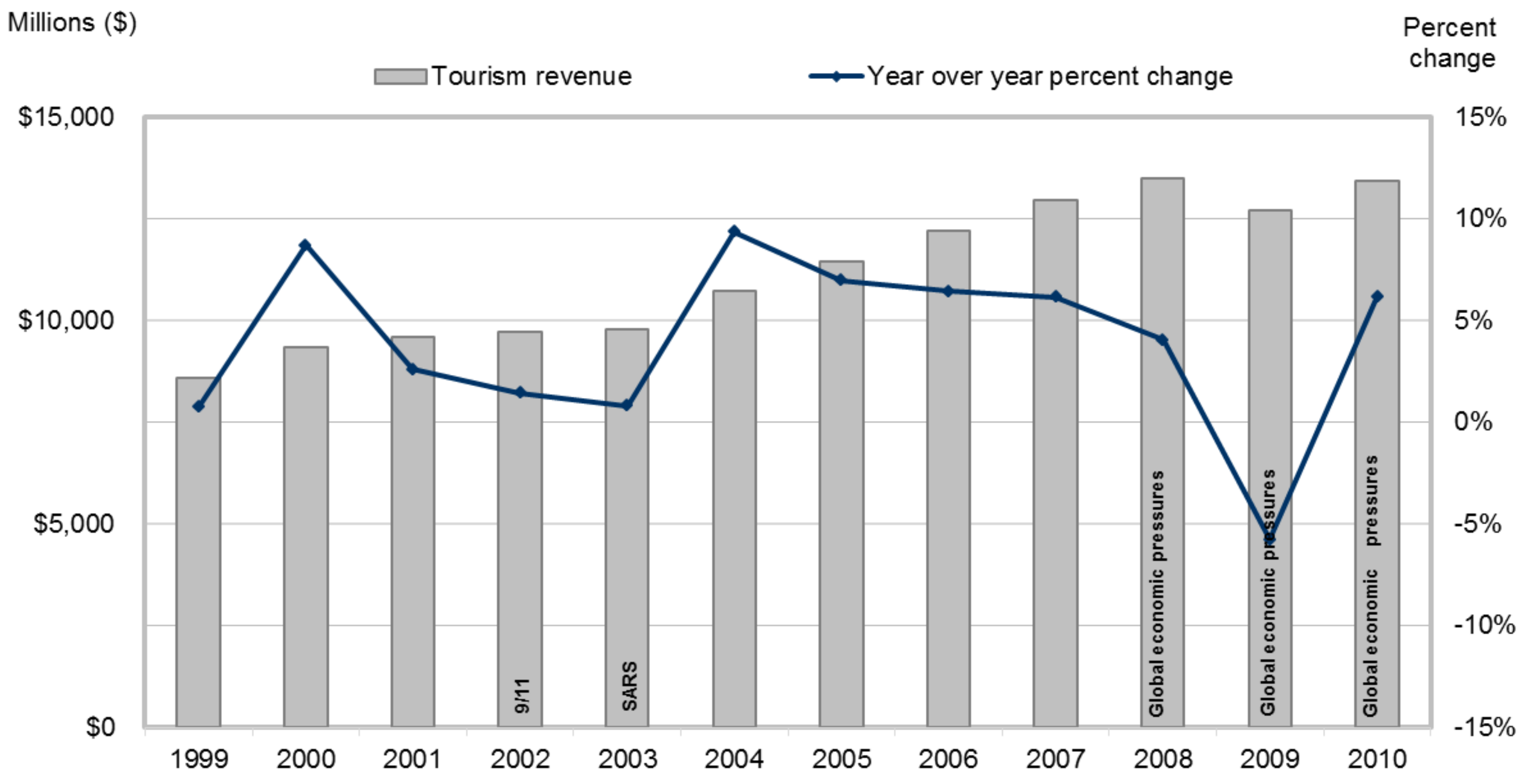
f) **Consumer preferences will continue to be dependent on long and short term drivers of industry performance, such as the economy, changing demographics, and the changes in technology use.**
- The US and the United Kingdom travellers to British Columbia are slightly older compared to the younger markets from Germany, Japan, and South Korea.
- 85% of BC residents use the internet; the highest rate in Canada.

- Websites continue to be the most used information sources when choosing destinations, followed by recommendations from friends and family.

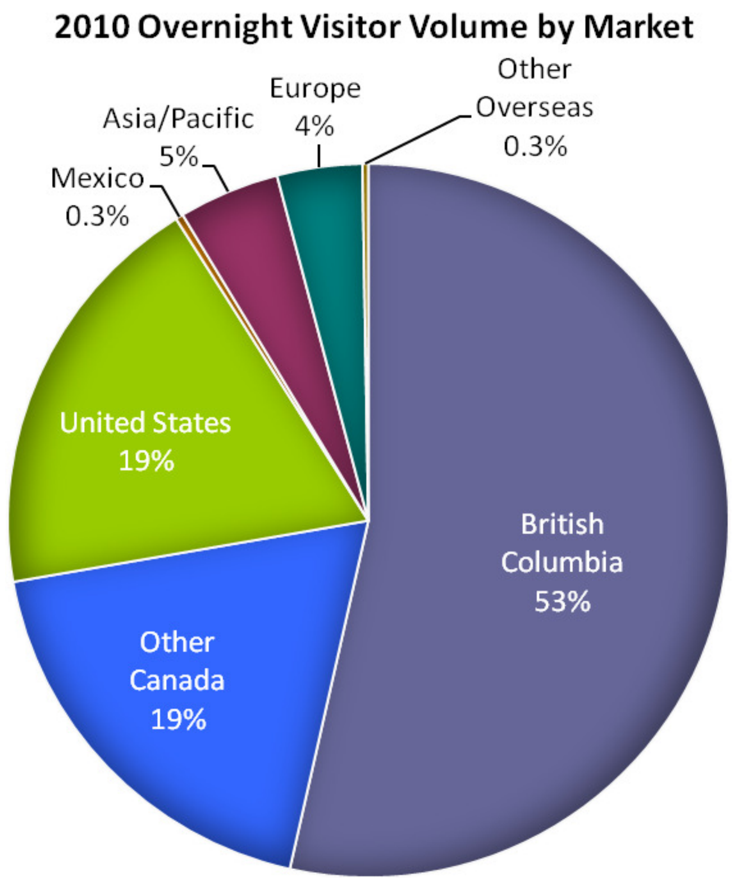
  While most long and short term drivers of tourism cannot be controlled, communities can monitor tourism trends and apply learnings to appropriate practices. This could include reviewing information provided on the internet and providing visitor experiences for both younger and older travellers.

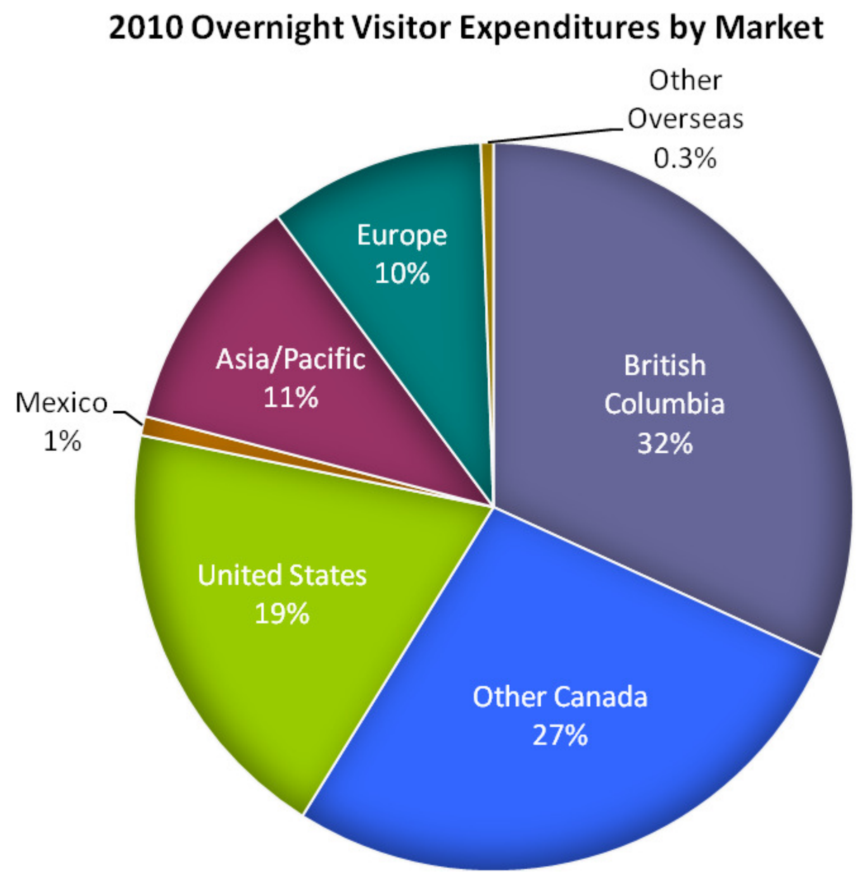
3.2 Visitors to BC

BC Overall Tourism Revenue and Year-Over-Year Change (2000 – 2010)



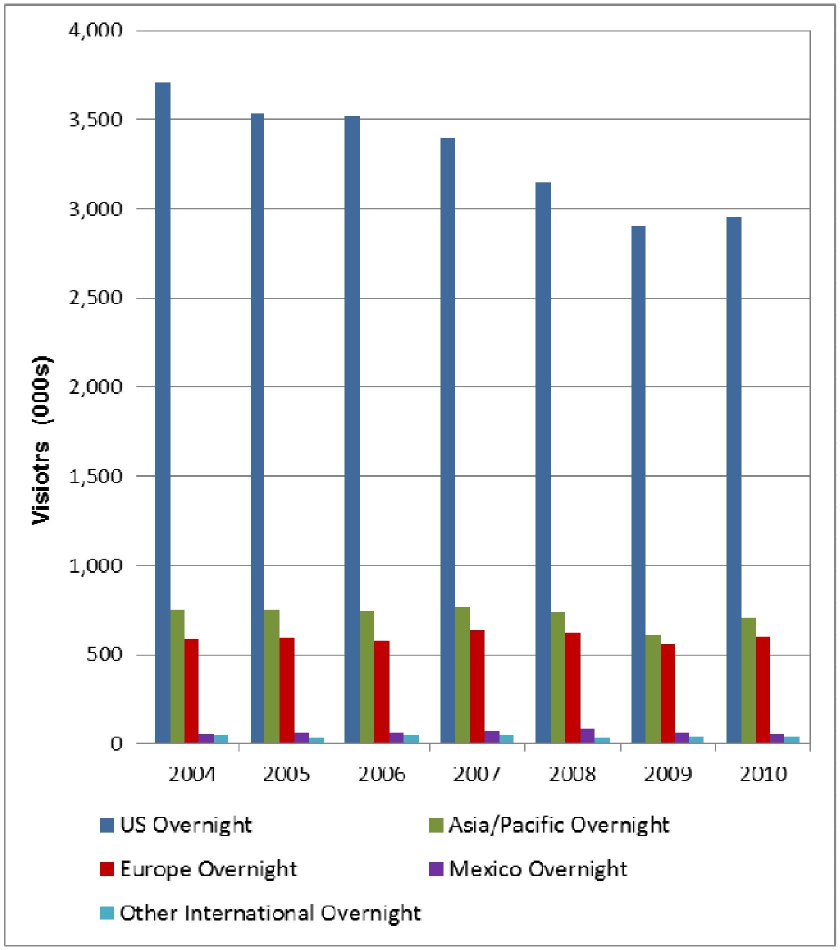
Source: The Value of Tourism in British Columbia, 2010, Tourism British Columbia

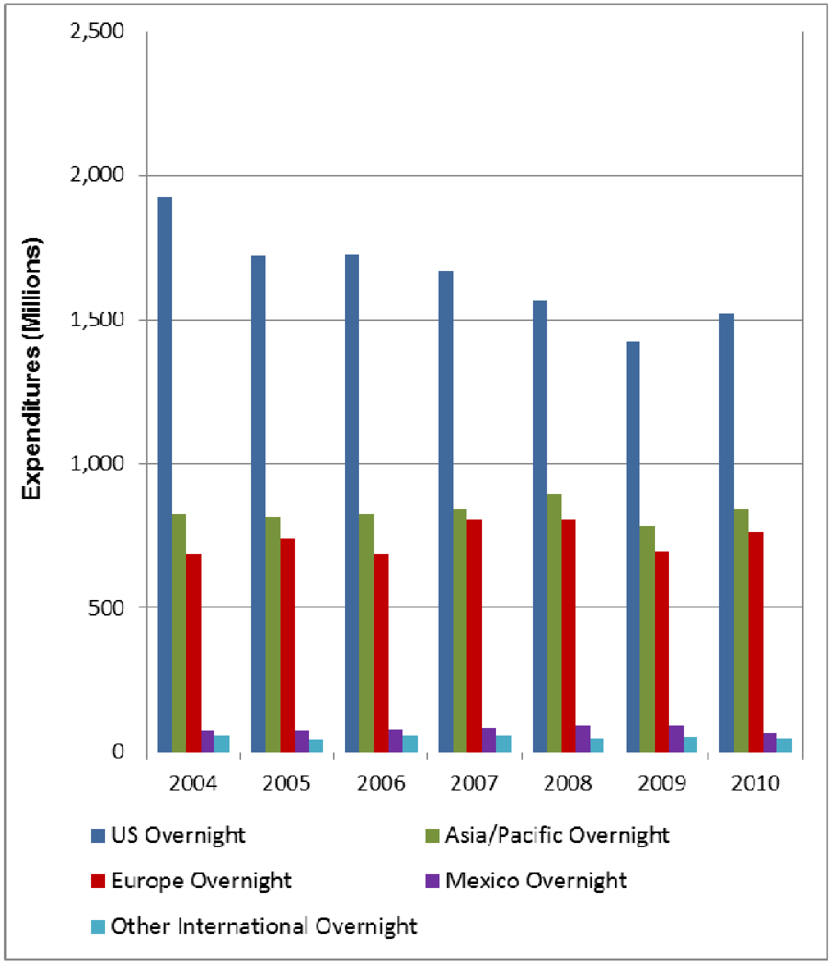




Source: Statistics Canada, Travel Survey of Residents of Canada and International Travel Survey

International Overnight Visitor Volume - BC (2004 – 2010) **International Overnight Visitor Revenue - BC (2004 – 2010) (millions)**





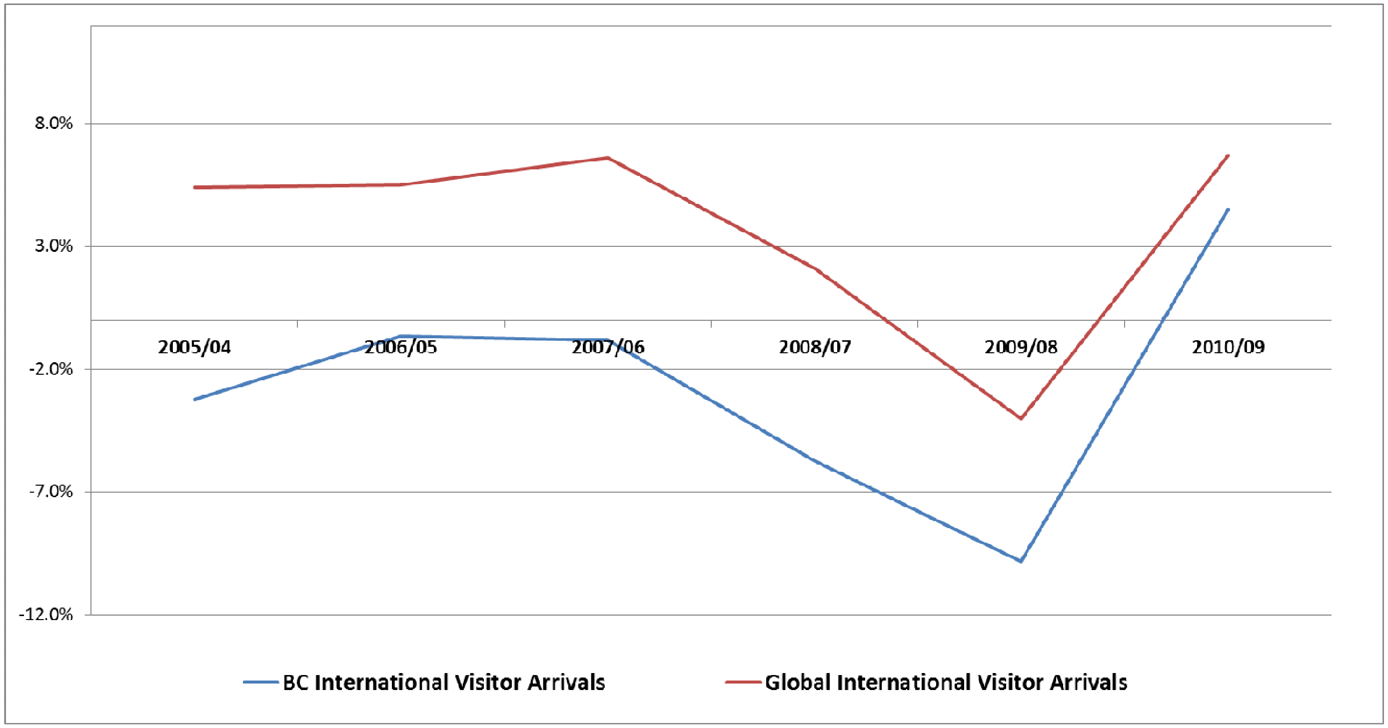
Sources: Tourism BC (Original sources: Statistics Canada, International Travel Survey, includes travellers who spent one or more nights in BC)

Global International Arrivals versus BC International Arrivals (2004–2010)

Arrivals	2004	2005	2006	2007	2008	2009	2010	Avg Annual Growth
BC international arrivals (millions)	5.15	4.98	4.95	4.91	4.63	4.17	4.36	-2.60%
World international arrivals (millions)	763	806	842	904	922	880	935	3.53%
BC’s share (%)	0.67	0.62	0.59	0.54	0.5	0.48	0.46	-6.18%

Sources: Tourism British Columbia (ITS Estimates) and World Tourism Organization

International Visitor Volume Growth: BC Compared to Global Arrivals (2004 – 2010)

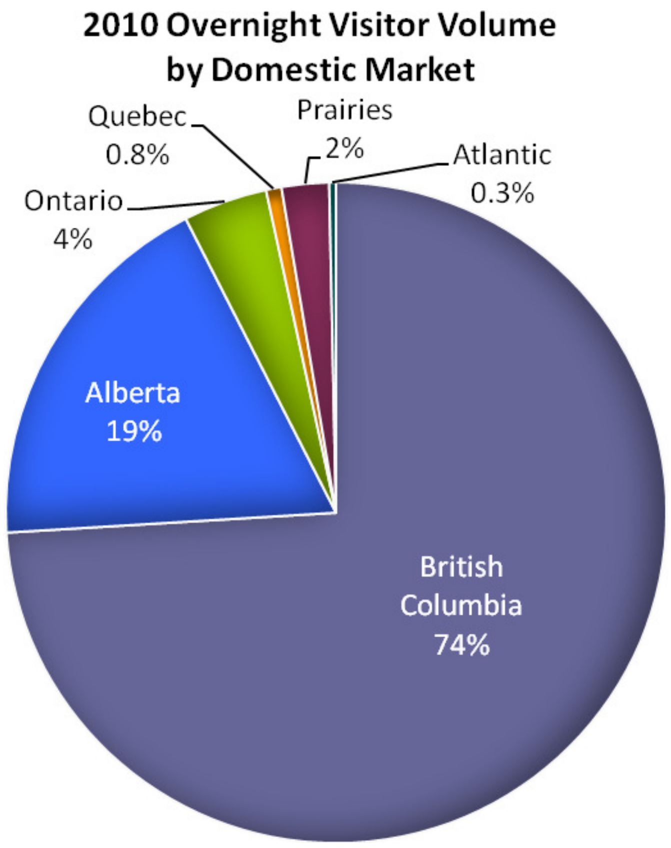


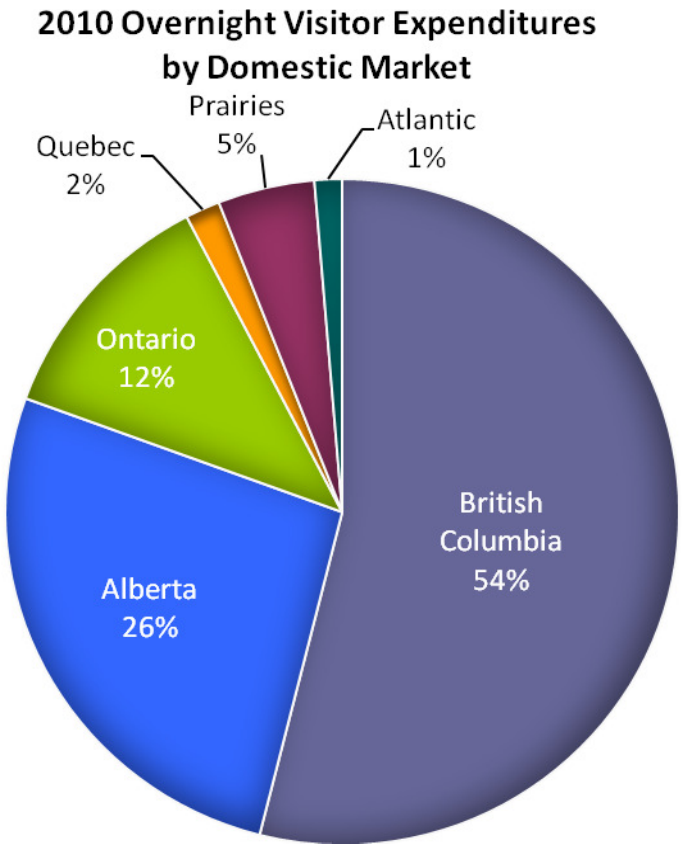
Sources: United Nations World Tourism Organization, World Tourism Barometer, February 2011 and Tourism BC (The Value of Tourism in BC 2009)

International Overnight Visitor Volume & Revenue (2004 – 2010) (Detailed)

	Visitors 2006	Revenue 2006	Visitors 2007	Revenue 2007	Visitors 2008	Revenue 2008	Visitors 2009	Revenue 2009	Visitors 2010	Revenue 2010	Visitors 2010/2006	Revenue 2010/2006
Total US	3,518	1,727	3,394	1,671	3,147	1,567	2,899	1,424	2,955	1,519	-16%	-12%
Washington	1,257	371	1,201	369	1,187	365	1,153	364	1,134	384	-10%	4%
Oregon	209	88	188	94	162	95	148	91	186	97	-11%	11%
California	488	329	474	323	419	290	375	246	414	261	-15%	-21%
Arizona	75	49	78	47	64	38	61	36	54	39	-27%	-21%
Florida	93	54	91	46	93	42	65	36	85	55	-9%	2%
Texas	136	92	127	80	117	83	118	77	91	72	-33%	-22%
Mexico	62	79	69	83	82	96	64	89	54	67	-13%	-15%
Asia/Pacific	744	824	765	844	738	898	611	786	713	845	-4%	3%
Japan	183	194	172	164	125	138	84	111	105	126	-42%	-35%
Taiwan	88	75	75	71	49	49	37	44	41	42	-54%	-43%
Hong Kong	58	53	63	58	77	70	60	59	69	64	20%	22%
Australia	119	144	144	177	142	191	129	172	126	166	6%	16%
South Korea	120	162	110	138	104	165	73	117	94	150	-22%	-8%
China	65	75	69	101	90	121	92	135	109	132	67%	76%
New Zealand	23	19	25	22	36	48	31	49	35	42	52%	118%
India	9	3	22	11	23	16	26	18	48	37	426%	1046%
Europe	576	687	635	808	624	807	557	698	601	764	4%	11%
United Kingdom	289	338	324	392	293	369	235	268	231	263	-20%	-22%
Germany	104	126	101	113	112	147	111	156	120	163	15%	30%
Netherlands	45	50	48	54	50	67	43	57	50	61	12%	22%
France	19	26	23	37	27	26	25	30	31	44	63%	66%
Other International	51	60	48	59	39	46	44	53	41	45	-20%	-25%
Total International	4,951	3,376	4,911	3,466	4,630	3,414	4,175	3,049	4,364	3,240	-12%	-4%

Sources: Tourism BC (Original sources: Statistics Canada, International Travel Survey (includes travellers who spent one or more nights in BC).

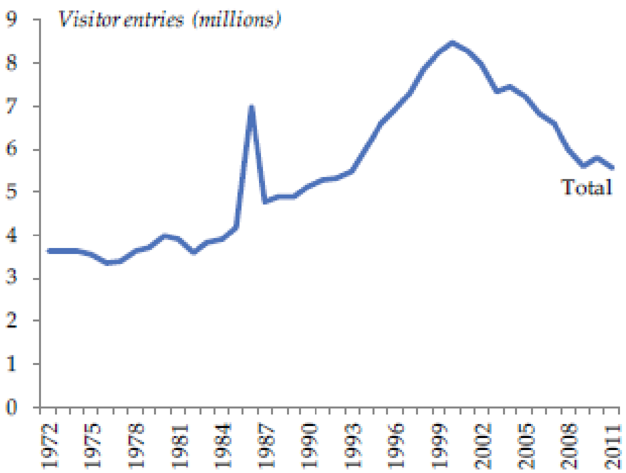




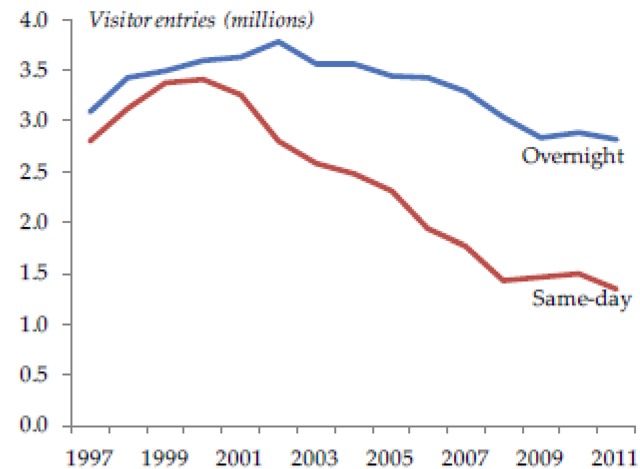
Source: The Value of Tourism in British Columbia, 2010, Tourism British Columbia

International Visitor Entries into Canada via British Columbia

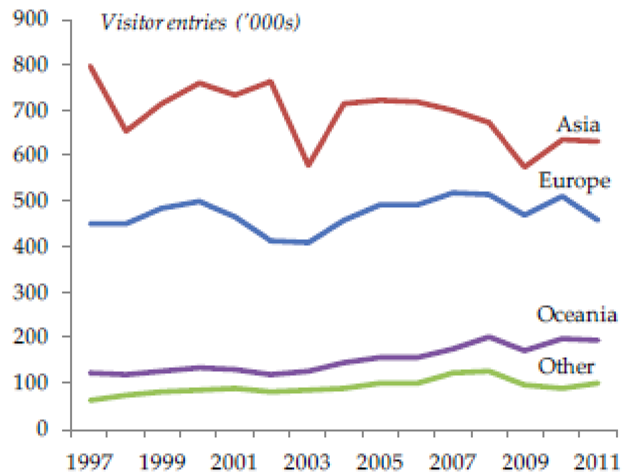
Total International Visitor Entries via British Columbia



Total US Visitor Entries via British Columbia



Total Non-US Visitor Entries via British Columbia



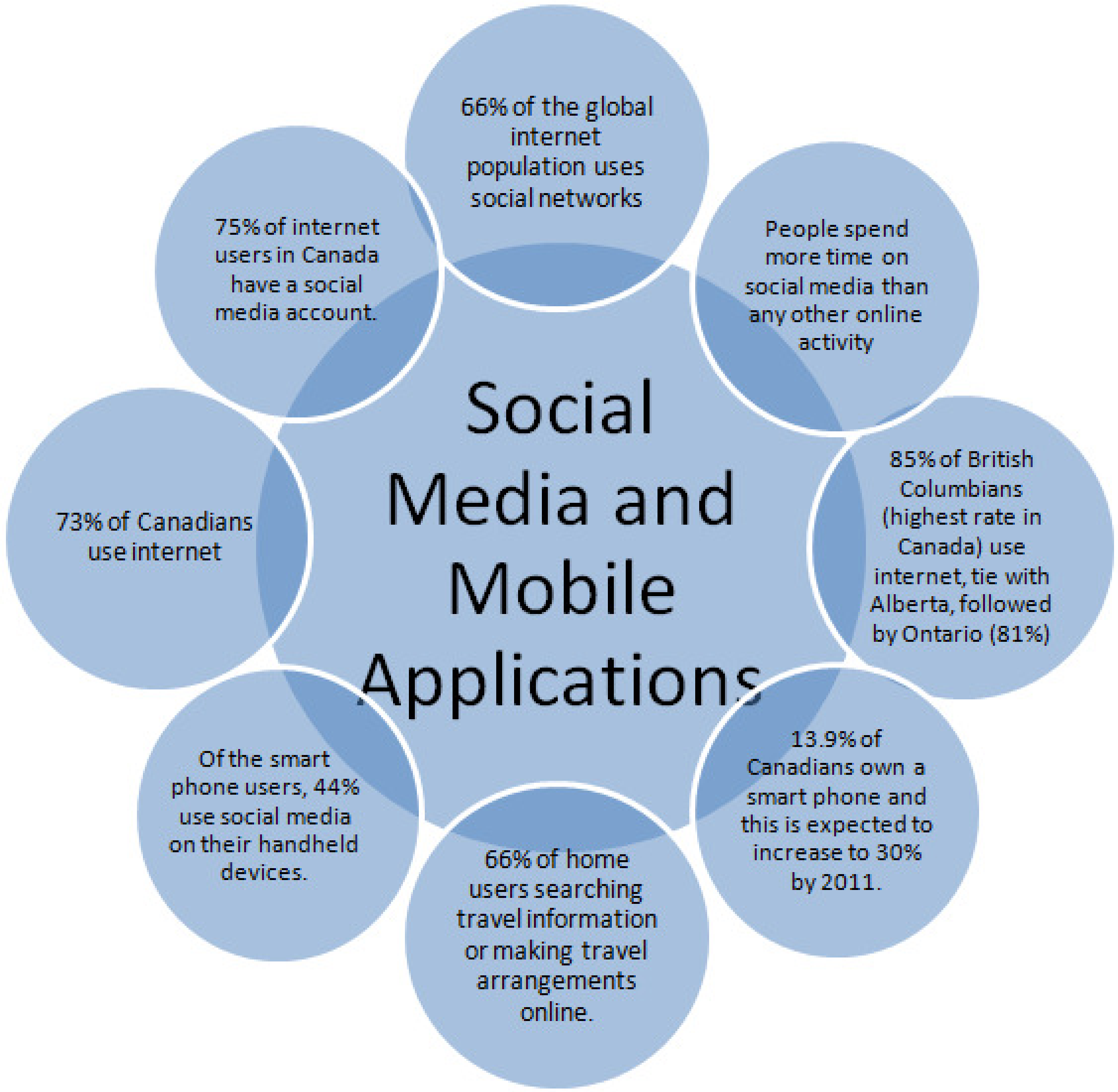
Source: BC Stats (2012) Visitor Entries 2011: A Year in Review.

BC Visitors – Age Profile

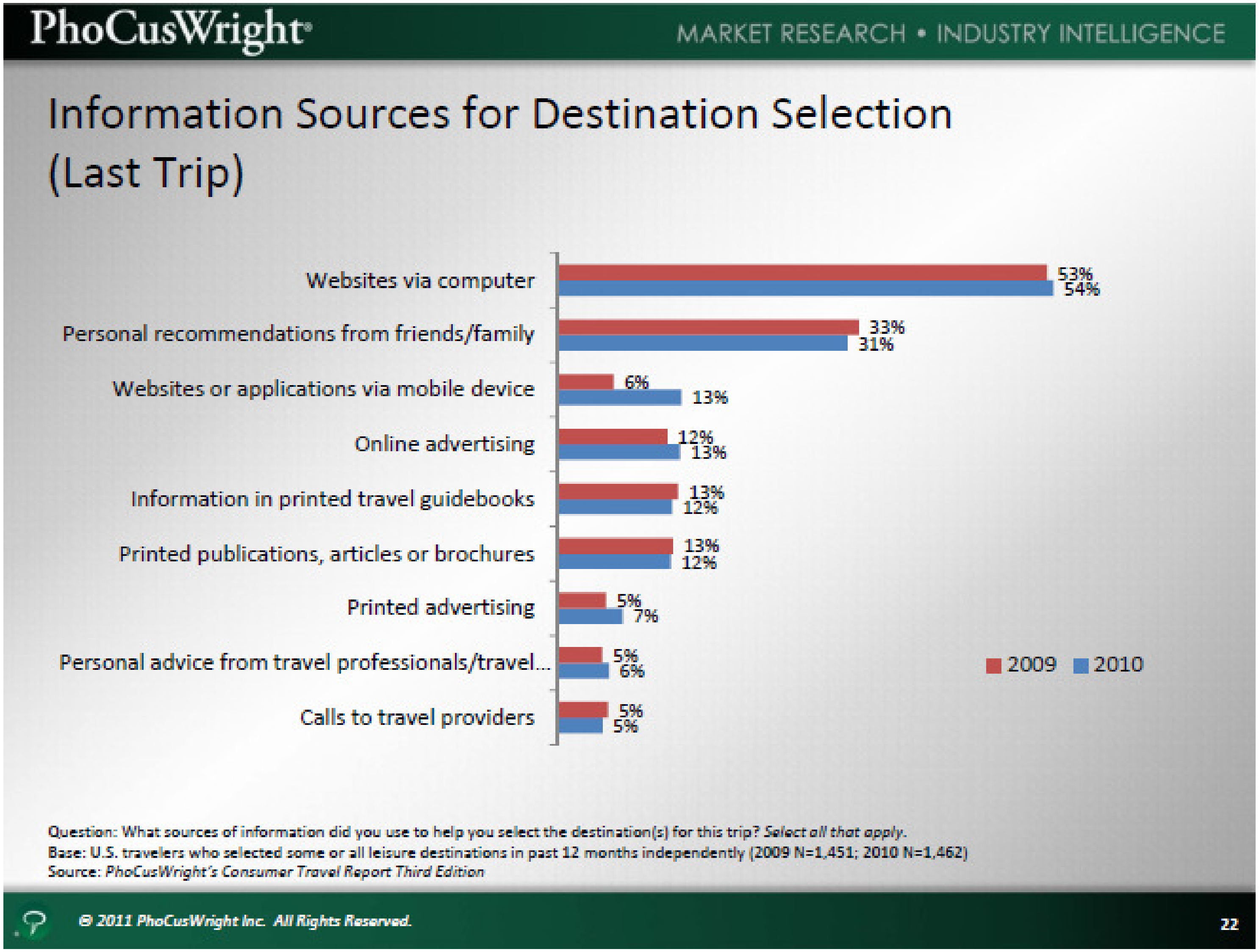
	Age					
	< 20	20-34	35-44	45 - 54	55 - 74	75+
UK	8.9%	19.0%	12.0%	15.2%	**41.3%**	3.5%
GER	10.6%	**26.2%**	19.6%	16.5%	25.1%	2.0%
JPN	7.8%	**40.5%**	**8.0%**	13.2%	29.9%	0.7%
KOR	14.9%	**30.1%**	22.3%	22.5%	10.1%	0.0%
USA	13.5%	11.4%	13.3%	19.2%	**37.6%**	5.1%
WASH	18.0%	14.7%	16.6%	18.9%	26.9%	4.9%
MEX	20.2%	29.4%	21.3%	11.5%	15.8%	1.8%

COMMUNITY TOURISM FOUNDATIONS

Internet, Social Media, Mobile App's


66% of the global internet population uses social networks
People spend more time on social media than any other online activity
85% of British Columbians (highest rate in Canada) use internet, tie with Alberta, followed by Ontario (81%)
13.9% of Canadians own a smart phone and this is expected to increase to 30% by 2011.
66% of home users searching travel information or making travel arrangements online.
Of the smart phone users, 44% use social media on their handheld devices.
73% of Canadians use internet
75% of internet users in Canada have a social media account.
Social Media and Mobile Applications

Information Sources for Destination Selection



PhoCusWright
MARKET RESEARCH • INDUSTRY INTELLIGENCE
Information Sources for Destination Selection (Last Trip)
Websites via computer
Personal recommendations from friends/family
Websites or applications via mobile device
Online advertising
Information in printed travel guidebooks
Printed publications, articles or brochures
Printed advertising
Personal advice from travel professionals/travel...
Calls to travel providers
53%
54%
33%
31%
6%
13%
12%
13%
13%
12%
13%
12%
5%
7%
5%
6%
5%
5%
2009
2010
Question: What sources of information did you use to help you select the destination(s) for this trip? Select all that apply.
Base: U.S. travelers who selected some or all leisure destinations in past 12 months independently (2009 N=1,451; 2010 N=1,462)
Source: PhoCusWright's Consumer Travel Report Third Edition
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4. Regional Research

The **2012 In-Market Consumer Research** was undertaken in late 2011 and early 2012 to provide the six tourism regions information on the perceptions from key markets including British Columbia, Alberta, Western Washington and Eastern Washington. This report includes information on the top factors for choosing a BC destination, familiarity with the regions, activities participated in, future trip types, seasonality, trip planning tools and reasons for being unlikely to visit the regions.

Key highlights for the Kootenay Rockies (KR) region taken from the British Columbia In-Market study conducted in November 2011 and April 2012 follow. A full report on the findings is available at www.jtst.gov.bc.ca/research

- Visitors to any BC region are looking for destinations which offer value for money, a place to relax and unwind and which serve as a good getaway from everyday life.
- Respondents from Alberta followed by 'Other BC' have the highest familiarity with the Kootenay Rockies region. Eastern Washington respondents are more familiar overall with the region than those from the Lower Mainland of BC.
- Key activities which motivated trips to the Kootenay Rockies were sightseeing, nature, wildlife viewing; visiting parks and visiting friends or relatives.
- It therefore follows that visitors to the region were likely to participate in sightseeing, nature, wildlife viewing; visiting parks, hiking and shopping on their trip.
- Half (49%) of respondents are likely to visit the region in the next two years, most likely for a 'mini-vacation' (3-5 nights), followed by a 'getaway' (1-2 nights). The majority of future trips to the Kootenay Rockies are planned for summer. Outdoor recreation activities and experiencing scenery and nature are key motivators for future trips.
- The Internet (on a computer as opposed to a mobile device) is heavily relied-upon for pre-trip planning, while information centres and online (at accommodations) are the most popular information sources during trips.
- Preferring to visit a different or international location and lack of interest in visiting or returning to the region were key reasons given by respondents that are unlikely to take a trip to the Kootenay Rockies in the next two years.
- Six-in-ten (59%) of respondents familiar with KR have a positive overall impression of the region, which ranks it 2nd out of the 6 British Columbia Tourism regions, behind Vancouver Island.

5. Sector Research

The following is a selection of sector research available through Tourism BC related to Rossland's key product offerings that motivate travel or contribute to the travel experience.

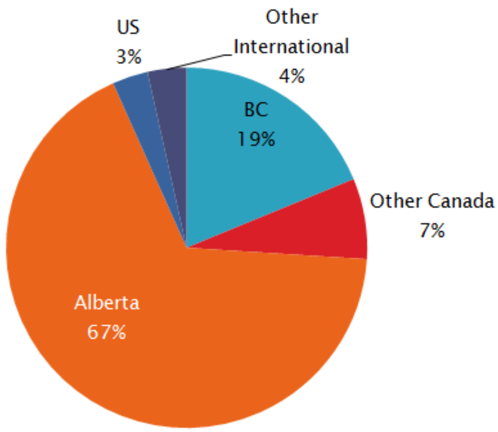
4.1 Mountain Biking

Tourism British Columbia: Mountain Bike Visitor Studies Golden/Rossland (2011)

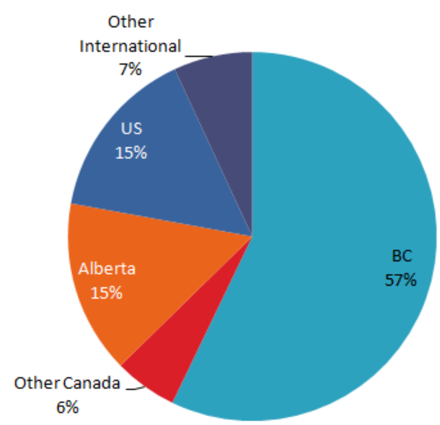
The below tables and graphs summarize the preliminary intercept findings of a mountain bike visitor study that was conducted in the communities of Rossland and Golden.

Origin

GOLDEN



ROSSLAND



Age

Golden:

	%
Under 24 Years	14.3%
25-34 Years	46.0%
35-44 Years	25.6%
45-54 Years	13.3%
55-64 Years	0.8%
65 Years or Older	0.0%

Rossland:

	%
Under 24 Years	3.8%
25-34 Years	31.7%
35-44 Years	28.0%
45-54 Years	26.3%
55-64 Years	8.6%
65 Years or Older	1.6%

Mode of Transportation

GOLDEN

	%
Car/Truck/MC	97.5%
RV	2.0%
Bus	0.5%

ROSSLAND

	%
Car/Truck/MC	95.7%
RV	2.1%
Bicycle	1.6%
Other	0.5%

Primary Accommodation

GOLDEN

	%
Campground/RV	36.0%
Hotel/Motel	21.3%
Resort	15.5%
Friends OR Relatives	9.9%
Second Home	8.2%
Rental House/Condo	4.1%
B&B	3.2%
Hostel	0.9%
Other	0.9%

ROSSLAND

	%
Campground/RV	35.2%
Friends OR Relatives	32.7%
Hotel/Motel	9.1%
Rental House/Condo	8.5%
Second Home	6.1%
B&B	3.6%
Other	4.8%

Mtb Preference

GOLDEN	%	ROSSLAND	%
Cross Country/All Mountain	65.9%	Cross Country/All Mountain	88.2%
Downhill	85.0%	Downhill	16.1%
Freeriding	31.0%	Freeriding	19.4%
Bike Skills/Dirt Jumping	17.3%	Bike Skills/Dirt Jumping	4.3%

Level of Experience

GOLDEN	%	ROSSLAND	%
Beginner	6.4%	Beginner	4.8%
Intermediate	31.8%	Intermediate	31.7%
Advanced	38.7%	Advanced	48.9%
Expert	23.1%	Expert	14.5%

Type of Bike

GOLDEN	%	ROSSLAND	%
Rented Bike	18.8%	Rented Bike	3.8%
Personal Bike	81.0%	Personal Bike	90.3%
Borrowed Friend/Family's Bike	0.3%	Borrowed Friend/Family's Bike	5.4%

Tourism British Columbia: Tourism Business Essentials – Mountain Bike Tourism (2008)/Situation Analysis (2010)

Tourism Business Essentials 2008 states that the benefits of mountain biking as a tourism product have been enjoyed to some extent by BC communities for over a decade, since mountain bike-specific trails began to emerge in the 1990s. The benefits are three fold:

1. Economic - One of the most compelling benefits of trails is their ability to provide an economic return to communities by attracting riders from out of town

2. Environmental - Active management and planning of trail systems has led to rehabilitation of natural landscapes and a decrease in unauthorized trail construction and use

3. Social - Engaging the younger generations in biking- related projects and providing opportunities for families to promote and practice a healthy lifestyle

The above benefits are becoming more evident in traveller motivation studies and economic impact research. The same studies have addressed two major misconceptions about the mountain biking sector:

1. Mountain biking is in fact a travel motivator and people will travel to destinations specifically to go mountain biking,

2. Mountain bikers are well educated, prosperous, and the bulk of them are over 30 years of age

It is estimated that over 700,000 Canadians actively participate in cycling and mountain biking on a regular basis. Representing an important part of the tourism market in British Columbia, the mountain bike tourism industry has a substantial opportunity to realize significant growth. Currently, one in every twenty visitors to British Columbia, on an annual basis, comes to enjoy the magnificent product that it has to offer. The province has played host to approximately 6 million visitors from 2006-2007, which represented 30% of the total domestic overnight pleasure travellers. Of the 6 million visitors, it is estimated that mountain bike travellers represent approximately 2%. These numbers identify a potential for significant increase in the market share being realized in British Columbia. Understanding the consumer will improve the probability of successfully making British Columbia a world class destination for mountain bike tourists.

Demographics (Domestic):[1]

Age:

- 1 in 5 are between 18-25 years of age
- 1 in 4 are between 25-34 years of age
- 1 in 4 are between 35-44 years of age
- Less than 1 in 5 are between 45-54
- 1 in 10 are over the age of 55
- 1 in 52 are over the age of 65

Gender:

- 75.5% of mountain bikers are male

Income:

- More than 1 in 3 mountain bikers have an annual income greater than $100,000
- Majority of mountain bikers are full-time paid employees

[1] Information on demographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

Education:
- Approximately two-thirds of cyclists and mountain bikers have a post-secondary diploma or a University degree

Geographics:[2]

Domestic:
- There are significant populations of mountain bikers in each province
- Higher collectives in British Columbia, Ontario, and Quebec
- Mountain bikers are least likely to live in the Maritimes or prairie provinces such as Alberta or Saskatchewan
- 1 in 7 Canadian Mountain Bikers live in Vancouver, BC
- Over 50% of Canadian Mountain Bikers have been to BC on an overnight pleasure trip

Travellers from the United States:
- Approximately 305,000 mountain biking tourists travelled to British Columbia from the U.S. representing 6% of the pleasure travel population
- Mountain bikers are three time more likely to travel to British Columbia because of its reputation as a world class reputation for mountain biking
- BC has attracted 12.8% of the US mountain biking market
- Significant population of mountain bikers live in the Pacific states: Washington, Oregon, and California
- California is home to approximately one quarter of the US mountain biking market
- 63% of travellers from the US are male
- On a ten point scale, Hawaii was rated as the most favourable destination for mountain biking with a grade of 8.7, while British Columbia received a grade of 7.1, placing it fourth behind Hawaii, Colorado, and California respectively

[2] Information on geographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

Psychographics:[3]

Decision Making:

- Mountain bikers will decide their destination with safety as a high priority
- Are image oriented and will seek information regarding a location based on its perceived image
- The area must maintain the following elements to maximize the potential that mountain bikers will choose it:
  - Safe environment
  - Pose no health concerns
  - Convenient access by car
  - Many activities for adults
  - Opportunity to sight see
  - Offer mid-range accommodations or camping

Information Resources:

- 7 in 10 mountain bikers rely on the internet to provide them with travel information
- 6 in 10 rely on information they have received from friends and relatives
- 5 in 10 use their own past experience to make decisions
- 4 in 10 will utilize maps and Visitor Information Centres
- 3 in 10 rely on official travel guides, travel agents, and newspapers

[3] Information on psychographics was sourced from Tourism BC activity profile with a focus on recreational cycling and mountain biking, authored by Nicolette Douglas of Nicolette Douglas Consulting | Research dated November 2008

4.2 Alpine Skiing

Canadian and American Alpine Ski Tourists

In 2004/2005, 1.2 million Canadian and 1.2 million American travellers participated in Alpine Ski activities and have visited British Columbia.[4] Alpine Ski Tourists are defined as visitors who engage in at least one of the following activities: downhill skiing, snowboarding or heli-skiing. Downhill Skiing activities were the primary motivation for 87% of Canadian Tourists and 82% for American Alpine Ski Tourists.

[4] Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia.

Canadian Alpine Ski Tourists - Visitors to BC

A total of 1.2 million Canadian travellers participated in alpine skiing on pleasure trips in the past two years. Fewer (837,302) were motivated to take a pleasure trip for alpine skiing.

The percentage of Canadian Alpine Ski Tourists who have recently travelled to British Columbia skews slightly toward men (55.6% participated and 56.9% motivated). Canadian Alpine Ski Tourists are more likely to be younger with almost half of them under 34 years of age (48.1% participated and 46.9% motivated).

Almost half of Canadian Alpine Ski Tourists who have taken recent trips to BC are from high household income families ($100,000 or more). About two thirds have a post secondary degree.

Over half of Canadian Alpine Ski Tourists with recent trips to BC live in adult-only households (58.8% participated and 56.1% motivated). More than a third live with young children under 17 years of age (35.6% participated and 37.9% motivated).

Demographics of Canadian Alpine Ski Tourists with Recent Pleasure Trips to BC		
	Participate	Motivate
Adults 18 +	1,214,761	837,302
Unweighted Numbers	1,426	1,033
Gender		
Male	55.6%	56.9%
Female	44.4%	43.1%
Age		
18-34	48.1%	46.9%
35-44	23.0%	23.1%
45-54	19.4%	19.4%
55-64	7.3%	8.5%
65 +	2.2%	2.1%
Household income		
Under $40,000	12.6%	11.7%
$40,000-$59,999	9.8%	10.4%
$60,000-$99,999	24.9%	23.8%
$100,000 or more	42.0%	45.2%
Don't Know/Not Stated	10.7%	8.9%
Education		
Less than secondary	2.8%	2.7%
Completed secondary	17.8%	16.7%
Some post secondary	12.7%	11.1%
Graduated post secondary	66.2%	69.1%
Not Stated	0.5%	0.4%
Household composition		
Adult only	58.8%	56.1%
Any teens/children	40.3%	43.0%
Children under 17	35.6%	37.9%
Not Stated	0.9%	0.9%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding **and** have visited British Columbia in the past two years. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

British Columbia has attracted 45% of Canadian Alpine Ski Tourists over the last two-year period. This percentage is higher than Alberta (36.8%) and the Atlantic provinces (19.9%) but lower than Ontario (59.9%), Quebec (51.1%) and the United States (65.3%).

British Columbia is a noticeably more popular tourism destination for Alpine Ski Tourists among its own residents (95.1%). In addition to domestic provinces, British Columbia competes for winter travel with the United States. Over a two-year period, the U.S. has attracted 71.1% of Alpine Ski Tourists from British Columbia.

Among the Canadian travellers who took trips motivated by alpine skiing, almost half of them (45.5%) visited British Columbia in the past two years.

Locations Visited in Past Two Years by Canadian Alpine Ski Tourists **(Participated)** Residents of….

	Canada	British Columbia
Adults 18+	2,701,429	443,717
Unweighted Numbers	2,928	456
BC	45.0%	95.1%
Alberta	36.8%	55.0%
Ontario	59.9%	27.4%
Quebec	51.1%	13.5%
Atlantic	19.9%	8.6%
Any U.S.	65.3%	71.1%
Mexico/Caribbean	34.0%	33.4%
Europe	23.1%	23.2%
Other Countries	18.8%	31.0%

Locations Visited in Past Two Years by Canadian Alpine Ski Tourists **(Motivated)** Residents of….

	Canada	British Columbia
Adults 18+	1,840,712	309,889
Unweighted Numbers	2,001	328
BC	45.5%	94.0%
Alberta	38.2%	61.0%
Ontario	60.0%	29.6%
Quebec	51.7%	13.7%
Atlantic	17.8%	8.5%
Any U.S.	67.0%	73.1%
Mexico/Caribbean	34.2%	37.7%
Europe	23.9%	28.2%
Other Countries	18.3%	26.0%

Not surprisingly, alpine skiing is the most popular sport among Canadian Alpine Ski Tourists (84.1% participated and 86.6% motivated). Quite to the contrary, the other top three popular sports are related to summer and water related activities such as sunbathing/sitting on a beach and swimming in lakes and oceans.

In addition, Canadian Alpine Ski Tourists participated in a variety of outdoor activities when on trips. Forty percent visited a nature/national/ provincial park. Over a third went on a same day excursion hiking trip. It is noteworthy that Canadian Alpine Ski Tourists are interested in participating in an occasional game of golf during their travel (30.1% participated) but there appears to be very little interest in staying at a golf resort (7.5%).

In general, Alpine Ski Tourists from British Columbia do not differ substantively from the national market in their outdoor activity interests. The most significant difference lies in that Alpine Ski Tourists from British Columbia demonstrate a much higher interest in snowboarding (40.3% participated) than does the national market (29.3% participated).

Participation in Outdoor Activities on Trips in Past Two Years by Canadian Alpine Ski Tourists
Residents of…

	Participate CAN	Participate BC	Motivate CAN	Motivate BC
Adults 18+	2,701,429	443,717	1,840,712	309,889
Unweighted Numbers	2,928	456	2,001	328
Skiing - Downhill	84.1%	73.1%	86.6%	80.6%
Sunbathing/Sitting On A Beach	60.4%	60.6%	61.6%	62.0%
Swimming In Lakes	60.4%	58.0%	60.7%	63.1%
Swimming In Oceans	44.9%	45.2%	44.3%	52.3%
Nature Park- National/Provincial	40.0%	46.1%	39.4%	40.2%
Hiking - Same Day Excursion	37.8%	49.2%	38.9%	47.6%
Motor Boating	31.4%	28.7%	32.2%	33.5%
Golfing - Occasional Game	30.1%	26.3%	31.9%	30.3%
Snowboarding	29.3%	40.3%	28.7%	34.7%
Fishing - Fresh Water	28.9%	23.7%	29.4%	26.1%
Ice-Skating	28.3%	22.5%	25.2%	16.4%
Kayaking/Canoeing - Freshwater	27.0%	20.5%	27.1%	17.1%
Cycling - Same Day Excursion	25.2%	32.7%	25.1%	31.7%
Fitness - Jog/Exercise Outdoors	23.9%	29.3%	21.5%	24.7%
Snorkeling In Sea /Ocean	23.4%	27.7%	23.6%	32.7%
Mini-Golf	21.5%	17.7%	20.9%	19.2%
Fitness - In A Fitness Centre	20.1%	20.4%	17.6%	14.5%
Water Skiing	18.5%	19.0%	18.8%	21.5%
Wildlife - Land Based Animals	17.9%	21.0%	17.4%	20.5%
Skiing - Cross Country	17.5%	21.8%	15.6%	18.6%
Hiking / Backpack Overnight	16.5%	23.7%	17.5%	25.8%
Wildlife - Whale/Marine	16.5%	19.0%	15.7%	20.8%
Cycling - Mountain Biking	14.0%	25.9%	14.1%	24.8%
Wildflowers / Flora Viewing	13.5%	18.6%	11.8%	13.3%
All Terrain Vehicle Same Day	12.3%	12.6%	11.2%	12.5%
Sailing	10.9%	12.6%	10.9%	15.6%
Wildlife - Bird Watching	10.9%	11.3%	9.5%	11.8%
Kayaking/ Canoeing - Ocean	10.5%	15.4%	9.1%	16.0%
Snowshoeing	10.3%	11.0%	9.6%	6.7%
Horseback Riding - Same Day	10.2%	10.6%	10.6%	12.4%
In-Line / Roller Blading	9.5%	11.7%	8.7%	6.3%
Viewing Northern Lights	9.3%	6.9%	9.6%	8.6%
Climbing - Mountain/Trekking	9.0%	11.6%	9.4%	11.1%
White Water Rafting	8.6%	9.0%	9.0%	9.3%
Snowmobiling - Day Use	8.0%	9.5%	7.2%	10.2%
Golfing - Stay At A Golf Resort	7.5%	5.8%	8.0%	5.9%
Scuba Diving In Sea /Ocean	7.4%	8.6%	7.2%	9.9%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

Canadian Alpine Ski Tourists are most likely to take a stroll in a city to see buildings (50.6%), visit historic site/ buildings (41.0%) or visit amusement parks (36.7%).

Few differences exist in cultural activities between those Alpine Ski Tourists that participated in alpine skiing during their travel and those that were motivated by alpine skiing to take a pleasure trip.

Activity preferences between all Canadian Alpine Ski Tourists and those of them who live in British Columbia differ more in degree than in content.

Canadian Alpine Ski Tourists are slightly more likely to participate in outdoor activities than cultural activities on their pleasure trips.

Participation in Cultural Activities or Attractions on Trips in Past Two Years by Canadian Alpine Ski Tourists
Residents of…

	Participate CAN	Participate BC	Motivate CAN	Motivate BC
Adults 18+	2,701,429	443,717	1,840,712	309,889
Unweighted Numbers	2,928	456	2,001	328
Stroll A City To See Buildings	50.6%	52.0%	51.5%	52.5%
Historic Site/Buildings	41.0%	44.2%	41.2%	44.0%
Amusement Park	36.7%	37.2%	35.9%	39.1%
Well Known Natural Wonders	35.4%	36.6%	35.6%	31.2%
Other Historic Sites/Buildings	33.1%	37.2%	33.1%	33.6%
Museum - History/Heritage	31.3%	39.1%	30.8%	35.5%
Art Galleries	29.2%	34.5%	28.3%	32.6%
Free Outdoor Performances	27.1%	26.7%	26.0%	25.3%
Rock & Roll/Popular Concert	25.0%	21.0%	25.7%	25.1%
Firework Displays	24.5%	28.1%	22.6%	20.8%
Farmers' Markets/ Country Fair	23.7%	32.9%	21.7%	28.4%
Live Theatre	23.5%	18.3%	22.9%	20.1%
Zoos	23.4%	18.5%	22.2%	20.7%
Hands-On Learning Activities	22.6%	26.3%	21.1%	21.3%
Aquariums	21.5%	21.5%	21.2%	23.8%
Botanical Gardens	20.0%	22.4%	19.2%	18.6%
Water Theme Park	19.3%	15.3%	17.8%	17.0%
Museum - Science/Technology	18.5%	22.5%	18.1%	19.1%
Stand-Up Comedy/Variety Shows	16.5%	14.0%	13.7%	10.6%
Exhibition Or Fairs	15.7%	23.4%	16.0%	27.3%
Museum - Military / War	14.9%	17.0%	13.1%	13.3%
Historical Replica/Re-Enactment	14.1%	20.8%	11.7%	15.8%
Science & Technology Theme Park	13.9%	16.7%	11.2%	9.8%
Paleo/Archaeological Sites	13.3%	19.2%	11.5%	12.9%
Music Festivals	12.2%	11.9%	12.9%	13.5%
Carnivals	11.9%	8.1%	12.2%	9.1%
Live Theatre With Dinner	10.4%	10.6%	9.9%	6.2%
Garden Theme Park	10.3%	13.2%	8.3%	5.1%
Entertainment Farms	10.3%	12.7%	9.5%	12.9%
Food / Drink Festivals	10.2%	10.4%	9.8%	10.7%
Aboriginal Heritage Attractions	9.8%	13.9%	10.0%	14.2%
Ballet/Other Dance Performances	9.0%	7.2%	9.7%	7.9%
Jazz Concert	9.0%	8.0%	9.7%	10.6%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

American Alpine Ski Tourists - Visitors to BC

A total of 1.2 million American travellers participated in alpine skiing on pleasure trips in the past two years. Fewer (894,550) were motivated to take a pleasure trip by alpine skiing.

Almost two thirds of American Alpine Ski Tourists who have recently travelled to British Columbia are men (65.9% participated and 67.0% motivated). Over a third of American Alpine Ski Tourists are under 34 years of age (37.0% participated and 37.1% motivated). The next biggest age group are those who are between 45 and 54 years of age (26.4% participated and 25.5% motivated).

Almost half of American Alpine Ski Tourists who have taken recent trips to BC are from high household income families ($100,000 or more). About three quarters have a post secondary degree.

The majority of American Alpine Ski Tourists with recent trips to BC live in adult-only households (61.2% participated and 62.3% motivated). More than one fifth live with young children under 17 years of age (22.2% participated and 20.9% motivated).

Demographics of American Alpine Ski Tourists with Recent Pleasure Trips to BC

	Participate	Motivate
Adults 18 +	1,197,946	894,550
Unweighted Numbers	385	291
Gender		
Male	65.9%	67.0%
Female	34.1%	33.0%
Age		
18-34	37.0%	37.1%
35-44	21.7%	21.5%
45-54	26.4%	25.5%
55-64	9.2%	10.0%
65 +	5.7%	6.0%
Household income		
Under $40,000	12.2%	11.5%
$40,000-$59,999	6.7%	6.6%
$60,000-$99,999	24.9%	25.5%
$100,000 or more	46.3%	46.7%
Don't Know/Not Stated	10.0%	9.7%
Education		
Less than secondary	1.6%	0.5%
Completed secondary	4.5%	5.0%
Some post secondary	18.2%	18.7%
Graduated post secondary	73.2%	72.8%
Other	1.5%	1.8%
Not Stated	1.0%	1.4%
Household composition		
Adult only	61.2%	62.3%
Any teens/children	37.8%	36.3%
Children under 17	22.2%	20.9%
Not Stated	1.1%	1.4%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

Almost all Americans in the Alpine Ski Tourist market segment travelled within the United States in the past couple of years and nearly 1-in-4 travelled exclusively in the United States. The visitation to British Columbia (8.7%) is slightly higher than that to Alberta (2.3%), but lower than Ontario (13.1%).

A quarter of American Alpine Ski Tourists travelled to Canada (24.8%) whereas fewer American Alpine Ski Tourists who live in California travelled to Canada (17.6%).

Few differences exist in destinations visited between those American Alpine Ski Tourists that participated in alpine skiing during their travel and those that were motivated by alpine skiing to take a pleasure trip.

Locations Visited in Past Two Years by American Alpine Ski Tourists **(Participated)**
Residents of….

	U.S.	California
Adults 18+	13,753,221	2,899,120
Unweighted	3,699	582
Any U.S.	99.9%	100.0%
Only U.S.	39.4%	35.5%
British Columbia	8.7%	11.2%
Alberta	2.3%	2.6%
Ontario	13.1%	6.5%
Any Canada	24.8%	17.6%
Mexico/Caribbean	34.8%	39.5%
Other Countries	19.5%	18.9%
Not Stated	17.8%	23.6%

Locations Visited in Past Two Years by American Alpine Ski Tourists **(Motivated)**
Residents of….

	US	California
Adults 18+	9,797,578	2,141,675
Unweighted	2,628	430
Any U.S.	99.9%	100.0%
Only U.S.	39.4%	35.6%
British Columbia	9.1%	12.0%
Alberta	2.7%	2.9%
Ontario	13.1%	6.1%
Any Canada	25.1%	18.3%
Mexico/Caribbean	36.2%	40.8%
Other Countries	19.6%	19.0%
Not Stated	17.5%	23.9%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

Similar to the Canadian market, alpine skiing is the most popular sport among American Alpine Ski Tourists (79.3% participated and 81.6% motivated).

American Alpine Ski Tourists also participated in a variety of outdoor activities during their travel with at least a third of them swimming in oceans, sunbathing/sitting on beaches, visiting nature/national/ provincial parks, taking same day excursion hiking trips, swimming in lakes or participating in snowboarding.

In general, activity preferences between American Alpine Ski Tourists and those who live in California differ more in degree rather than in content. The most significant difference is that Alpine Ski Tourists from California demonstrate a much higher interest in snowboarding (50.1% participated) than does the overall American market (32.1% participated).

Participation in Outdoor Activities on Trips in Past Two Years by American Alpine Ski Tourists

Residents of…	Participate U.S.	Participate California	Motivate U.S.	Motivate California
Adults 18+	13,753,221	2,899,120	9,797,578	2,141,675
Unweighted Numbers	3,699	582	2,628	430
Skiing - Downhill	79.3%	62.6%	81.6%	65.2%
Swimming In Oceans	50.0%	42.6%	50.4%	44.2%
Sunbathing/Sitting On A Beach	49.0%	44.0%	49.0%	44.5%
Nature Park- National/Provincial	34.9%	34.7%	34.6%	34.6%
Hiking - Same Day Excursion	33.4%	38.3%	33.1%	37.3%
Swimming In Lakes	33.3%	29.5%	31.6%	27.7%
Snowboarding	32.1%	50.1%	30.3%	49.1%
Snorkeling In Sea /Ocean	28.6%	33.4%	28.5%	34.7%
Fitness - In A Fitness Centre	24.0%	28.0%	23.3%	26.3%
Fishing - Fresh Water	22.7%	23.4%	21.4%	21.9%
Mini-Golf	22.3%	17.4%	21.4%	15.6%
Golfing - Occasional Game	22.1%	18.4%	22.6%	18.7%
Fitness - Jog/Exercise Outdoors	21.6%	24.2%	20.5%	21.4%
Motor Boating	20.6%	22.6%	20.4%	22.9%
Wildlife - Land Based Animals	16.7%	16.5%	14.8%	13.4%
Horseback Riding - Same Day	16.0%	16.9%	15.1%	17.2%
Water Skiing	15.9%	18.7%	15.8%	18.7%
Kayaking/Canoeing - Freshwater	14.7%	11.1%	14.5%	11.5%
Cycling - Same Day Excursion	13.7%	14.7%	13.0%	12.5%
Fishing - Salt Water	13.0%	10.8%	12.7%	11.1%
Hiking / Backpack Overnight	12.7%	13.2%	12.5%	11.9%
All Terrain Vehicle Same Day	12.3%	16.6%	12.4%	18.2%
White Water Rafting	12.0%	9.8%	12.5%	11.1%
Wildlife - Whale/Marine	11.6%	11.9%	11.0%	11.5%
Ice-Skating	11.5%	10.6%	10.7%	10.6%
Scuba Diving In Sea /Ocean	10.4%	10.9%	10.1%	11.5%
Wildflowers / Flora Viewing	10.4%	11.3%	9.8%	10.0%
Snowmobiling - Day Use	10.0%	8.9%	9.9%	9.7%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

American Alpine Ski Tourists are most likely to visit amusement parks (48.7%), take a stroll in a city to see buildings (42.3%) and visit historic sites/ buildings (40.2%).

Few differences exist in cultural activities between those Alpine Ski Tourists that participated in alpine skiing during their travel and those that were motivated by alpine skiing to take a pleasure trip.

Activity preferences between all American Alpine Ski Tourists and those of them who live in California differ more in degree than in content.

Similar to the Canadian market, American Alpine Ski Tourists are slightly more likely to participate in outdoor activities than cultural activities on their pleasure trips.

Participation in Cultural Activities or Attractions on Trips in Past Two Years by American Alpine Ski Tourists
Residents of…

	Participate U.S.	Participate California	Motivate U.S.	Motivate California
Adults 18+	13,753,221	2,899,120	9,797,578	2,141,675
Unweighted Numbers	3,699	582	2,628	430
Amusement Park	48.7%	49.4%	48.4%	50.3%
Stroll A City To See Buildings	42.3%	38.4%	42.2%	36.6%
Historic Site/Buildings	40.2%	37.3%	41.0%	37.6%
Other Historic Sites/Buildings	31.9%	30.3%	32.5%	30.7%
Well Known Natural Wonders	31.4%	31.8%	31.2%	32.1%
Aquariums	31.2%	33.1%	31.1%	33.2%
Zoos	29.5%	28.3%	28.9%	30.5%
Museum - History/Heritage	27.1%	25.8%	26.7%	23.7%
Firework Displays	26.8%	25.3%	26.2%	24.7%
Farmers' Markets/ Country Fair	24.4%	27.1%	23.6%	26.2%
Art Galleries	24.3%	24.8%	25.2%	27.1%
Rock & Roll/Popular Concert	23.5%	24.3%	23.4%	24.1%
Free Outdoor Performances	23.2%	21.9%	21.8%	21.1%
Water Theme Park	22.5%	17.9%	21.9%	17.3%
Museum - Science/Technology	22.4%	22.0%	22.8%	22.0%
Live Theatre	20.5%	20.9%	20.4%	19.9%
Stand-Up Comedy/Variety Shows	18.8%	18.4%	17.9%	17.6%
Botanical Gardens	18.6%	16.8%	17.9%	16.8%
Food / Drink Festivals	18.4%	20.5%	18.3%	21.2%
Exhibition Or Fairs	15.1%	13.8%	14.8%	14.6%
Museum - Military / War	15.1%	12.6%	14.9%	12.8%
Carnivals	14.1%	16.1%	13.9%	16.7%
Movie Theme Park	13.1%	13.9%	13.4%	16.1%
Music Festivals	12.4%	11.3%	12.2%	11.4%
Historical Replica/Re-Enactment	11.1%	10.9%	10.9%	10.4%
Museum - Children's	10.8%	12.4%	10.4%	12.4%
Entertainment Farms	10.7%	9.4%	10.5%	10.6%
Planetarium	9.7%	9.6%	9.3%	9.5%
Ballet/Other Dance Performances	9.5%	11.6%	9.0%	10.9%
Science & Technology Theme Park	9.4%	10.1%	9.3%	10.2%
Classical/Symphony Concert	9.3%	9.2%	9.1%	7.8%
Aboriginal Heritage Attractions	9.0%	10.2%	8.5%	8.8%

Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia. Alpine Ski Tourists include those who participated in at least one of the following: Downhill skiing, Heli-skiing or Snowboarding. Travellers are separated into two categories, those who have participated in at least one Alpine Skiing activity while on a trip and those who were motivated to take a trip (main reason) to participate in an Alpine Skiing activity in the past two years.

4.3 Nordic

Tourism British Columbia: British Columbia Nordic Ski Facility Client Survey (2007-2008)

The BC Nordic Ski Facility Client Survey research was conducted by Tourism British Columbia in partnership with the BC Nordic Marketing Society (BCNMS) and various Nordic ski facilities, and was initiated through the Experiences BC program at Tourism British Columbia. The research was intended to further develop business owners' understanding of their clients and to provide information in order to support and create sound marketing decisions. Below are some of the highlights of the research on Nordic skiers in British Columbia; the full report is available at:
http://www.jti.gov.bc.ca/research/ResearchbyActivity/pdfs/all_activity_reports/British_Columbia_Nordic_Ski_Facility_Client_Report_2007-2008.sflb.pdf

A Client Card was randomly distributed by volunteer businesses between December 2007 and March 2008. Nordic skiers (18 years and over) were randomly selected and provided a client card to complete. Among other questions, the Client Card asked if the nordic skiers would be willing to participate in a follow-up Mailback Questionnaire. Six hundred and fifty-six Client Cards werereturned; of these, 594 skiers provided their full mailing addresses and were therefore sent the Mailback Questionnaire. From the packages (592) that were sent out containing this questionnaire, 12 were returned unopened and 340 were returned completed, thus resulting in a valid response rate
of 58.6%.

Key Findings:
Client Card
• The majority of Client Card respondents (84.9%) were from Canada, one in eight (12.8%) were from the United States and a much smaller proportion (2.3%) were from overseas. The Canadian respondents were primarily from British Columbia (86.7% of all Canadian respondents).

Mailback Survey
• A similar proportion of skiers first started thinking about the destination and then thought about cross-country skiing (32.9%) as those who started by considering a cross-country ski tripand then started thinking about a destination (31.1%).
• Information sources most frequently listed by respondents as helping them plan their trip were also those listed as the three most influential information sources uses: previous visit(s) to the ski area (76.6%/63.5%), advice from friends/relatives/acquaintances (48.5%/42.1%) and past experiences on cross-country ski trips (76.6%/63.5%).
• Almost two-thirds (64.8%) of respondents cited the main motivation for participating in crosscountry skiing on their trip was to have a recreational experience/exercise.
• The largest proportion (80.7%) of nordic skiers cross-country skied on classically (two grooves) groomed trails on the trip they were asked about. Wide, path like trails was the second most popular type of cross-country skiing (44.5%).
• For the majority of skiers, understanding the number and type of trails offered at a club or resort was one of the factors most frequently (88.7%) listed as most important while planning, purchasing. Almost a third (29.6%) rated understanding what other skiers thought of crosscountry day/overnight ski trips (testimonials) taken as not very/not at all important.
• Skiers were most likely to rate the overall value for price paid on services provided at the resort/facility they cross-country skied at (92.4%), followed by the quality of customer service from ticket sellers, food and beverage servers and ski school instructors (84.3%) as somewhat/very important while on their cross-country day/overnight ski trip.
• The majority (80.5%) of respondents indicated that they were very satisfied with their crosscountry ski trip while an additional 11.5% were somewhat satisfied.
• Four out of ten (40.6%) skiers reported that their cross-country ski trip was part of a day trip from their home community while over a quarter (28.3%) said that their cross-country ski trip was part of a short

getaway vacation (less than 4 nights) and 27.4% said that it was part of their multi-day vacation (4 nights or more).
• Over three-quarters (83.8%) of respondents reported that the main purpose of their travel that day, was to participate in cross-country skiing.
• The three most frequently cited types of accommodation used by respondents while in British Columbia were hotel/motels (24.9%), resorts (22.0%) and apartment/cabin/condo/chalet rentals (21.5%).
• The majority of survey respondents (57.7%), regardless of trip type (day trips, short vacations, multi-day vacations), primary regional destination or origin (Canada, USA, Overseas) listed good snow conditions most often as one of characteristics that makes British Columbia unique as a cross-country ski trip destination.
• The longer the trip, the higher the total expenditures reported by respondent. Over half (55.7%) of skiers on a multi-day vacation spent between $1,001.00 and $5,000.00 per trip, while approximately half (50.5%) of respondents on a day trip from their home community spent $50.00 or less.
· The majority of respondents (51.8%) had 21 to 30 years (30.8%) or more than 30 years (21.0%)of cross-country skiing experience.

4.4 Festivals & Events

Tourism British Columbia: Travel Activities and Motivations Survey (2006)

In 2004/2005, 2.8 million Canadian travellers and 4.0 million American travellers participated in festivals & events activities and have visited British Columbia.[5] Festivals & Events Tourists are defined as visitors who have engaged in: carnivals, international film festivals, literary festivals, music festivals, theatre festivals, farmers' markets, exhibitions or fairs, religious festivals, food/drink festivals, ethnic festivals, western theme festivals, gay pride festivals, firework displays, hot air balloon events and comedy festivals.

4.5 Sport tourism

Tourism British Columbia: Tourism Business Essentials – Sports Tourism (2011)/Situation Analysis (2012)

Who are Sports Tourists?

Age – While we often think of adult-oriented sport events, there are a great number of sport participants who are children and youth. Any youth tournament has parents in attendance as they are needed to drive, but they are also there to support their kids. For the parents of many young athletes, following the team becomes a year-round travel and tourism activity. High school sport events such as the BC AAA Basketball Finals, held over the spring break weekend every year, are major tourism events. At the other end of the spectrum, masters sport is among the fastest growing demographic. For example, BC Rugby has tournaments for all ages up to over 70s.

Culture and ethnicity – Sport crosses all cultures. Prince Rupert is the host of an annual First Nations Basketball tournament. A Kabadi tournament will draw great crowds if marketed to the South Asian communities who understand it. And one of the largest soccer tournaments in the Lower Mainland is organized by the Filipino community which draws teams from across North America, every second year.

The nature of the sport itself will also determine the number and characteristics of its sport tourists. The largest events tend to be for mass participation individual events such as marathons, triathlons and cross-country ski loppets; or for team tournaments with lots of teams such as hockey, soccer and softball. Less popular sports, where the contest is individual, have smaller tournaments: fencing, boxing or wrestling, for example. Performance level influences the number and nature of the sport tourists involved. A high performance baseball tournament will have fewer teams involved than minor ball or a recreational softball tournament.

[5] Source: Travel Activities and Motivations Study 2006. Special analysis by Tourism British Columbia.

Value of Sport Tourism

Sport tourism continues to be the fastest growing sector in the global travel and tourism industry. In 2008, the sector was estimated to account for US$600 billion or 10% of the international tourism market, with 12 million trips a year taken for the specific purpose of sport tourism.[6] By 2010, it was estimated that sport tourism contributed an astonishing 14% of overall travel and tourism receipts[7] and that the sector was growing at a rate of approximately 6% a year.[8] At a time when some traditional tourism trends are in decline, sport tourism continues to thrive and is expected to grow exponentially in the next decade.

Canadian figures related to sport tourism are outdated, but reinforce the growing value of sport tourism. According to Statistics Canada, many travel agendas include participation in recreation and competitive sports and, in some cases, sport may be the overriding purpose for travel. Note that the following account only for domestic travel.

1996: Statistics Canada found that domestic travellers embarked on over 4 million overnight person trips involving attendance at sport events. Another 71 million overnight person trips were attributed to Canadians who participated in sport or outdoor activities while on vacation.[9]

1998: The Canadian Tourism Commission's research division estimated sport travel in Canada to be valued at approximately $1.3 billion annually or 4% of the tourism market. The Federal Sub-committee on the Study of *Sport in Canada* estimated that over 200,000 sport events took place each year in Canada and the 1998 Canada Travel Survey indicated that 37% of travellers participated in, or were spectators at, a sport event.[10]

2004: Sport travel generated $2.4 billion in domestic spending, according to the 2004 Canada Travel Survey. The 2004 figures represent an increase of 85% from the 1998 Canada Travel Survey.[11]

2007: Statistics Canada reports that within the context of total tourism receipts, sport tourism receipts ($2.1 billion) account for almost 4% of this total. Quebec, Ontario, Alberta and British Columbia account for $1.7 billion or 82% of sports tourism receipts.[11]

Maximizing the Tourism Benefits/Growing Sport Tourism

There are a number of ways to grow sport tourism and maximize the returns from investment in sport events. These include:

- Hosting more events.
- Improving the yield from existing events, by better coordinating sport events with tourism to maximise visitor volume and length of stay.
- Targeting and supporting events that offer the biggest potential returns in terms of tourism.
- Spreading the benefits of new and existing events to more regions, rather than just the major metropolitan centres.

For further information, please refer to the Sport Tourism guide: www.jti.gov.bc.ca/industryprograms/ .tbe

[6] www.sporttourismexpo.com/sport-tourism
[7] www.breakingtravelnews.com/news/article/vero-to-open-rio-office/
[8] www.businessday.co.za/articles/Content.aspx?id=149285
[9] http://dsp-psd.pwgsc.gc.ca/Collection-R/Statcan/87-003-XIE/0030387-003-XIE.pdf
[10] http://dsp-psd.pwgsc.gc.ca/Collection/C85-6-6-6E.pdf
[11] www.burnettthorneculturaltourism.com/sports_tourism.html
[11] www.pch.gc.ca/pc-ch/org/sectr/inter/econ_impct2007/104-eng.cfm#a2

Appendix B - Competition

Rossland Market Positioning

Extracted from www.tourismrossland.com :

Ski:

Rossland is world famous as the home of Red Mountain Ski Resort with tons of great steeps and deep powder all winter long. Also the home of Big Red Cats- one of the largest cat skiing operations in the world. Additionally, Rossland has arguably the best nordic ski area in western Canada. Come see what all the fuss is about!

Golf:

Set among the towering mountain ranges, shimmering lakes and pristine valleys of the south eastern corner of British Columbia lies a memorable and affordable golf experience waiting to be discovered.

Mountain Biking:

Rossland is known as the "Mountain bike capital of Canada." For more information on Biking in Rossland please go to www.bikerossland.ca. We also have a fantastic skills park located in Rossglen park in lower Rossland.

Nelson Market Positioning

Extracted from www.discovernelson.com:

For the first time visitor to Nelson, there are so many things to see and do that it's no wonder people come back again and again - you can't do it all in one visit. Nelson is surrounded by the rugged Selkirk Mountains and sits on the shores of the West Arm of Kootenay Lake. With some 350 heritage buildings, stunning geography, and a thriving arts community, Nelson has storybook charm combined with cosmopolitan sophistication. Whether gliding through the incredible powder at Whitewater Ski Resort, catching a twenty-five pound rainbow trout on Kootenay Lake, hiking up to Kokanee Glacier, watching the fabulous live performances at The Capitol Theatre, or simply enjoying a leisurely day of shopping along historic Baker Street (to name but a few), the area has attractions for everyone. But don't take our word for it, have a look for yourself.

Revelstoke Market Positioning:

Extracted from www.revelstokemountainresort.com:

Revelstoke Mountain Resort in British Columbia, Canada boasts North America’s greatest vertical at 1,713 metres (5,620 ft.). with 3,121 acres of fall line skiing, high alpine bowls, unlimited tree skiing, phenomenal groomers and luxury ski-in ski-out accommodation, Revelstoke is the perfect place to book your ski & stay vacation package. RMR is also the only resort world-wide to offter lift ticket access, cat skiing, heli skiing and backcountry programs from one village base.

Big White Market Positioning:

Extracted from www.bigwhite.com:

If you're after fantastic snow, don't look any further than Big White. We have the longest season in the Okanagan by staying open until April 14th, 2013. Make sure to join us in taking advantage of our beautiful, crisp Champagne Powder in the beautiful Okanagan.

"It's the snow" is our motto and we live up to our name with an average 750cm (24.5ft) of Okanagan Champagne Powder falling annually. Our bountiful, dry powder is legendary and was awarded "Best Powder" by Ski Canada Magazine in 2008! As a family resort, we also put your safety first and want to keep you safe and happy while you enjoy our slopes. You will see our daily "Slow Zones" that make it easy for beginners and people that want to take it slow and we also have our Safety Tips for using the resort and helping you to watch out for any little hazards Mother Nature may put in your path. We look forward to having you spend time with us out in the Champagne Powder this season!

Sun Peaks Market Positioning

Extracted from www.sunpeaksresort.com:

Sun Peaks ski resort is interior British Columbia's largest destination ski resort. Guests enjoy award-winning downhill skiing, snowboarding and cross country skiing in the winter. Summer activities include hiking, golfing and downhill mountain biking. Sun Peaks ski resort's European-style village is nestled at the base of three mountains; Tod Mountain, Sundance and Mt. Morrisey. The ski resort village offers a wide selection of accommodations, restaurants and shopping boutiques to suit a variety of tastes.

Fernie Market Positioning

Extracted from www.skifernie.com:

Fernie Alpine Resort provides visitors legendary powder, uncrowded trails, mild climate, the best in Après ski fun and much more! **NEW this season, visit Fernie Alpine Resort to Ski the Peak on the new Polar Peak Lift!**

Fernie receives **up to 37 feet of snow in a season**, and attracts a wide range of skiers and riders from around the globe. Delivering over 2500 acres of skiable terrain, 142 named runs, 5 alpine bowls, state of the art snowmaking and grooming equipment, and an exceptional beginner's area, Fernie is a true winter playground for skiers and riders of all levels. Also now featuring the most snow, most ski runs, and biggest vertical in the Rockies! What are you waiting for; this is THE winter to ski Fernie!

Enjoy **ski-in and ski-out convenience** with a variety of accommodations on the mountain. Soak in your own private hot tub in a 5-star mountain chalet just a snowball's throw from the slopes, or watch the sunset over the mountain peaks from the balcony of your private condominium.

Fernie Alpine Resort sits above the legendary town of Fernie – a historical mining community with an unforgettable and eclectic personality. **Dubbed the "Coolest Town in North America" by Rolling Stone Magazine**, visitors to Fernie always feel at home here and choose to come back again and again.

Family - With family friendly slopes, a large variety of on-mountain accommodation, and fun activities for all ages; you will make lasting family memories at Fernie Alpine Resort.

Friends - Great parties, live music, and hot tubs galore - your friends will thank you for bringing them to Fernie Alpine Resort.

Romance - Snuggle up fireside, indulge in a candle-lit gourmet meal, or venture out for a moonlit sleigh ride; a magical, romantic getaway awaits at Fernie Alpine Resort.

Groups - With a variety of full service venues, lodging and conference facilities on-mountain, and special group package rates; Fernie Alpine Resort is the ideal location for your school, corporate retreat, or family gathering.

Weddings - An unforgettable wedding experience awaits at Fernie Alpine Resort with mountain views and unique experiences you and your guests will remember forever!

Kimberley Market Positioning

Extracted from www.skikimberley.com:

There's More to Discover at Kimberley Alpine Resort! A fun and authentic ski resort that is perfect for families and groups, Kimberley Alpine Resort offers everything you are looking for in a ski getaway. Located in the spectacular Purcell Mountains in British Columbia, Kimberley Alpine Resort is known for consistent snowfalls, short lift lines, and an abundance of sunny days. Skiers and riders of all abilities will find fun and excitement with gentle, rolling groomed runs dispersed throughout North America's largest gladed terrain, the Black Forest, where fun and adventure await and powders stashes last for weeks! With a unique Bavarian-themed downtown featuring a variety of restaurants and shops as well a grand assortment of on-mountain, ski-in/ski-out accommodation to choose from including the Trickle Creek Lodge located directly at the North Star Express base; the hardest decision is when to visit!

Family - With family friendly slopes, a large variety of on-mountain accommodation, and fun activities for all ages; you will make lasting family memories at Kimberley Alpine Resort.

Friends - Great parties, live music, and hot tubs galore - your friends will thank you for bringing them to Kimberley Alpine Resort.

Romance - Snuggle up fireside, indulge in a candle-lit gourmet meal, or venture out for a star-gazing snowshoe tour; a magical, romantic getaway awaits at Kimberley Alpine Resort.

Groups - With a variety of full service venues, lodging and conference facilities on-mountain, and special group package rates; Kimberley Alpine Resort is the ideal location for your school, corporate retreat, or family gathering.

Weddings - An unforgettable wedding experience awaits at Kimberley Alpine Resort with mountain views and unique experiences you and your guests will remember forever!

Christina Lake Market Positioning

Extracted from www.christinalake.com:

Discover what generations of families already know: Christina Lake is British Columbia's recreation paradise. The scenery is spectacular, the climate wonderful. Whether you are planning a vacation, wedding, reunion, or looking for a quieter lifestyle, Christina Lake has a lot to offer any time of year.

Drenched in summer sun, Christina Lake is legendary for its warm, clean water, ideal for swimming, boating, and water sports. The surrounding mountains have an abundance of hiking and biking trails, some of BC's finest. The Trans Canada Trail runs through the area, with trestle bridges, tunnels and the spectacular Cascade Gorge. Nearby Kettle River is a great mild kayaking run, while golfers can choose between two excellent courses. In winter, cross country trails are abundant, snowshoeing is very accessible, or you can downhill at nearby Phoenix or Red Mountain.

With its small town charm and scenic setting, our community provides plenty of local amenities, recreation facilities and our new Christina Living Arts Centre. There are so many possibilities, you'll want to move here... after all, that's what we did!

Sandpoint Market Positioning

Extracted from www.sandpoint.com:

Nestled at the base of the Selkirk Mountains in North Idaho's Panhandle region, the community of Sandpoint can be found 60 miles south of the Canadian border and 75 miles northeast of Spokane, Washington. With a population of approximately 7,000 residents, Sandpoint is located in a land of uncompromising natural beauty on the northern shore of Lake Pend Oreille (pronounced Pon-der-ray). A spectacular, glaciated body of water 43 miles long, Pend Oreille is the fifth deepest lake (1,158 feet at its greatest depth) in the United States with 111 miles of shoreline. Its pristine waters are a major factor in the community of Sandpoint's high ranking as a premier tourist destination.

Schweitzer Market Positioning

Extracted from www.schweitzer.com:

Stand at the top and stare at three mountain ranges, Canada and three states. Enjoy a variety of terrain from smooth corduroy groomers to wide open bowls and gladed runs. Then return to the top at hair-flying speed thanks in part to Stella. Stella, as you will soon discover, is Idaho's only six-person, high-speed lift.

By snowcat skiing and snowmobiling ***"the wild west-side"*** of our famously snowy ski resort, we can attest that Selkirk Powder Company, literally ***expands*** the meaning of ***"the Schweitzer Difference"***!

From Selkirk Powder Company's warm and comfortable lodge, situated only yards west of our Great Escape quad, licensed and certified State of Idaho backcountry guides lead skiers, boarders and even non-skiers on all day snowcat skiing or hourly snowmobile adventures in the west, north and south west facing lands directly adjacent to the resort boundary.

Cat skiing: With thousands of acres filled with fresh powder the cat skiing guides will lead you endlessly into every winter aspect you've ever dreamed of; gnarly steep chutes, mellow glades and open fields, glacier-carved, cornice rimmed bowls stacked with powder pillows.