

# Making Research Count: Applying Research to Support Community Tourism Development

---

**Richard Porges**  
**Research Services, Tourism British Columbia**  
**October 6<sup>th</sup>, 2005**



**TOURISM BRITISH COLUMBIA**  
**CANADA**

# Tonight's Agenda

---

- **Tourism and the BC Economy**
  - Value of Tourism
  - Measuring Tourism - The Research Challenge
- **Tourism BC Overview**
  - Mandate, New Programs
  - Research at Tourism BC
- **Community Tourism Foundations**
  - How will it work?
  - Research needs & the research plan
  - Community research projects at Tourism BC
    - Visitor Info Centre Surveys – Prince George
    - Industry tracking surveys
    - Northern Rockies – Alaska Hwy Visitor Survey



**TOURISM BRITISH COLUMBIA**  
CANADA

# Tourism and BC Economy

---



TOURISM BRITISH COLUMBIA  
CANADA

# Defining Tourism

---

- Tourism is not defined as a product – it is defined by the distance the customer is from home!
- Tourism BC:
  - A tourist (or traveler) or is someone who travels 80 kilometres or more one way from home for an overnight stay.
  - Must stay < 1 year, not be paid at destination, etc.
  - In BC – business travel (10% - 15%)
- Different organizations/jurisdictions use different definitions ...
  - Same day visitors?, Ontario – 40 kilometres, etc.



TOURISM BRITISH COLUMBIA  
CANADA

# Measuring Tourism – Research Challenge

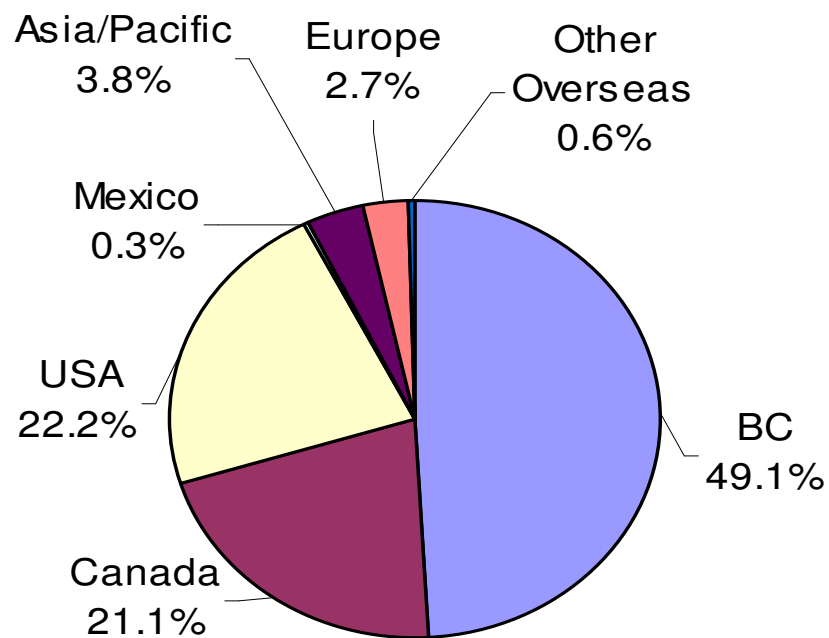
---

- Tourism is not a defined, measurable, set of products
- Tourism cuts across many traditional sectors
- Measuring Tourism
  - Business surveys?
    - Purchasers' status?
  - Consumer surveys?
    - Sampling – how do you find travelers?
    - Recall?
- Limited information – especially at sub-provincial level
  - Communities & businesses must do it themselves



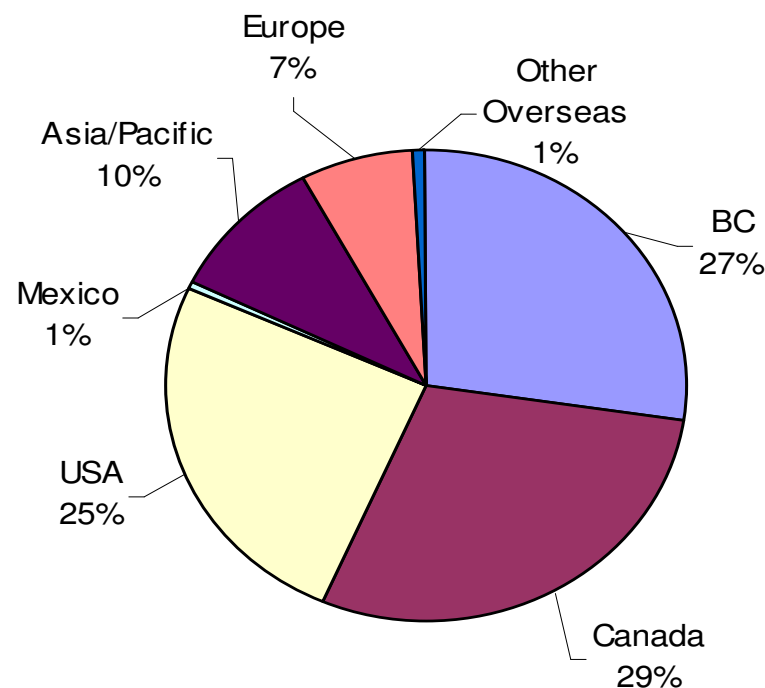
TOURISM BRITISH COLUMBIA  
CANADA

# Overnight Visitor Volume & Revenue (2004)



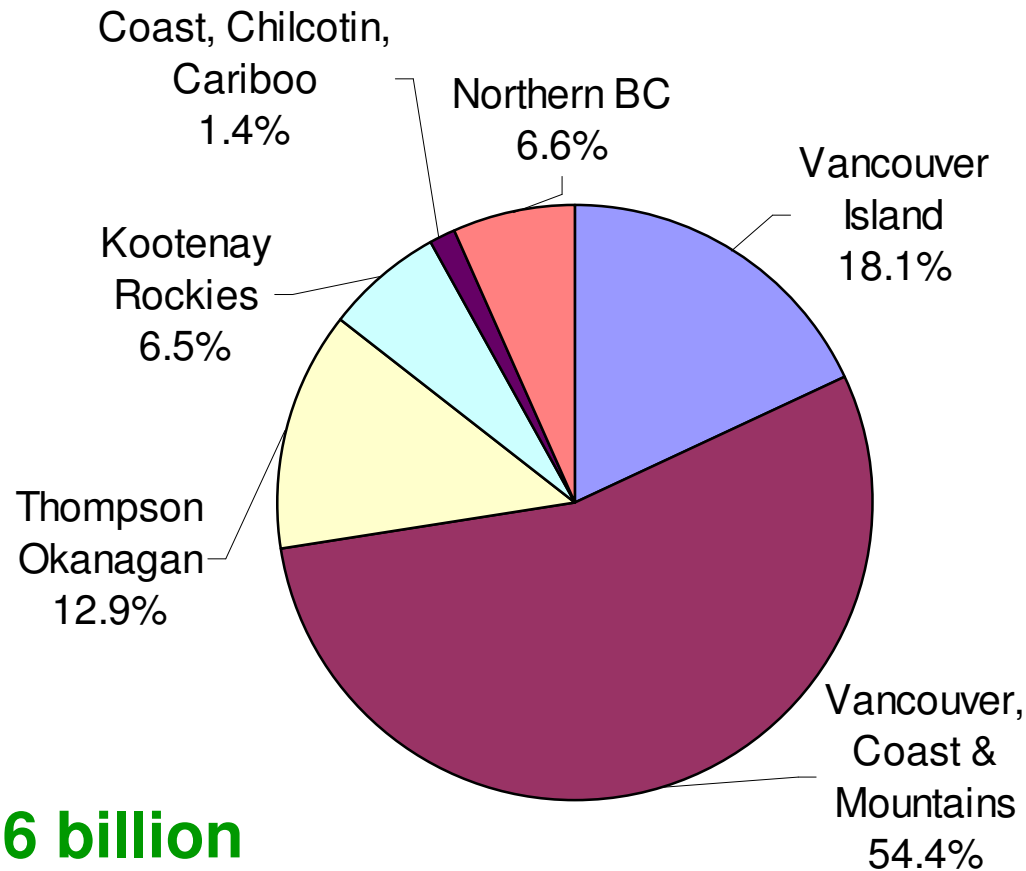
**Visitor Volume = 22.5 million**

**Visitor Revenue = \$ 9.5 billion**



**TOURISM BRITISH COLUMBIA**  
CANADA

# 2004 Room Revenue by Tourism Region

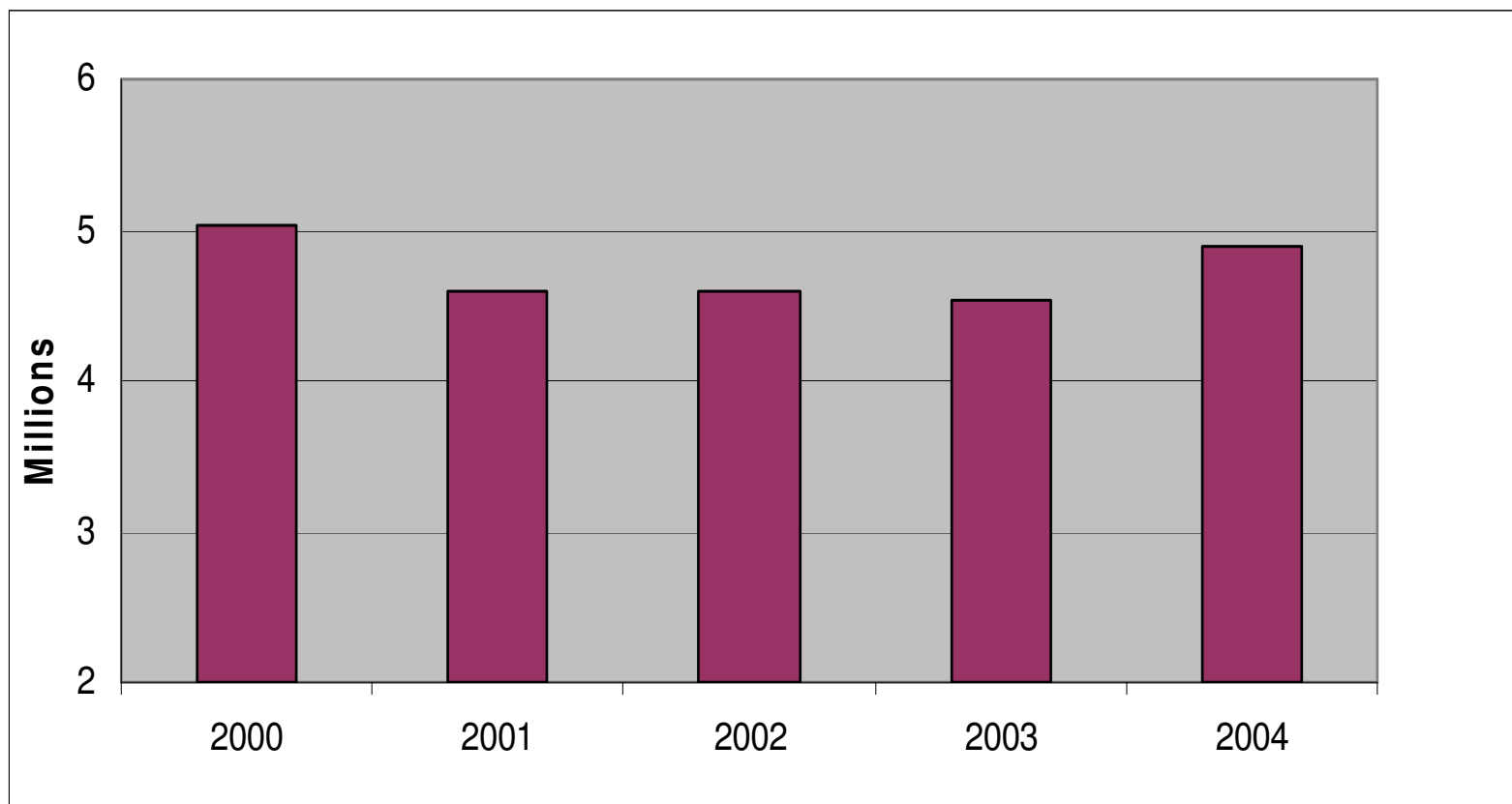


**Total = \$1.6 billion**



TOURISM BRITISH COLUMBIA  
CANADA

# Room Revenue – Williams Lake



Other Indicators: VIC parties, Airport, ?

Jan. - June 2005 + 15.4%



TOURISM BRITISH COLUMBIA  
CANADA



# Value of Tourism

---

## ➤ GDP -

- \$5.0 Billion – 4.4% of provincial GDP

## ➤ Industry reliance on tourism (Source: BC Stats):

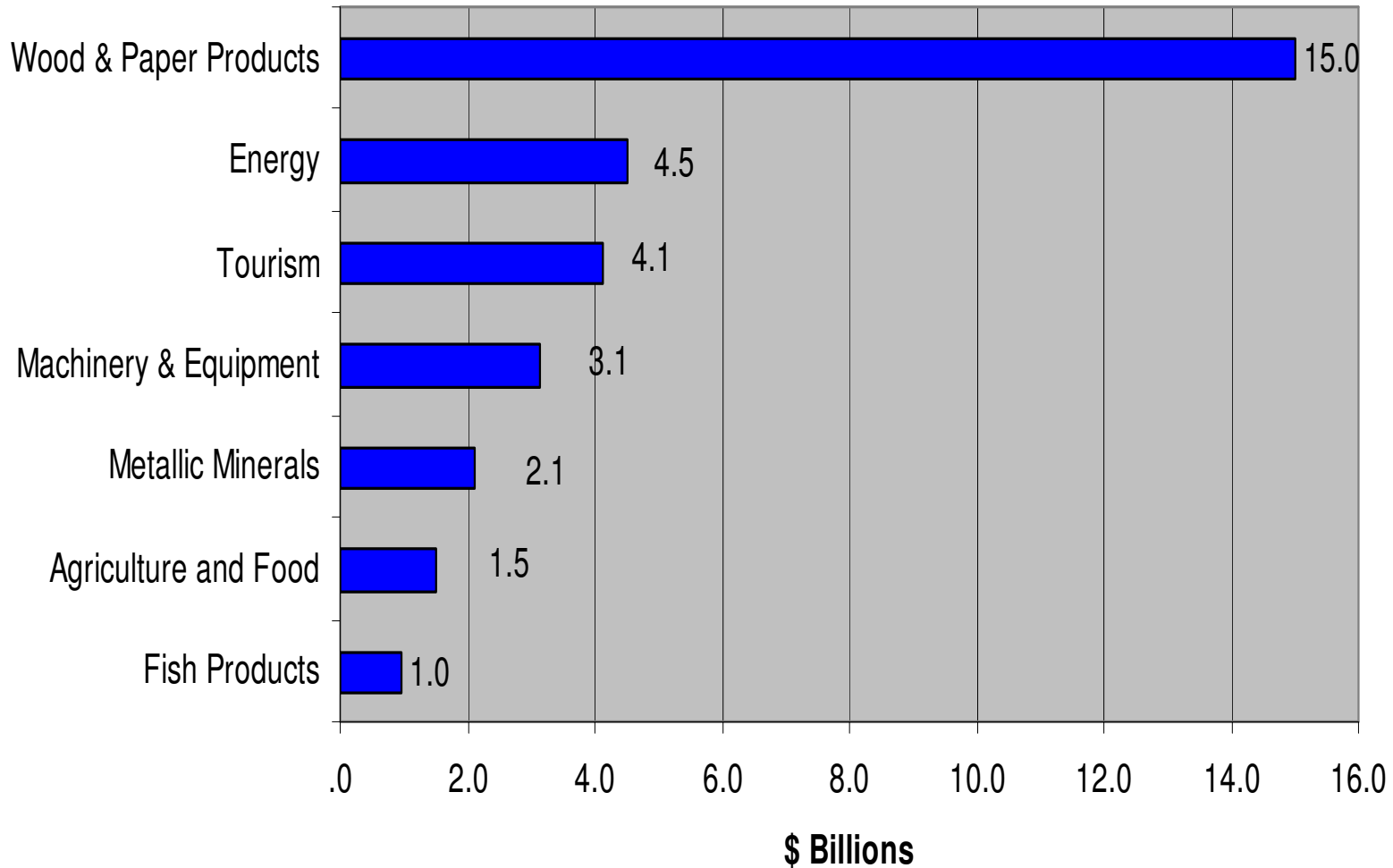
- Accommodation – 90%
- Food & Beverage – 24%
- Golf Courses – 13.4%
- Professional Sports – 5%
- Museums – 60%
- Retail (non-durables) 10%
- Amusement Parks – 10%, etc.



TOURISM BRITISH COLUMBIA  
CANADA

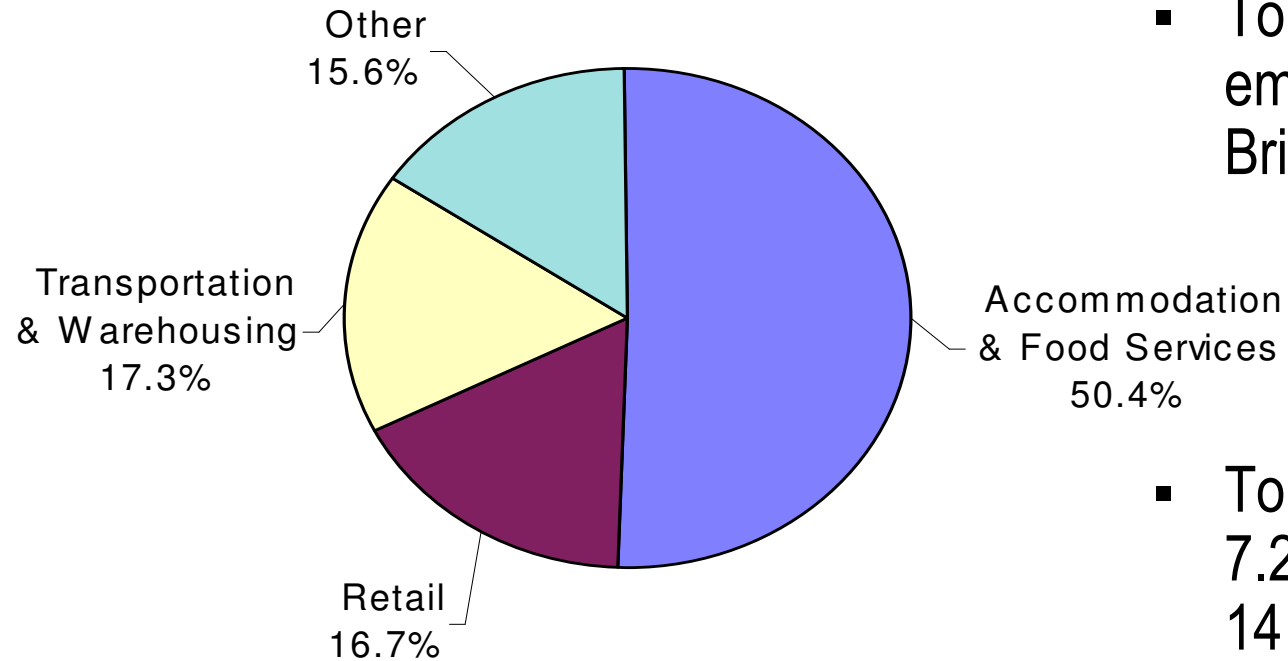
# Value of Tourism - BC Exports (2004)

---



# Tourism Employment (2003)

---



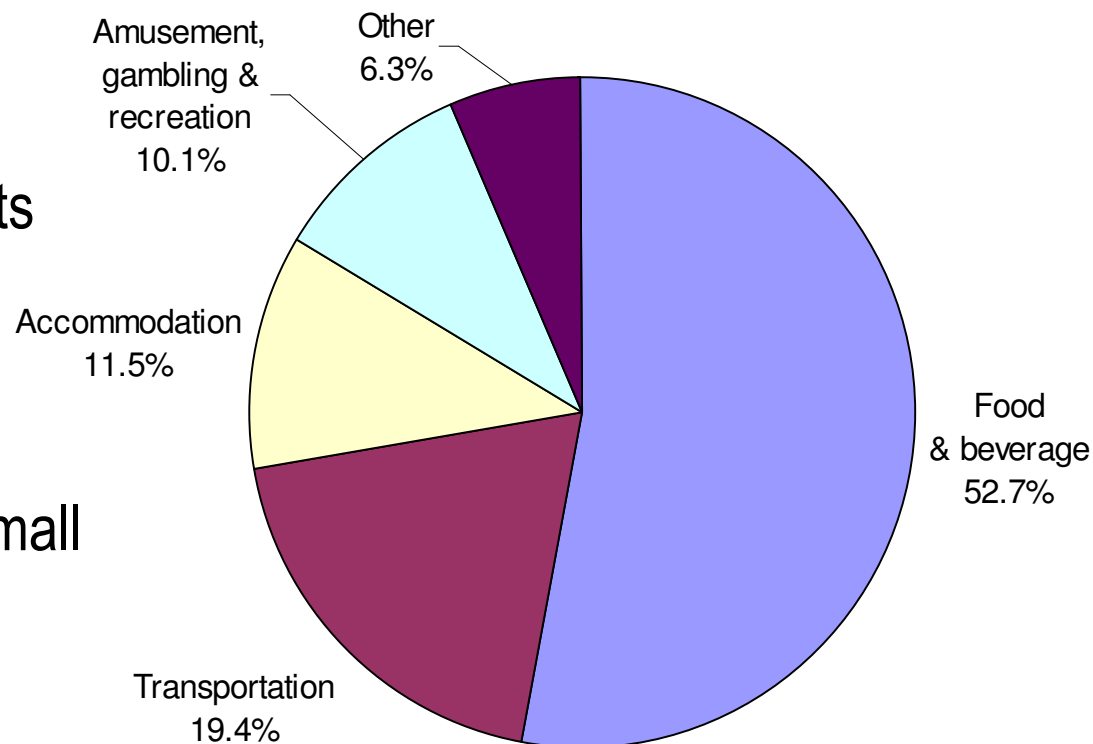
- Tourism industry employed **115,461** British Columbians
- Tourism accounted for 7.2% of jobs in BC (1 in 14 jobs)



TOURISM BRITISH COLUMBIA  
CANADA

# Tourism-Related Business Establishments

- **17,996** tourism-related business establishments in BC (2002)
- More than 11.0% (1 in 9) of BC's business establishments were involved in the tourism industry
- Tourism-related business establishments are mostly small or medium-sized firms when measured by the number of employees



# 2005 Performance YTD

---



TOURISM BRITISH COLUMBIA  
CANADA

## 2005 YTD Tourism Indicators (vs.2004) 1/2

---

Int. Overnight Customs Entries	-0.6%	(Jul)
USA	-2.8%	(Jul)
Asia/Pacific	2.5%	(Jul)
Europe	8.3%	(Jul)
Provincial Room Revenue	4.1%	(Jun)
Provincial Occupancy	3.5%	(Jul)
Provincial Average Daily Room Rate	-1.5%	(Jul)



TOURISM BRITISH COLUMBIA  
CANADA

## 2005 YTD Tourism Indicators (vs.2004) 2/2

---

Vancouver Int. Airport	5.5%	(Jul)
Regional Airports	Most up	(Aug)
BC Ferries	-0.3%	(Aug)
Commercial Restaurant Receipts	10.7%	(Jun)
Visitor Info Centres	3.3%	(Aug)
Coquihalla	2.7%	(Aug)
Cruise (Vancouver)	-0.3%	(Aug)
Conference Centre (Vancouver)	-6.4%	(Aug)
Conference Centre (Victoria)	-19.9%	(Aug)



TOURISM BRITISH COLUMBIA  
CANADA

# 2005 Performance YTD - Summary

---

- Up 3% - 4% Provincially (Fixed Roof)
  - Occupancy/Room Revenue data
  - Other indicators mostly positive
  - US dependent areas down (Whistler), other areas up (to July)
  
- Customs Entries
  - Growth from UK, Australia, Mexico, China, S. Korea
  - US, Taiwan down
  - Germany, Japan?
  
- Domestic Markets
  - BC, Alberta up
  - Regional performance is more closely tied to travel by BC Residents and Albertans than VC&M



TOURISM BRITISH COLUMBIA  
CANADA



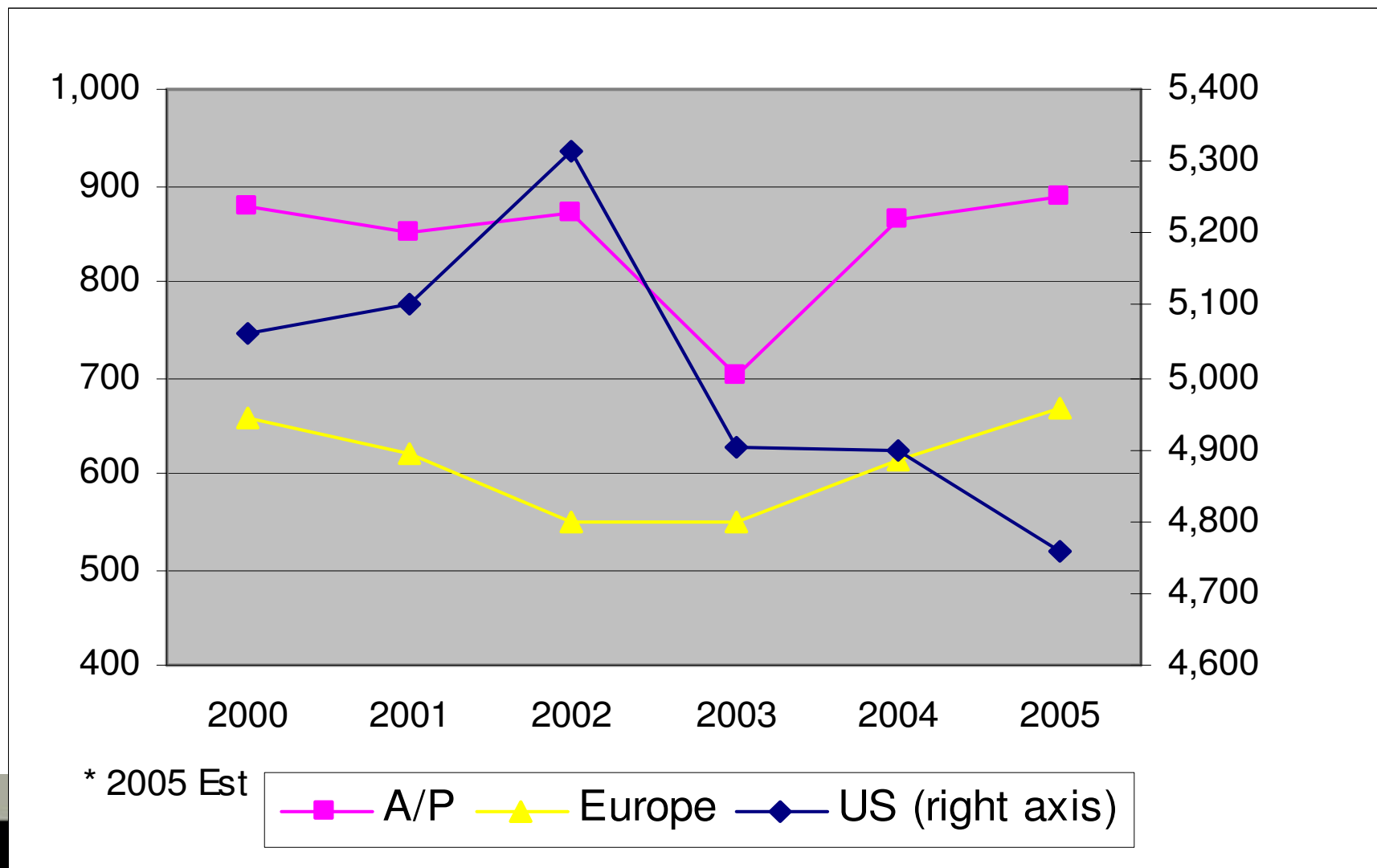
# Tourism Indicators 2000 – 2005

---



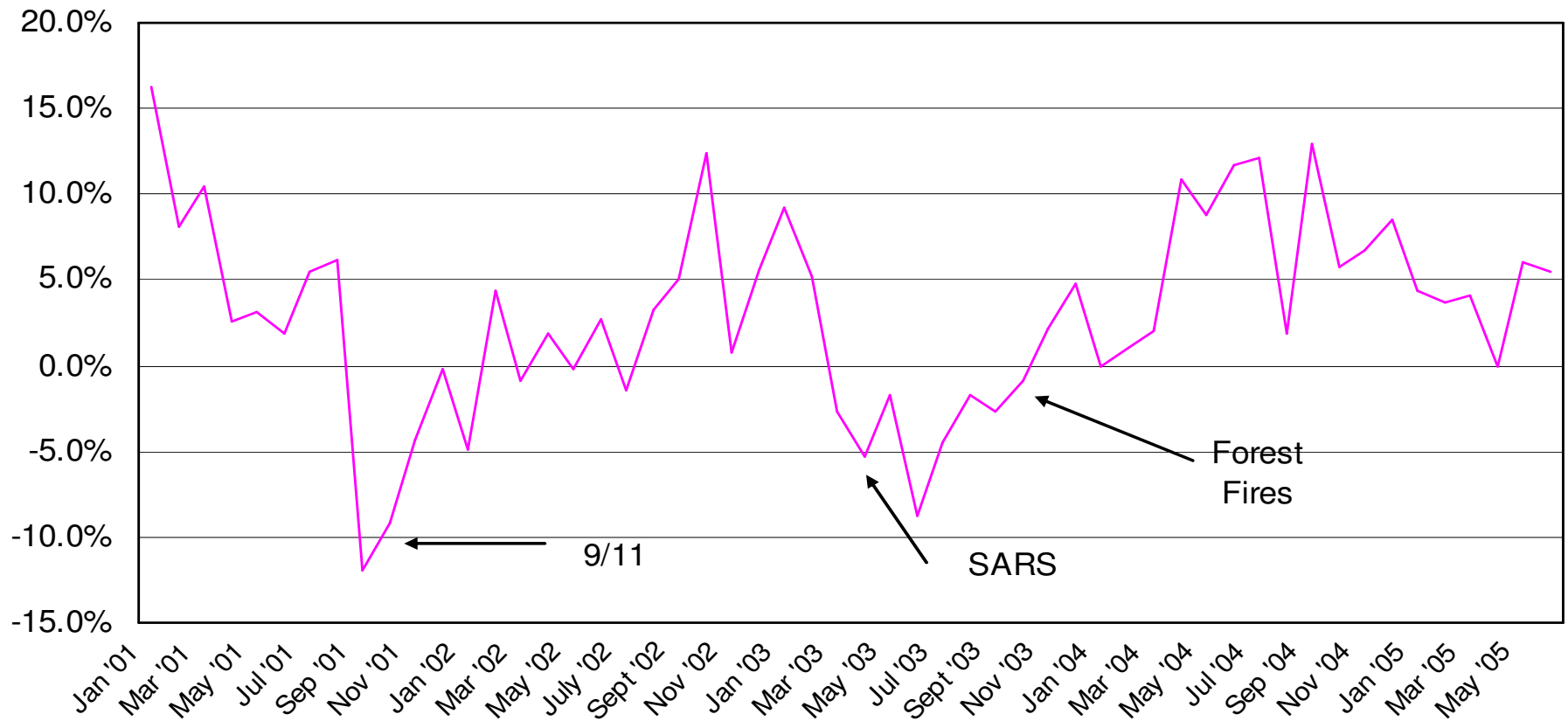
TOURISM BRITISH COLUMBIA  
CANADA

# International Visitors 2000 – 2005\*



# Hotel Room Revenue 2001 - 2005

## Change Over Same Month Previous Year Provincial Hotel Revenue

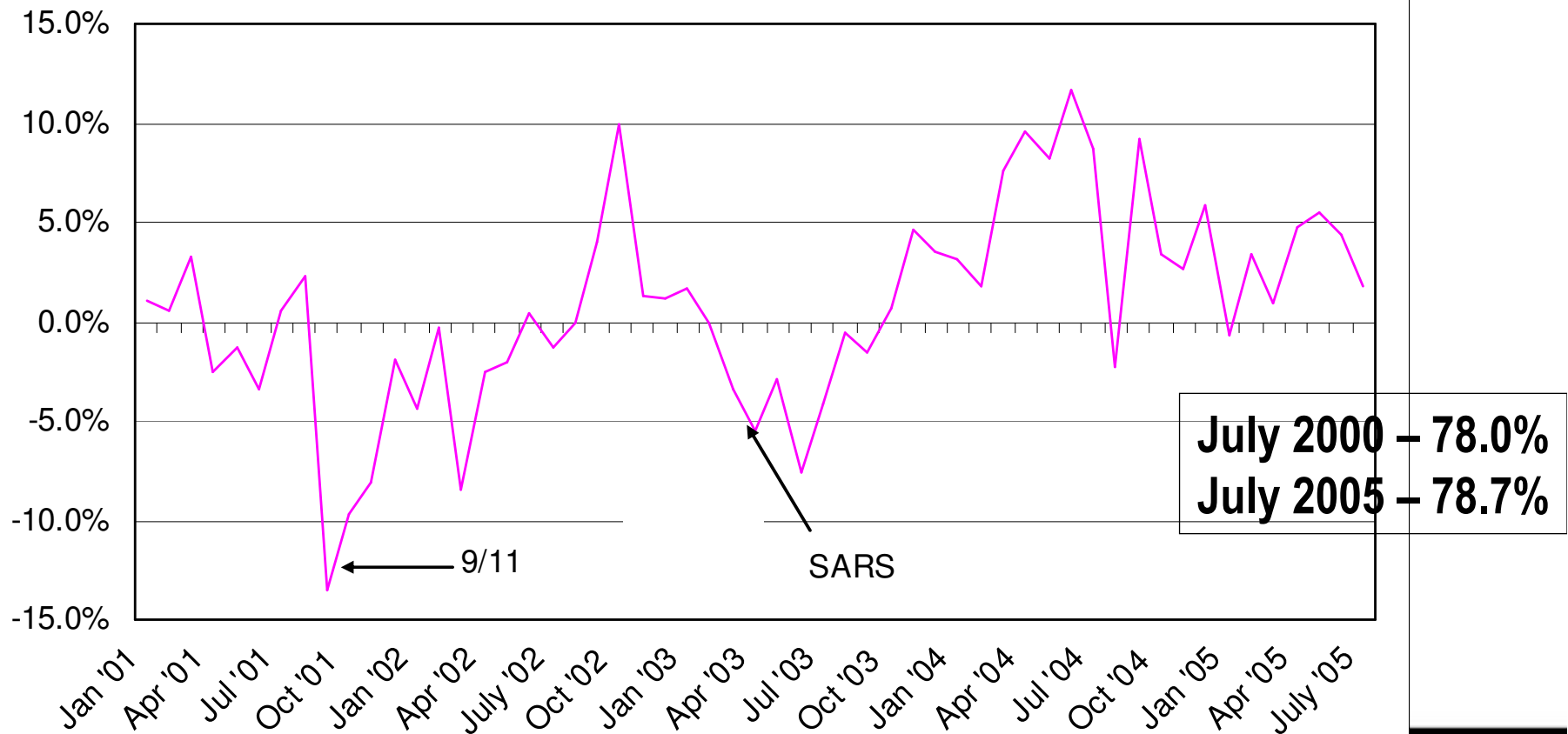


Tourism British Columbia  
Canada

June 2

# Provincial Occupancy 2001 - 2005

## Change Over Same Month Previous Year Provincial Occupancy Rate (PKF)

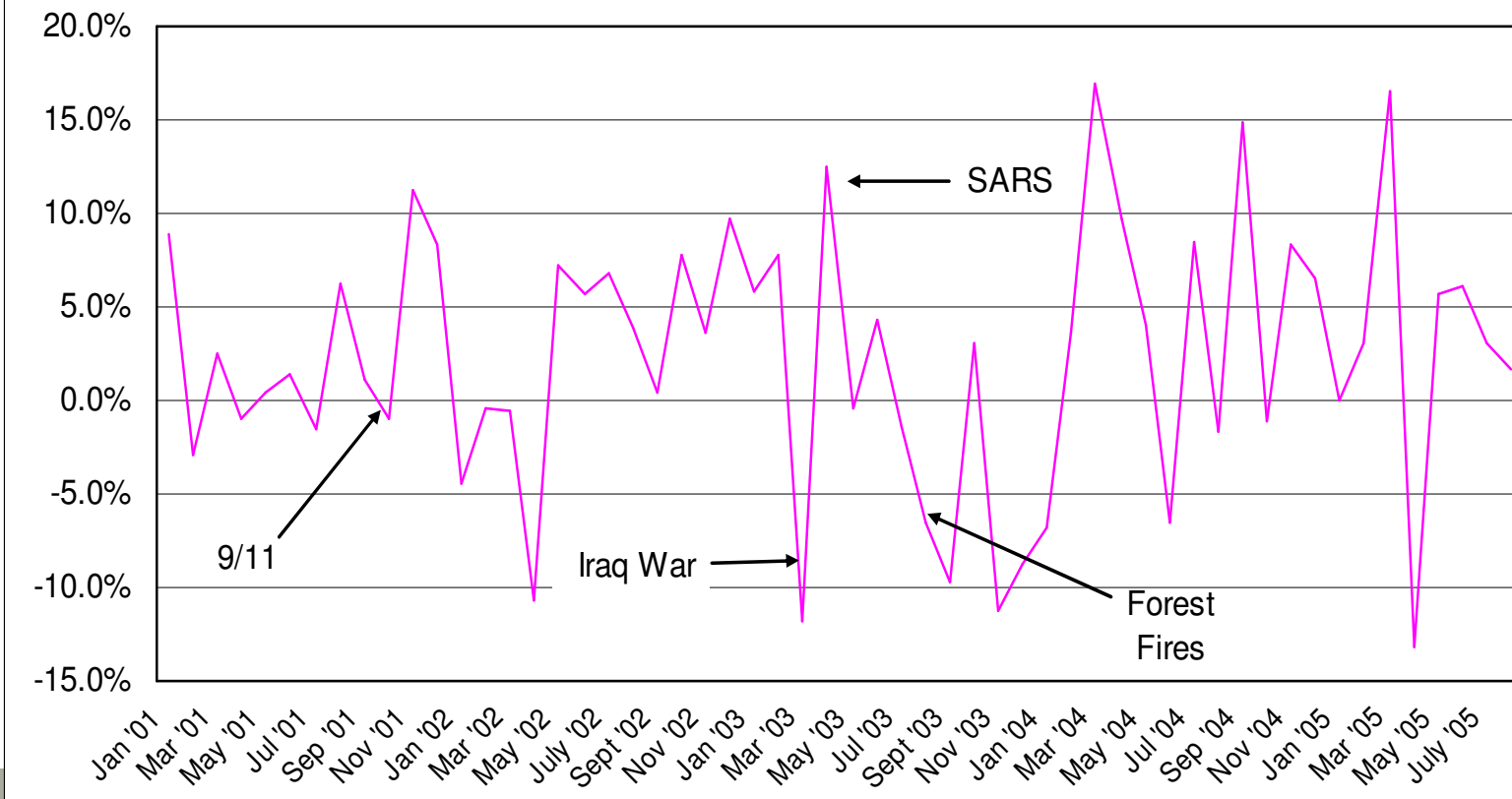


TOURISM BRITISH COLUMBIA  
CANADA

# Coquihalla Traffic 2001 - 2005

Change Over Same Month Previous Year - Paid Passenger Vehicles on the Coquihalla Hwy

July 2000 – 337,900  
July 2005 – 397,600



TOURISM BRITISH COLUMBIA  
CANADA

# About Tourism British Columbia

---



TOURISM BRITISH COLUMBIA  
CANADA

# Tourism British Columbia

---

- An independent Crown Corporation (1997)
- Board of Directors



President/CEO



Staff

- Dedicated funding from hotel tax (1.65% of 8% tax)
- Approximately \$24 million
- Additional voted appropriation \$25 million



TOURISM BRITISH COLUMBIA  
CANADA

# Tourism British Columbia

---

**Purpose** = To promote the growth and development of the tourism industry through innovative marketing programs and industry development initiatives

**Vision** = To be recognized as a world leader in destination management

**Mission** = To exceed customer's expectations by providing leadership and programs that ensure the success of the BC tourism industry, resulting in a quality visitor experience

**Corporate Values** = Integrity, Enthusiasm, Teamwork, Progressive



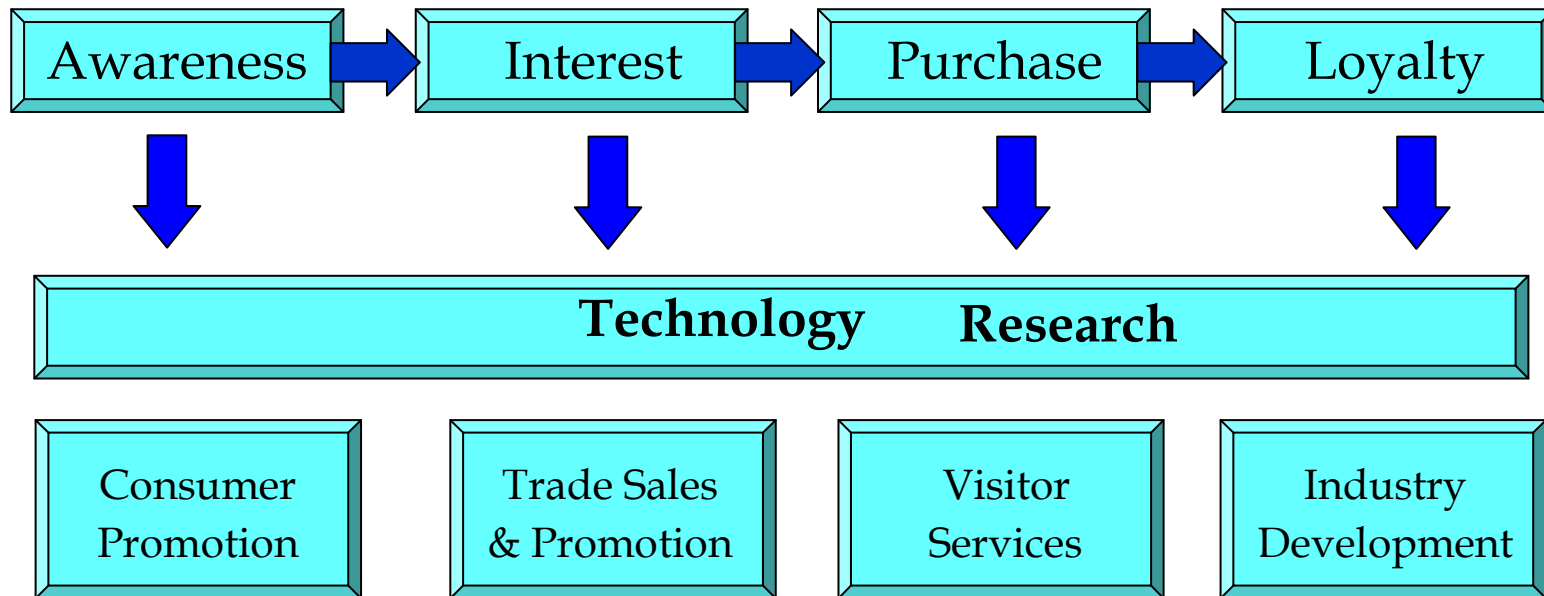
TOURISM BRITISH COLUMBIA  
CANADA



# Tourism BC - Mandate

---

## Consumer Purchase Cycle



TOURISM BRITISH COLUMBIA  
CANADA

# How? - Core Business Functions

---

- **Marketing and Sales Division**
  - Develops and implements marketing programs that are based on consumer research
- **Visitor Services Division**
  - Works visitors and industry directly to improve the quality of the tourism product and enhance the visitor experience
- **Industry Development Division**
  - Assisting new and emerging tourism product businesses, communities and sectors to achieve market readiness
- **Corporate Services and HRD Divisions**
  - Provide internal support for the corporation's activities



TOURISM BRITISH COLUMBIA  
CANADA

# How?

---

- ~130 employees (f/t & p/t)
- 2 main offices, international offices & warehouse
- SNBC (1-800-HelloBC & HelloBC.com)
- Visitor Info Centre Network (110 centres)
- Partner with 6 tourism regions and other destination management organizations
- Partner with other organizations (i.e. CTC)



TOURISM BRITISH COLUMBIA  
CANADA

# Marketing . . .

---

## Germany – Ski Co-op:

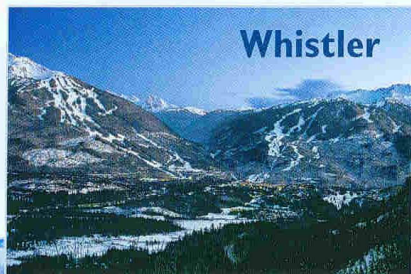
- Canada's West ski initiative
  - Includes Travel Alberta, CTC, Air Canada, Fairmont Hotels and numerous German tour operators
  - 1M guides produced as an insert for various magazines & direct mail
  - Cost \$233,000
  - TBC cost \$50,000



TOURISM BRITISH COLUMBIA  
CANADA

Täglich grüßt der Pulverschnee. Grüßen Sie zurück. Auf

Modern, mondän und weltbekannt. Das Angebot an Luxus-Hotels, Après Ski, Dining, Wining, Wellness und Shopping ist hier mindestens genauso exzellent wie Ski fahren, Snowboarding, Skidooring und Schneeschuhwandern. Im Austragungsort der Olympischen Winterspiele 2010.



## Whistler

200 Pisten, 33 Lifte, längste Abfahrt: 11 km, [www.tourismwhistler.com](http://www.tourismwhistler.com)

**CRD Skicamp Whistler/BC**, 9 Tage inkl. LH Flüge, Transfers, erstklassige Unterbringung im DZ, Frühstück, Skipässe und Skiguides.

p.P./ab  
**1.499 €**

Ein Angebot von **CRD International**



## Big White

118 Pisten, 15 Lifte, längste Abfahrt: 7,2 km, [www.bigwhite.com](http://www.bigwhite.com)  
110 Pisten, 11 Lifte, längste Abfahrt: 8 km, [www.skisilverstar.com](http://www.skisilverstar.com)

**8 Tage Big White oder Silver Star**, vom Champagne Powder verwöhnt, Linienflug, Hotel, Frühstück, Skipass, Transfers und ein Dinner exklusiv bei CANUSA.

p.P./ab  
**1.049 €**

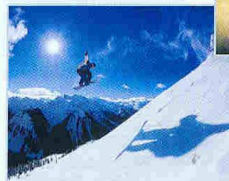
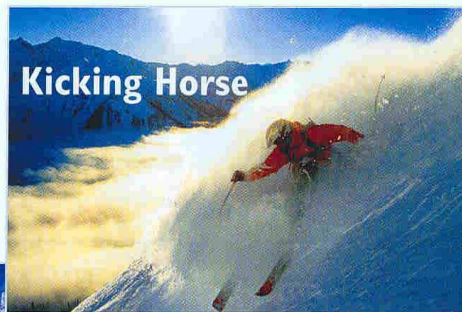
Ein Angebot von **CANUSA TOURISTIK**



Der weiße Riese und der große Klassiker. Zwei ganz besonders Familienfreundliche Resorts mit viel, viel Champagne Powder und viel, viel Platz auf insgesamt über 200 top gepflegten Pisten. Ski-in/Ski-out, Tree Skiing, Après-Ski, kanadische Kultur. Alles hier Alles pur.

Hol' Dir den Kick! Wo sonst nur Adler ihre Kreise ziehen. In Kanadas jüngstem, höchstem und steilstem Resort. In sensationeller Landschaft. Für sensationelle Abfahrten durch tiefen Schnee auf anspruchsvollsten Strecken.

## Kicking Horse



106 Pisten, 5 Lifte, längste Abfahrt: 10 km, [www.kickinghorsesort.com](http://www.kickinghorsesort.com)

**Copper Horse Lodge**, Gemütliche Lodge mit nur 10 Zimmern im Boutique Stil, nur wenige Schritte von der Gondel, inkl. amerikanischem Frühstück

p.P./ab  
**52 €**

Ein Angebot von **Meier's Weltreisen**

unvergesslichen Abfahrten. Durchs endlose Weiß.

## Panorama Mountain Village



Der Name ist Programm. Charmantes Village zwischen wattweißen Gipfeln und steilen Hängen. Super Preis-Leistungs-Verhältnis. Super Landschaft. Ausgangspunkt für viele Heli-Ski Touren. Ganz großes Kino.

120 Pisten, 9 Lifte, längste Abfahrt: 5,5 km, [www.panoramaresort.com](http://www.panoramaresort.com)

**13 Tage SELF-DRIVE**, inkl. Flug, 12 Tage Mietauto, 11 Übernachtungen (4 Nächte Banff, 4 Nächte Golden inkl. HP, 3 Nächte Panorama), 7 Tage Skipass

p.P./ab  
**1.590 €**

Ein Angebot von **Hagen Alpin Tours**



09



**TOURISM BRITISH COLUMBIA**  
CANADA

# UK – Ski Co-op



# SKI CANADA'S WEST...

**A Natural High**

From just **£485** per person with Crystal Ski

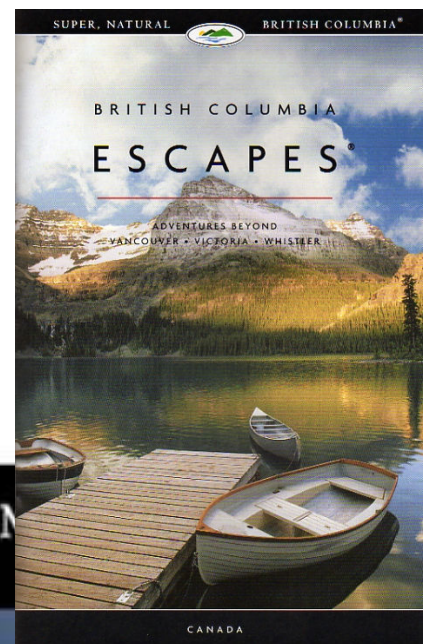
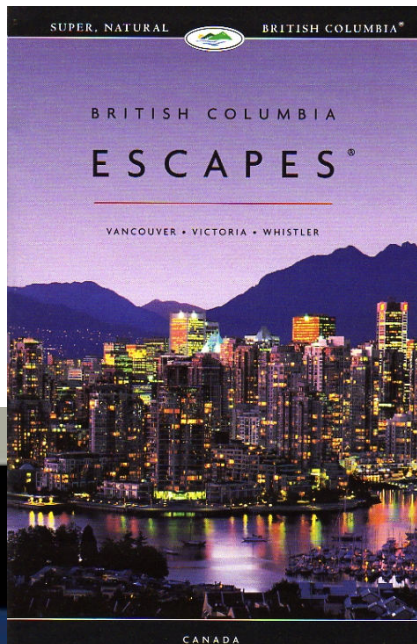
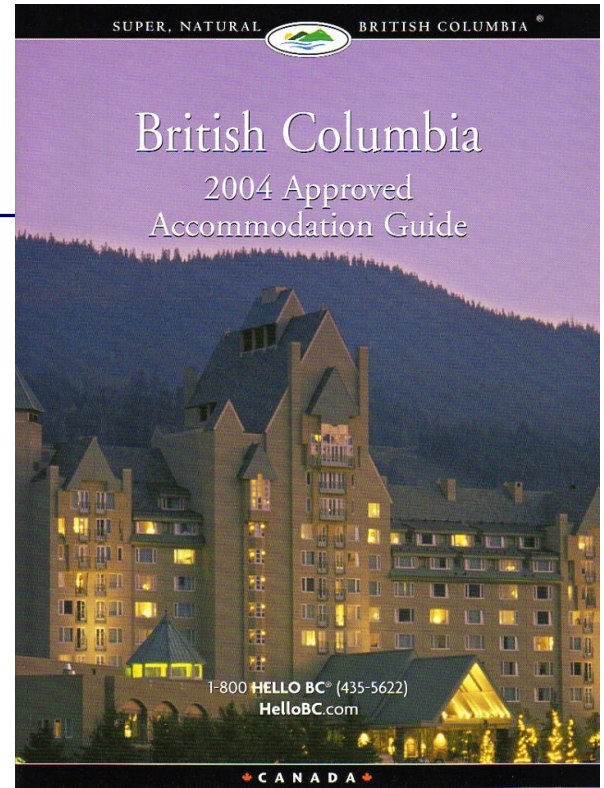
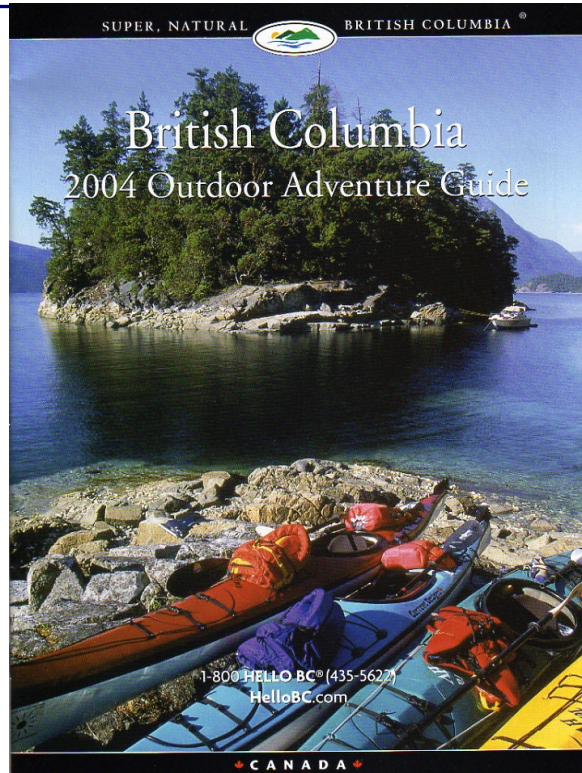
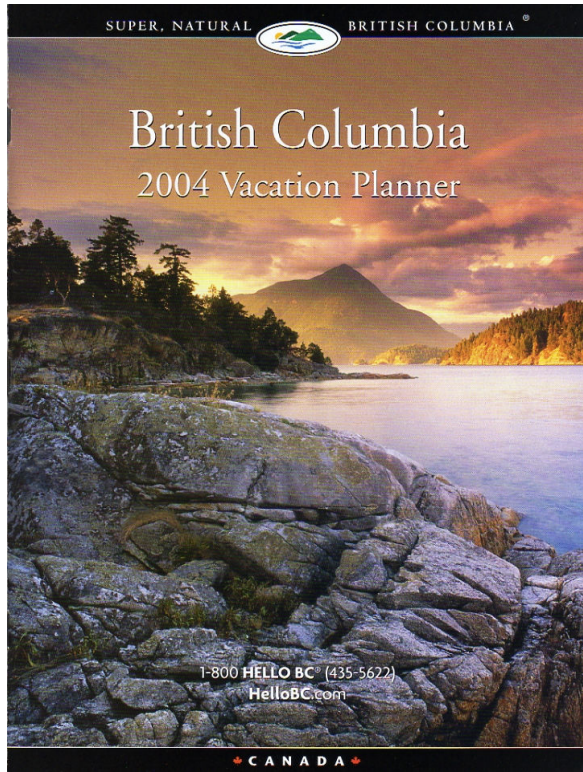
To book visit **crystalski.co.uk/canadawest** or call **0870 403 3302**

Crystal 

● Big White ● Fernie ● Kicking Horse ● Kimberley ● Lake Louise ● Silver Star  
● Ski Banff ● Norquay ● Ski Jasper ● Sunshine Village ● Whistler



TOURISM BRITISH COLUMBIA  
CANADA

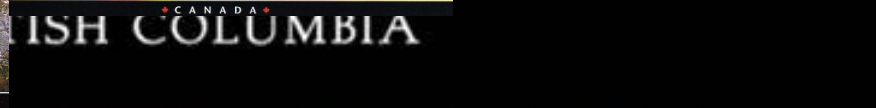
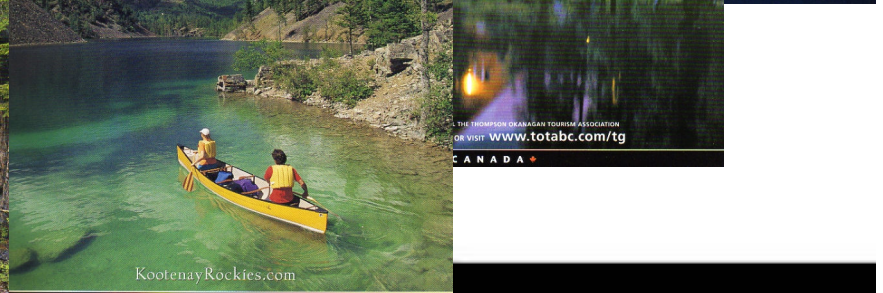
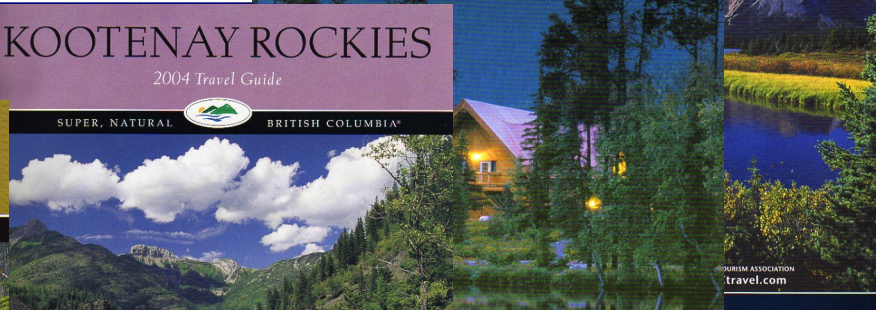
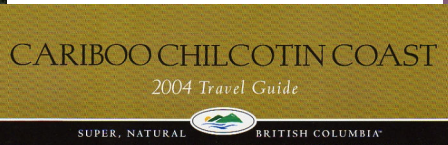
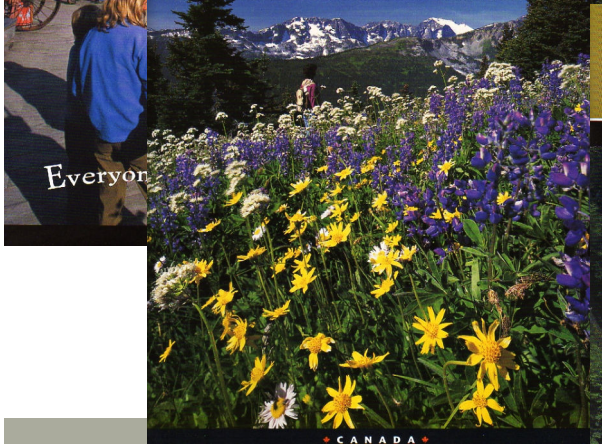
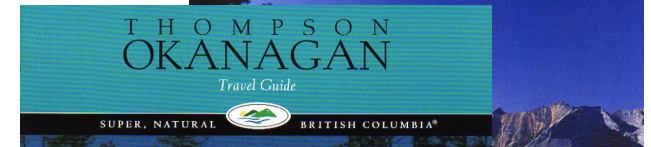
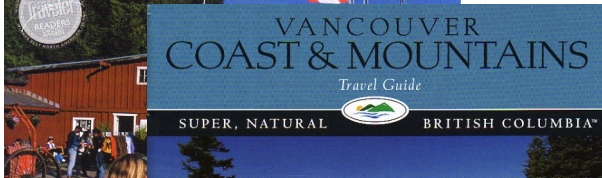
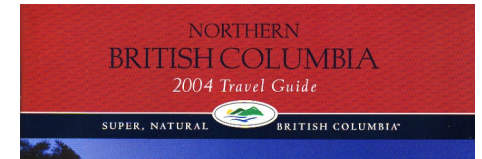
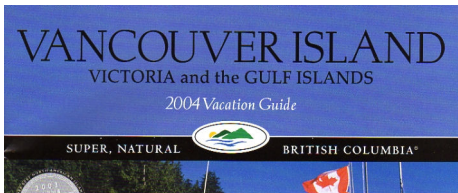
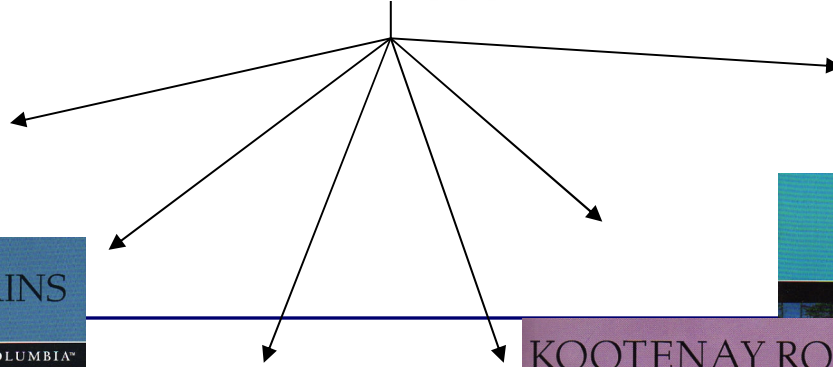


TOURISM BRITISH COLUMBIA  
CANADA



# SUPER, NATURAL BRITISH COLUMBIA

CANADA<sup>®</sup>





# Research Services - Mandate

---

## ➤ Internal

- Support information based management at Tourism BC  
– respond to needs of internal business units

## ➤ External

- “The corporation is responsible for. . . . collecting, evaluating and disseminating information on tourism markets, trends, employment, programs and activities.”

**Tourism BC Act (1997)**



**TOURISM BRITISH COLUMBIA**  
CANADA

# Research Services – Our Team

---



*Angela Xu, Krista Morten, Richard Porges, & Carol Jenkins (missing: Valerie Sheppard)*



TOURISM BRITISH COLUMBIA  
CANADA

# Key Activities

---

- **Dissemination of information through research publications**
- **Performance Tracking**
  - On-going tracking surveys
- **Major partnership projects**
- **Information request fulfillment**
  - Web, email, phone
- **Research support for internal clients**
  - Market intelligence, program evaluation or strategic intelligence
- **Provincial and national research committees**
  - BC DMO Tourism Research Group, CTC Research Committee



**TOURISM BRITISH COLUMBIA**  
CANADA

# Key Publications

- **Tourism Indicators** - customs entries, room revenue, restaurant receipts, occupancy rates, ADR & stats from VICs, airports, ferries & conference centres
- **Value of Tourism** - tourism GDP, tourism exports, tourism employment, business establishments, accommodation room revenue & provincial gov't revenue
- **Tourism Performance & Outlook** - estimates of total visitor volume and revenue by market for British Columbia



TOURISM BRITISH COLUMBIA  
CANADA

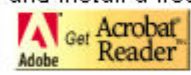


- Home Page
- Media
- Research**
  - Tourism Statistics**
  - Revenue and Volume
  - Value of Tourism
  - Key Market Information
  - Special Reports
  - BC Visitor Study
  - Overseas Research
  - Impact of Global Events
- Working at TBC
- About Us

## Research

Tourism BC conducts research on various aspects of the tourism industry, providing industry partners with information to enhance the effectiveness of future marketing and development projects. The information provided on this page will be updated on a regular basis, and should prove helpful in examining tourism patterns.

The following publications are available in PDF format. If you do not have Adobe Acrobat Reader installed, click on the link to download and install a free version.



- ### Recent Additions
- Mar 30, 2004 **Projections**
    - [2004 Tourism Outlook](#)
  - Mar 22, 2004 **Backgrounders**
    - [Backgrounder #38 \(January\)](#)
  - Mar 17, 2004 **Tourism Indicators**
    - [Data Tables Supplement \(March\)](#)
  - Mar 4, 2004 **Tourism Performance**
    - [2003 Tourism Performance](#)
  - Feb 24, 2004 **Tourism Indicators**
    - [Indicators #37](#)

[www.tourismbc.com/research](http://www.tourismbc.com/research)

# Partnership Projects

---

- **BC Aboriginal Tourism Strategy**

Objective: to develop a research-driven strategic plan for aboriginal cultural tourism in British Columbia

- **Okanagan Cultural Corridor Project (OCCP)**

Objective: to evaluate the OCCP marketing initiative and to develop understanding about visitors' interest in cultural activities

- **Commercial Nature-based Tourism**

Objective: to measure the economic impact of commercial wilderness tourism operations and to build a system to track on-going sector performance



TOURISM BRITISH COLUMBIA  
CANADA

# Partnership Projects

---

- **Tourism Partners Evaluation Program**

Objective: To integrate the inquiry/fulfillment databases from the regions and use this information for coordinated media conversion studies and program evaluation

- **Value of the Visitor Info Centre Project**

Objective: To measure the economic impact of Visitor Info Centres throughout the province

- **Northern Rockies Alaska Highway Visitor Research**

Objective: To provide data on the profiles and volume of visitors along the highway and to provide the research needed to support marketing plan design and product development in north eastern British Columbia



TOURISM BRITISH COLUMBIA  
CANADA

# Visitor Info Centre Research

---



TOURISM BRITISH COLUMBIA  
CANADA



# Value of the Visitor Info Centre (VIC)

---

- > 110 VICs in BC
- 1.66 M visitor parties in 2004
- VICs must meet standard operating criteria established by Tourism BC
- Most VICs operated by local chamber of commerce or tourism association
- 4 operated by Tourism BC as provincial centres (key border crossing and important highway intersections)



TOURISM BRITISH COLUMBIA  
CANADA

## Value of the VIC - Background

- Provide communities with an opportunity to influence the activities and satisfaction of travelers
  - Increasing length of stay and return trip visits
- Declines in funding have created a need for VICs to demonstrate their economic value



TOURISM BRITISH COLUMBIA  
CANADA

# Value of the VIC - Purpose

---

- To gain information about:
  - Travelers at a community level
  - Users of the VIC
  - VIC impacts on travel patterns (economic impact)
- To apply a consistent method of collecting data and calculating economic impact at VICs across the province
- To provide an affordable way for VICs to collect detailed information about travelers in their communities



# Value of the VIC-Study Design

- Survey Objectives:
  - To profile travelers who use the VIC in terms of trip and traveler characteristics
  - To measure the influence the VIC has on the decision making process of travelers in BC in terms of length of stay, expenditures, selection of alternate activities, attractions or destinations
- Visitor survey methodology used:
  - Two phases and two locations



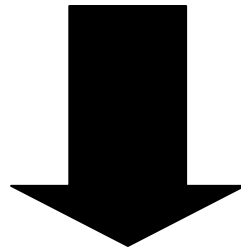
TOURISM BRITISH COLUMBIA  
CANADA

# Value of the VIC-Study Design

---

Each survey has two phases:

**1. Intercept Interviews**



**2. Mailback Surveys**



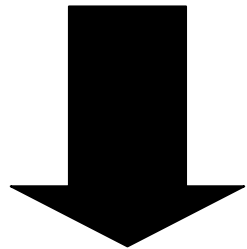
**TOURISM BRITISH COLUMBIA**  
CANADA

# Value of the VIC-Methods (Analysis)

---

**Mailback Survey** – responses could vary due to 3 factors

**1. Intercept Interviews**



**2. Mailback Surveys**

**1. Respondents that agree to participate in the mailback survey could differ from those who don't agree to participate (AGREE)**

**2. Respondents that return the mailback survey could differ from those who don't return the mailback survey (RESPOND)**

**3. Actual responses could differ between similar questions asked in the interview vs. the mailback survey (RESPONSE)**



**TOURISM BRITISH COLUMBIA**  
CANADA

# Value of the VIC-Study Design

---

Each survey has two locations:

**1. Visitor Info Centre**

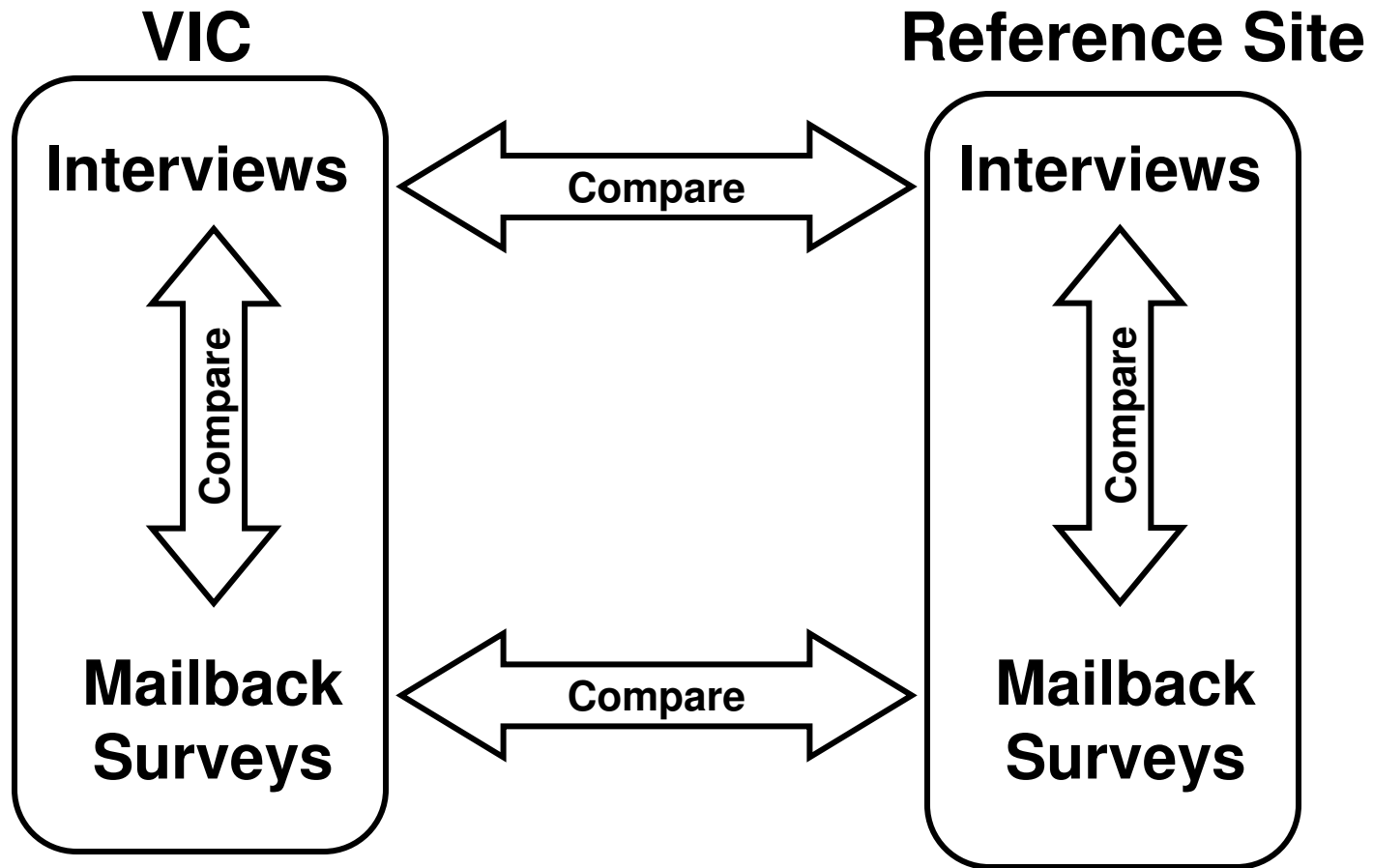
**2. Reference Site**



**TOURISM BRITISH COLUMBIA**  
CANADA

# VIC Research - Study Design

---





# Value of the VIC-Methods (Data Collection)

---

## Intercept Interviews

- Systematic random selection of sample days; peak season
- Collect data during their trip
  - Trip and traveler characteristics
  - Flexibility in activities and time in study area and BC
  - Perception of VIC impact on their trip (only at VIC)
- Use of Palm Pilots provides:
  - Survey logic controls
  - Automatic recording of refusals/incomplete interviews
  - Daily data download, no data entry



TOURISM BRITISH COLUMBIA  
CANADA

# Value of the VIC-Methods (Data Collection)

---

## Mailback Survey

- Interview respondents are asked to participate in mailback survey
- Collect perceptions after their trip
  - Trip and traveler characteristics
  - Flexibility in activities, time in study area and BC
  - VIC impacts on traveler behavior
  - Unique characteristics and positive and negative images of study area
- Survey package includes survey booklet and free copy of British Columbia magazine and a business reply envelope (completed surveys entered in draw for digital camera)



TOURISM BRITISH COLUMBIA  
CANADA

# Value of the VIC-Response Rates

	VIC (n)	RS (n)	Resp. Rate (VIC)	Resp. Rate (RS)
<b>Coquihalla</b>	330	564*	66%	66%
<b>Hope</b>	206	164	65%	72%
<b>QCI</b>	148	869	68%	73%
<b>Kelowna</b>	326	414	52%	59%
<b>Penticton</b>	287	281	55%	53%
<b>Grand Forks</b>	160	-	64%	-
<b>Mt. Robson</b>	275	194	57%	54%
<b>Prince George</b>	283	-	71%	-
<b>Salt Spring Island</b>	106	160	-	-



**TOURISM BRITISH COLUMBIA**  
CANADA

# Key Findings - Traveler Characteristics

---

- High variability in traveler origin between studies
- Traveler origin varied between the reference site and the VIC for 6 of 9 studies
  - In most cases there were more BC residents at the reference site than at the VIC
- In two studies, age and education varied between the reference site and the VIC
- Income did not vary between the reference site and the VIC in any of the studies



# Key Findings - Trip Characteristics

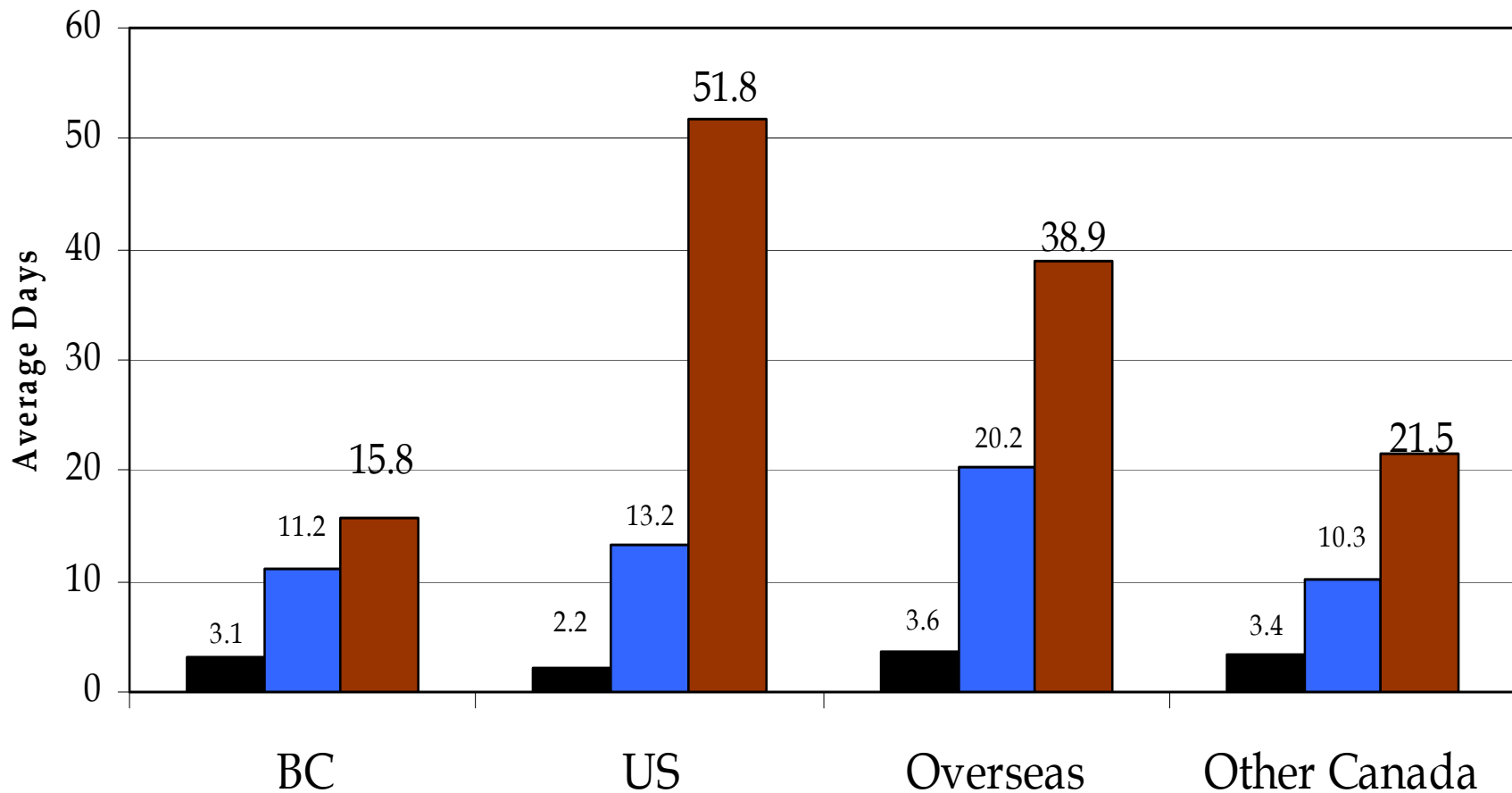
---

- Average daily expenditures ranged between \$93 to \$192 per party
- The Internet was the top trip planning information source for all 10 studies
- Travelers in most studies were more flexible in terms of activities than in time (both in the region & in BC)
- In almost all studies, the majority of travelers spoke with a travel counsellor
- Between 91% and 100% of travelers replied the VIC met or exceeded their expectations



TOURISM BRITISH COLUMBIA  
CANADA

# Trip Length – Prince George VIC

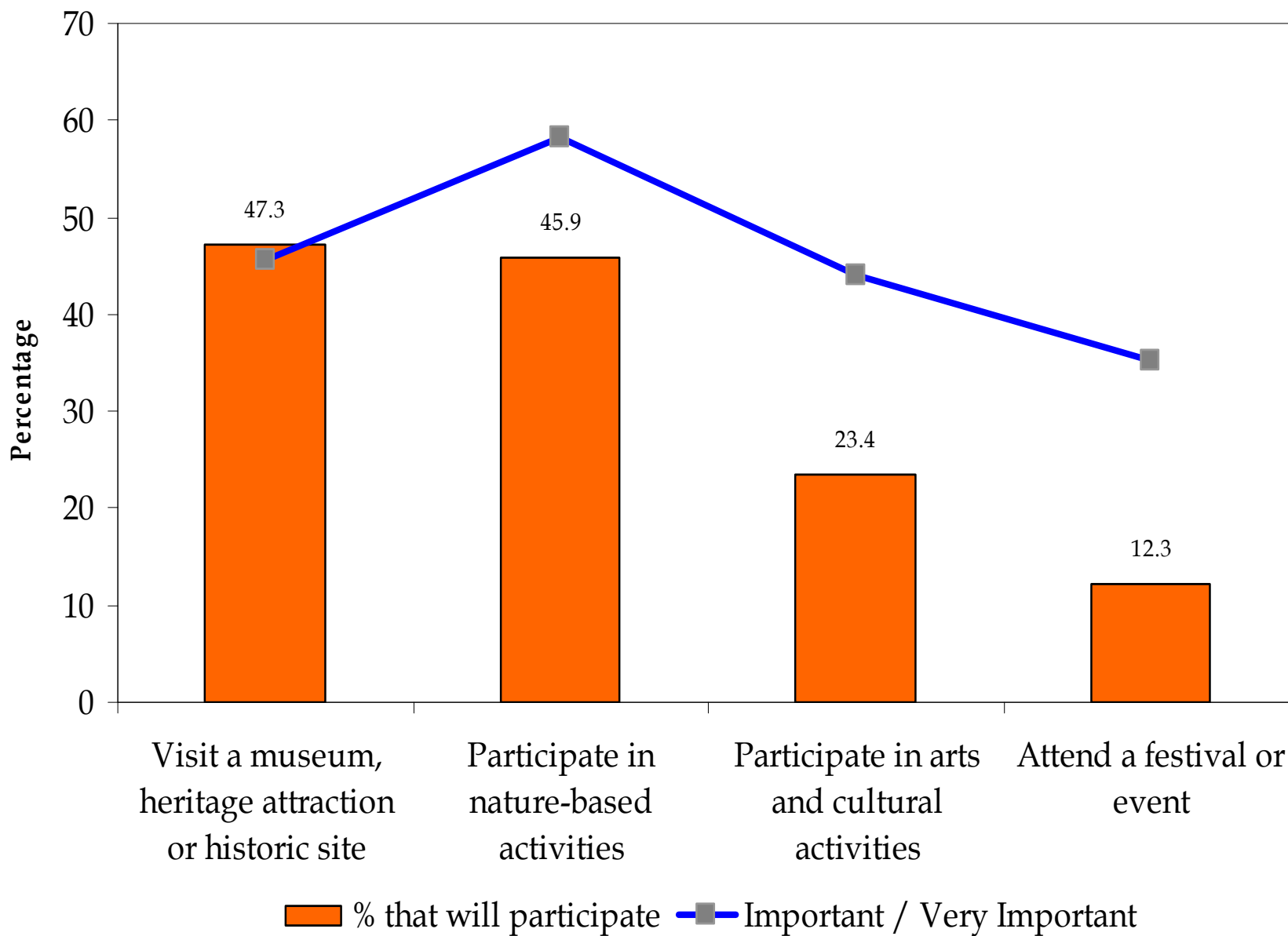


■ Days in Prince George   ■ Days in BC   ■ Days Away From Home



TOURISM BRITISH COLUMBIA  
CANADA

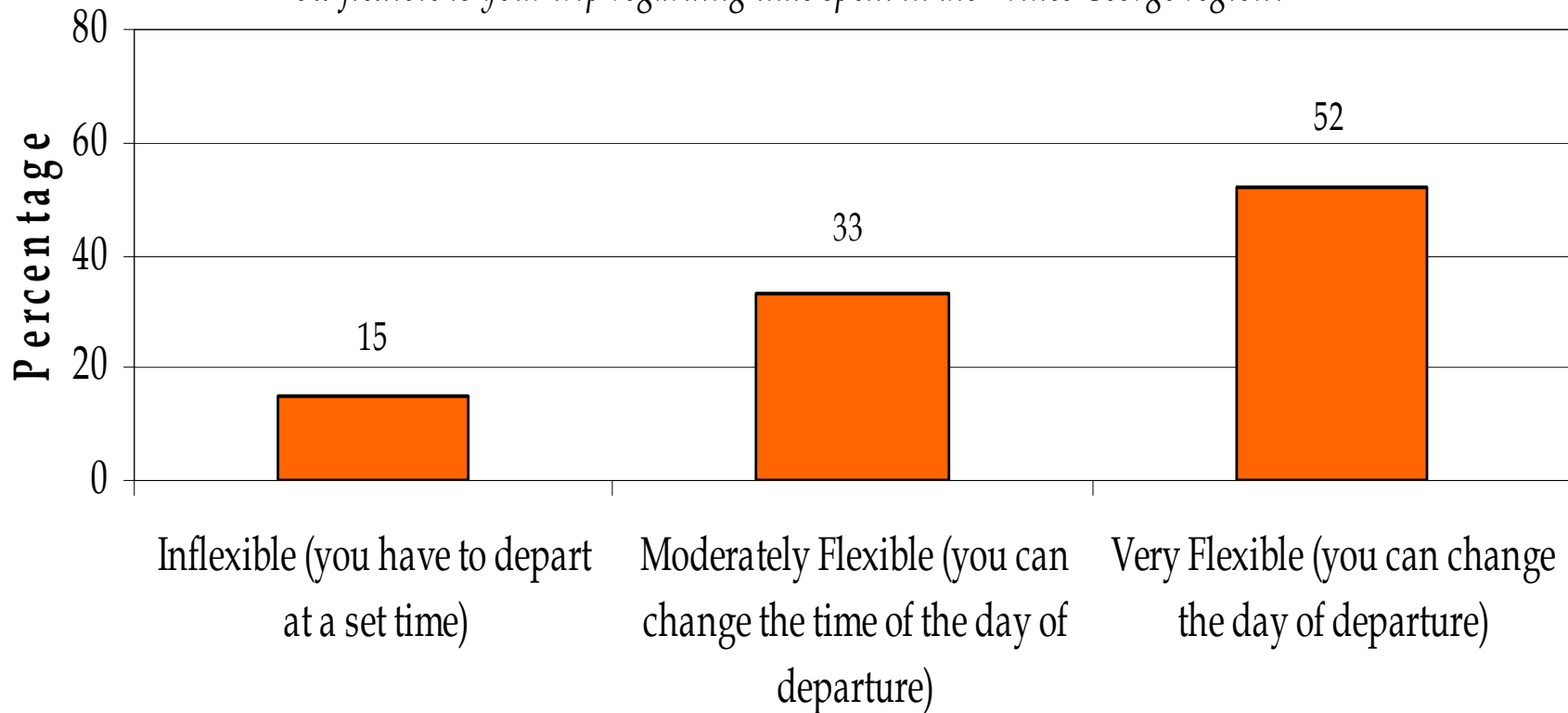
# Participation & Importance – Prince George



# Trip Flexibility – Prince George

## Trip Flexibility Regarding Time in Prince George

*How flexible is your trip regarding time spent in the Prince George region?*



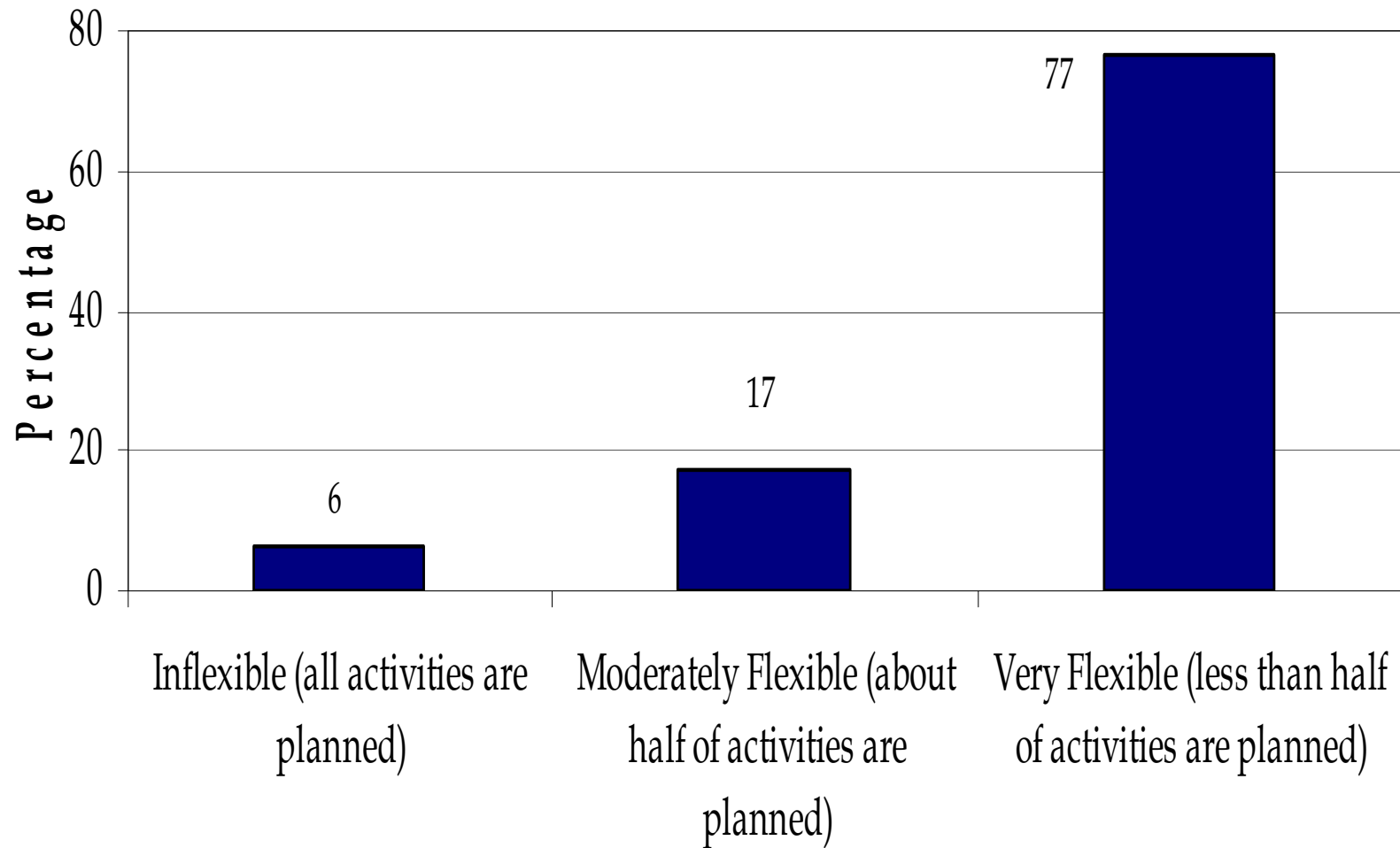
TOURISM BRITISH COLUMBIA  
CANADA



# Trip Flexibility – Prince George

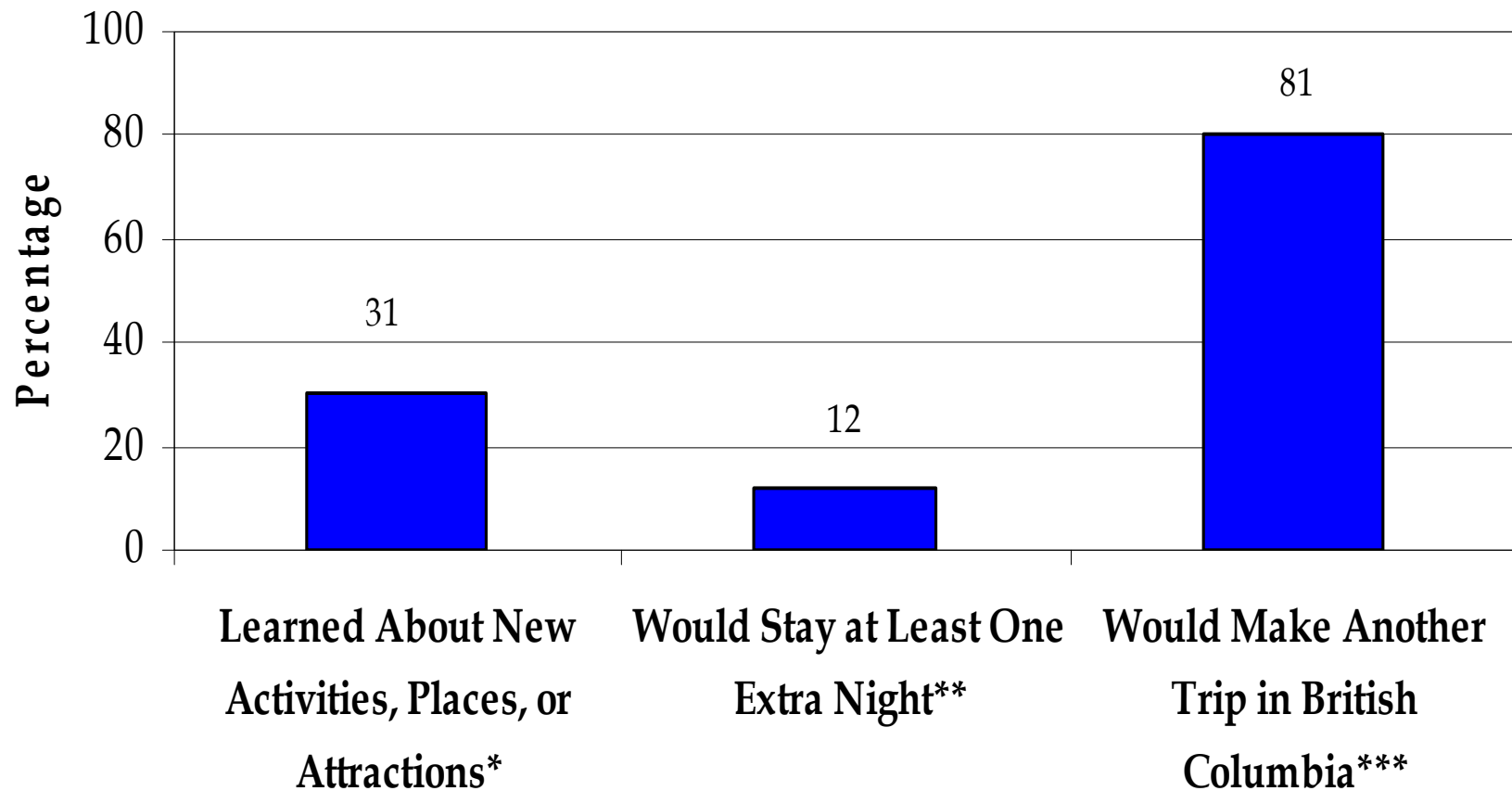
## Trip Flexibility Regarding Activities in Prince George

*How flexible is your trip regarding activities while in the Prince George region?*



# Influence of VIC – Prince George

Prince George VIC Impacts on Traveler Behaviour

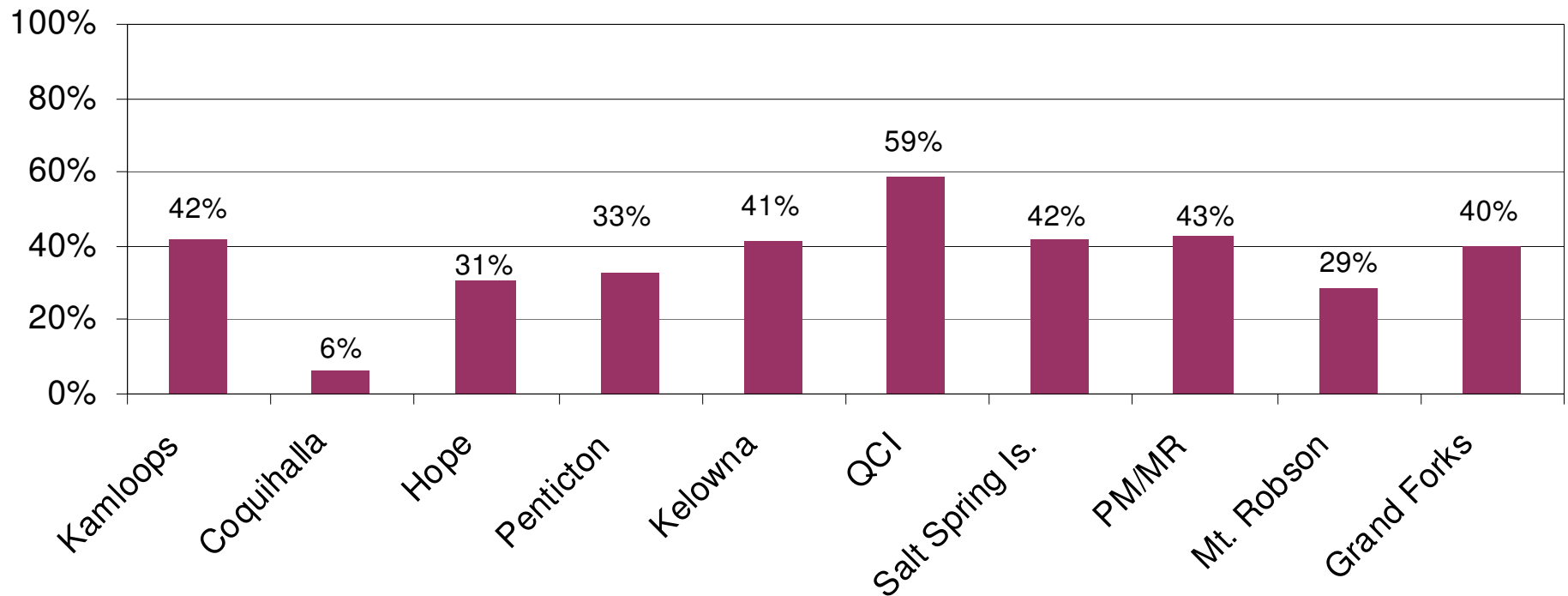


TOURISM BRITISH COLUMBIA  
CANADA

# Key Findings - Influence of the VIC

## Learn About Additional Activities

*On this trip did you learn about any new activities, attractions, events or destinations as a result of the information you received at the Visitor Info Centre?*



**TOURISM BRITISH COLUMBIA**  
CANADA

# Key Limitations

---

- Only representative of peak season
- Only representative of non-resident use of the VIC
- Small sample sizes at VICs with lower use (parties per hour is small)
- Cannot apply results from one VIC to another due to the variability
- We do not know how many people actually make another trip of those that say they will make another trip



# Applications

---

- The profile of travelers can be applied in different ways:
  - To ensure that the current information provided to VIC users reflects the interests and needs of travelers using the VIC
  - To design a marketing plan to attract travelers who do not currently use the VIC
  - To assist new and existing tourism businesses in their business planning and management
- The economic impact of the VIC can be used to:
  - Enhance VIC funding applications
  - Raise the profile of the VIC in the community
  - Examine return on investment (TBC and the community)



# New Programs at Tourism BC



TOURISM BRITISH COLUMBIA  
CANADA

# Strategic Framework

## OBJECTIVES

- Maximize the long-term benefits of the 2010 Winter Games throughout British Columbia.
- Achieve \$19.6 billion in visitor revenue by 2015, an average annual growth rate of 7.2%, achieving aggressive growth rates that are above the worldwide tourism growth rates, resulting in an increase in worldwide market share.

## STRATEGIES

### DEMAND

- More visitors
- Longer stay
- Higher yield

### SUPPLY

- Increase utilization
- Add new capacity and products
- Higher yield

## TACTICS AND PROGRAMS

### MARKET DEVELOPMENT

*Discover BC*  
MARKETING

*Target 2010*  
RESEARCH

### OLYMPICS

2010  
OLYMPICS

### INFRASTRUCTURE DEVELOPMENT

INFRASTRUCTURE  
DEVELOPMENT  
POLICY

### DESTINATION DEVELOPMENT

*WorldHost*  
HUMAN  
RESOURCES  
INITIATIVE

*Community  
Foundations*  
DEVELOPMENT

SPORT  
TOURISM  
DEVELOPMENT

*BC Experiences*

PRODUCT  
SECTOR  
DEVELOPMENT

*Circles of  
Opportunity*  
ABORIGINAL  
TOURISM  
DEVELOPMENT



TOURISM BRITISH COLUMBIA  
CANADA

# Strategic Priorities

---

- Attract more ***volume*** from BC resident and other close-in markets (markets that generate more trips per person)
- Increase business from ***high yield*** markets (markets that generate more dollars per trip)
- Enhance the visitor ***experience***
- Improve tourism business ***market readiness***



TOURISM BRITISH COLUMBIA  
CANADA



# Demand-side Strategies: Marketing

---

- Continue to build the *Super, Natural British Columbia* brand
- **Increase** interest in different seasons and for different regions of BC with appropriate markets
- **Increase** marketing efforts in key current leisure markets
- Initiate marketing efforts in new leisure markets

## Programs:

- Community Foundations Marketing
- Tourism Partners, Partners Plus
- City Stays, Meetings BC
- Experiences BC Marketing



TOURISM BRITISH COLUMBIA  
CANADA

# Supply-side Strategies: Development

---

- Develop more *market-ready* tourism experiences throughout BC
- Assist *new and emerging* tourism product sectors to develop market-ready tourism products and experiences
- Assist *communities* in creating long-term tourism marketing and development plans

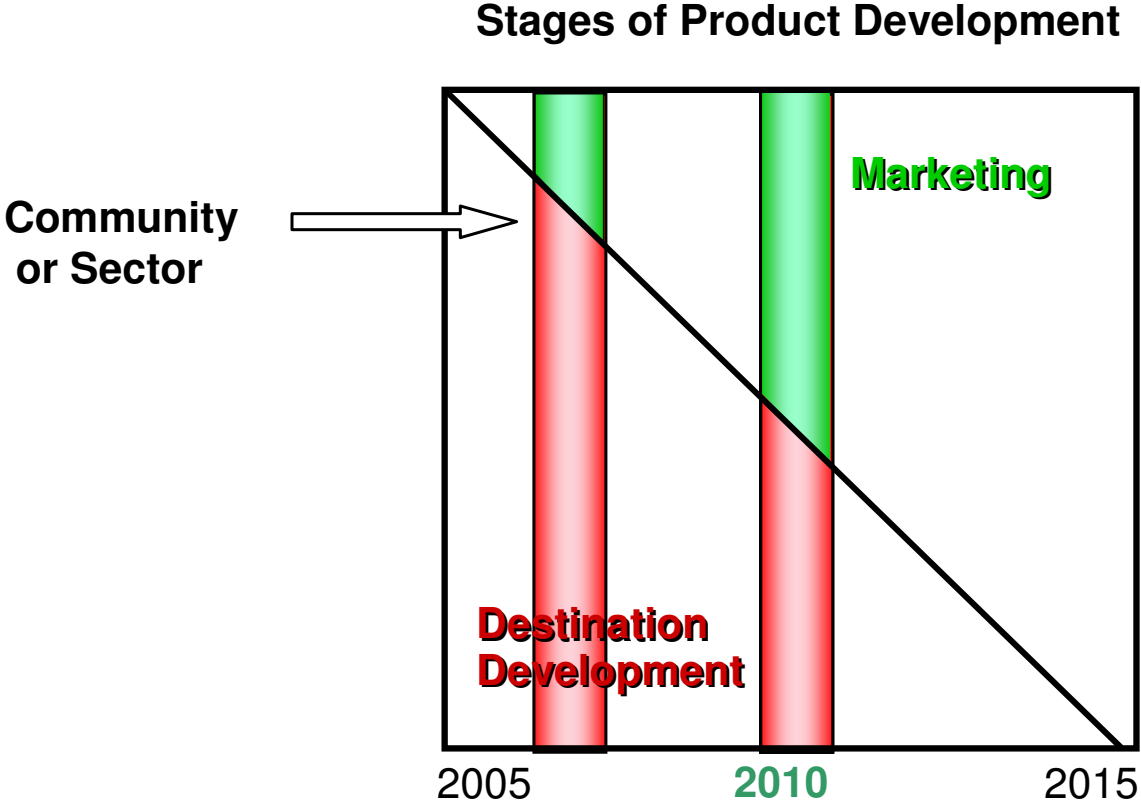
## Programs:

- **Community Foundations** – planning and development to help communities become market ready
- **Experiences BC** – tourism sector development to help sectors become market ready
- **Community Business Essentials** – expand program



TOURISM BRITISH COLUMBIA  
CANADA

# Stages of Product Development



## BC Experiences

---

- Assists provincial product sectors in creating an overall sector development and marketing plan
  - Cost shared funding
  - Assist new and emerging tourism product sectors
  - Product sector development and marketing plan that is province wide in scope
- Achieve increased integration within product sectors that operate across the province so businesses can grow at a faster rate



TOURISM BRITISH COLUMBIA  
CANADA

# BC Experiences - Research Needs

---

## Demand

- Macro – demand for products, projections, customer profiles, target markets
- Micro – role of product in trip planning, product quality requirements, etc.

## Supply:

- Inventory, product quality
- Capability, etc.

Product – Market Match Approach



TOURISM BRITISH COLUMBIA  
CANADA

# BC Experiences – TBC Research

---

## Current or completed research projects:

- Commercial Nature-Based Businesses in BC (WTA, LWBC)
- Economic Impacts of Diving (Dive Association)
- Recreational Fishing Survey (DFO, MoE)
- Spa (CTC, Other Provinces)
- Okanagan Cultural Corridor project (CTC, Local Govt.)
- **Travel Activities and Motivations Survey (TAMS)**
- Performance tracking:
  - Nature based tourism businesses
  - Attractions



TOURISM BRITISH COLUMBIA  
CANADA

# US – Enthusiasts Who Take Leisure Trips to Canada (TAMS)

---

	<b>2000</b>	<b>2025</b>	<b>Growth</b>
Total U.S.A. Adult Population	200.4	254.3	27%
Soft Outdoor Adventure	7.1	8.8	25%
Alpine Skiing	4.6	5.7	25%
<b>Hard Outdoor Adventure</b>	3.2	3.8	<b>20%</b>
<b>Heritage Enthusiasts</b>	8.3	12.3	<b>47%</b>
Performing Arts Enthusiasts	3.8	5.1	35%
Wine/Culinary Enthusiasts	5.5	7.5	35%



**TOURISM BRITISH COLUMBIA**  
CANADA

# Community Tourism Foundations



TOURISM BRITISH COLUMBIA  
CANADA



# Community Tourism Foundations

---

- Assists communities in creating a community tourism development plan
  - Cost-shared funding
  - Consistent planning model
- Enable communities to participate in the business of tourism in an efficient and sustainable manner
- Provide opportunities for communities to take full advantage of the increased interest in BC over the longer term
- Program Criteria Includes the ability and willingness of the community to participate in community and provincial research programs



TOURISM BRITISH COLUMBIA  
CANADA

# Community Tourism Foundations - Program

Planning/development to help communities become market ready

Process:

1. Initial Community Assessment
  - Determine scope of services required for community tourism development, etc.
2. Community Tourism Planning
  - SWOT, Research, enhance community and organizational capacity
3. Implementation
  - Partnership development, designing visitor service programs, SuperHost training, performance tracking, etc.
4. Evaluation

Graduate to Community Foundations Marketing



TOURISM BRITISH COLUMBIA  
CANADA

# CTF – Research Approach

---

Community Tourism Foundations program uses a consumer driven approach - product market match

What research might a community need to successfully realize its tourism potential?

- Who are the community's customers and potential customers?
- What are their needs?
- How can they be attracted?
- What products could the community potentially supply?
- Etc.



TOURISM BRITISH COLUMBIA  
CANADA

# CTF – Research Approach

---

## Menu of potential research needs:

1. Inventories
2. Opportunity assessments
3. Visitor surveys
4. Product – market match analysis
5. Community tourism performance tracking
6. Evaluation tools
7. Resident attitude surveys
8. Macro demand analysis & projections
9. Micro demand analysis
10. ??



TOURISM BRITISH COLUMBIA  
CANADA

# CTF – Research Approach

---

- Research Services will develop a set of research tools – a standard methodology for type of research need
- Assessment will determine which research products the community needs – prioritize research needs
- Local consultants (college/university students/faculty?) will be engaged to conduct required research, using standardized methodologies
- TBC will conduct quality assurance checks
- Communities (i.e. tourism industry members) will need to participate by sharing data, recruiting survey participants, etc.



# Community Research Tools:

1. Community Visitor Surveys  
– Prince George VIC

2. Performance Tracking  
- Provincial Accommodation Survey  
- DMO Accommodation Survey

3. Regional Partnership Projects  
- Northern Rockies – Alaska Hwy  
Visitor Survey



# Provincial Accommodation Survey

---



TOURISM BRITISH COLUMBIA  
CANADA

# Provincial Accommodation Survey - Method

---

1. Every month participating accommodation properties receive a survey asking for:
  - occupancy and ADR for the past month,
  - forecasts of occupancy and ADR for the next three months
  - Occ. and ADR for the same months of the previous year.
2. Completed surveys are returned to Research Services
3. Data is entered and aggregated results are reported to participating properties and DMOs
4. Results are reported for the province, tourism regions – and communities with sufficient levels of participation

Similar survey with GVRD Attractions – others coming

How can communities & DMOS use this information?



TOURISM BRITISH COLUMBIA  
CANADA



# Provincial Accom. Survey

Tourism Region	Reported/Forecast Change in Room Revenue			
	July	August	September	October
<b>Richmond</b>	<b>4.2%</b>	<b>9.0%</b>	<b>11.1%</b>	<b>7.0%</b>
VC&M	0.7%	6.4%	5.5%	5.4%
<b>Nanaimo</b>	<b>5.6%</b>	<b>4.3%</b>	<b>-6.8%</b>	<b>9.9%</b>
<b>Oceanside</b>	<b>10.5%</b>	<b>7.7%</b>	<b>12.5%</b>	<b>-8.5%</b>
<b>Victoria</b>	<b>-0.1%</b>	<b>-0.6%</b>	<b>2.8%</b>	<b>-0.7%</b>
Van. Island	3.4%	2.3%	4.2%	1.4%
<b>Kamloops</b>	<b>-5.9%</b>	<b>6.4%</b>	<b>5.7%</b>	<b>7.0%</b>
<b>Kelowna</b>	<b>-3.9%</b>	<b>4.2%</b>	<b>1.1%</b>	<b>2.9%</b>
TOTA	3.9%	5.8%	2.8%	5.5%
BC Rockies	-7.1%	7.6%	2.7%	-4.8%
Northern BC	7.2%	9.1%	6.5%	4.5%
CCC	8.6%	8.3%	5.0%	-1.9%
BC Total*	1.7%	5.6%	4.8%	3.9%



**TOURISM BRITISH COLUMBIA**  
CANADA

# DMO Accommodation Survey

---



TOURISM BRITISH COLUMBIA  
CANADA

# DMO Accommodation Survey - Background

---

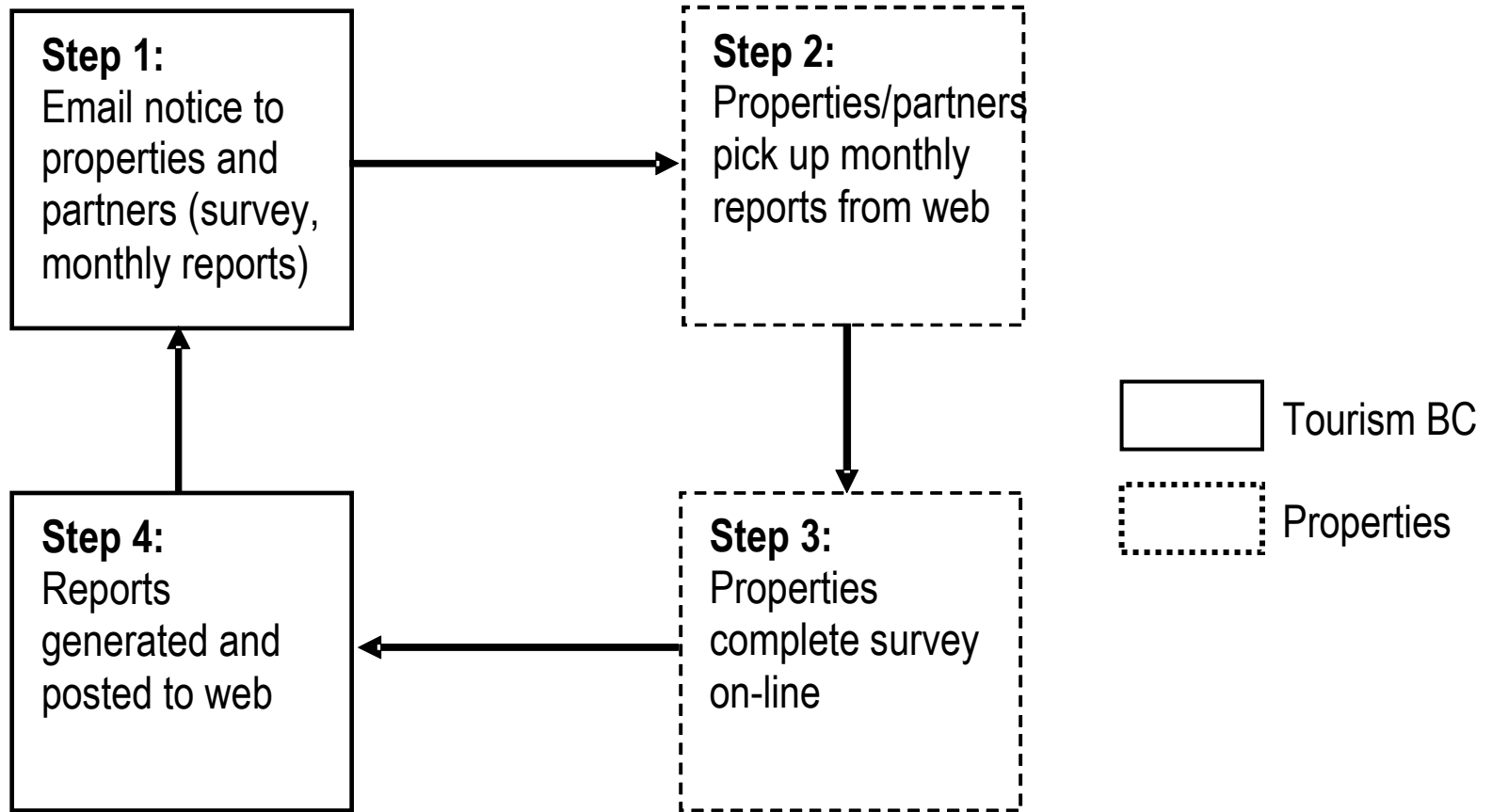
- Objectives:
  - To establish an **efficient** monthly system for collecting, analyzing and reporting **relevant and timely** data for properties, City/Regional DMOs and Tourism BC
    - Data to be used to develop and benchmark marketing programs and to identify new and emerging markets
- Pilot Project - Victoria
- Initial partners included CTC, TBC, Tourism Victoria and properties
- Consultative process used to establish original survey and reports and to develop on-line survey

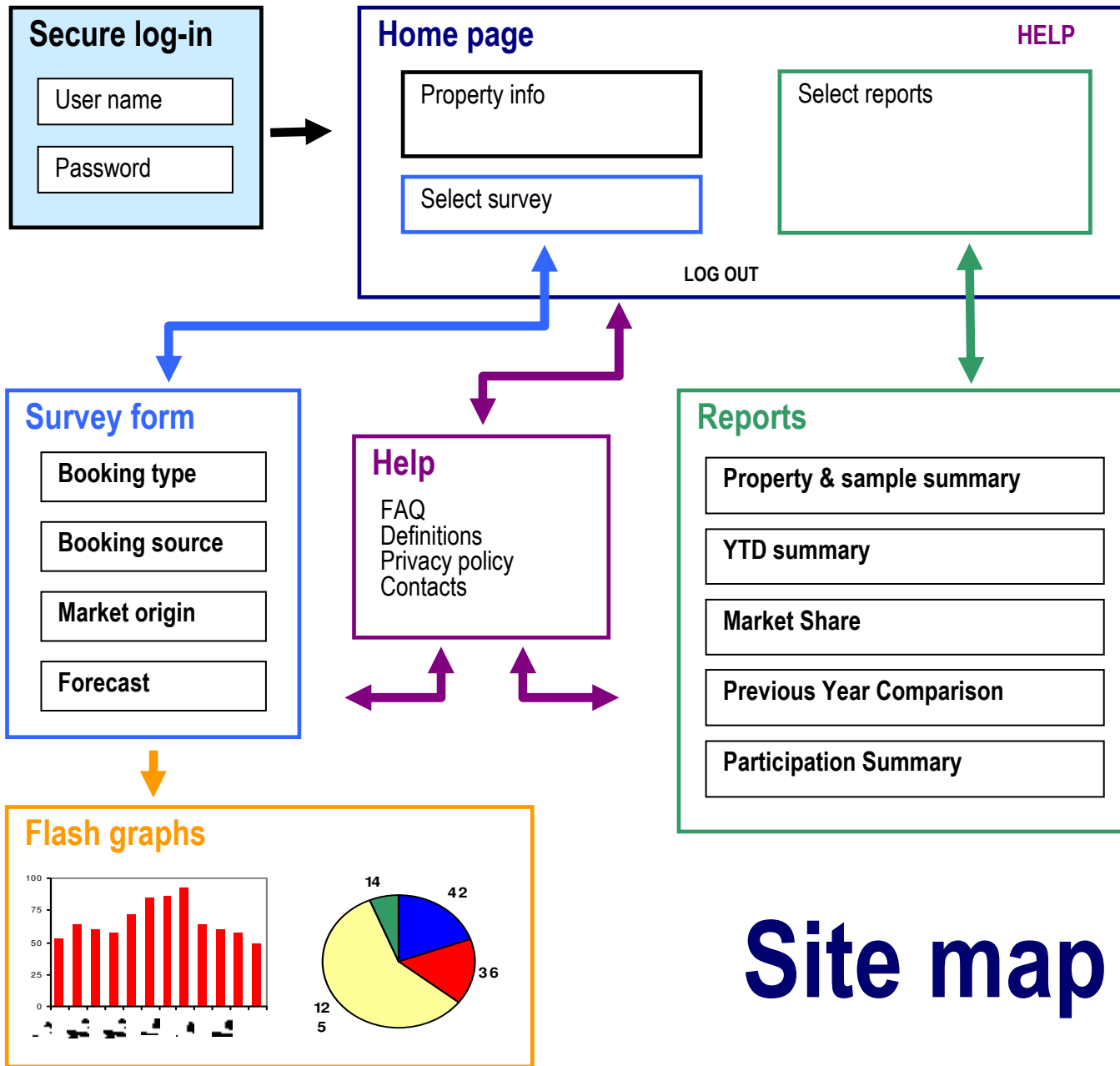


TOURISM BRITISH COLUMBIA  
CANADA

# Accommodation Survey – On-Line Model

---





# Site map

# Accommodation Survey - Property Home Page

 **TOURISM  
BRITISH  
COLUMBIA**  
CANADA

**VICTORIA COMMERCIAL ACCOMMODATION**  
ONLINE SURVEY

 **TOURISM  
Victoria**  
www.tourismvictoria.com

[HOME](#) [HELP](#)

## Demonstration Hotel

The contact person at your property is Jane Smith  
([Marcie.Dumais@tourism.bc.ca](mailto:Marcie.Dumais@tourism.bc.ca))  
Your property is part of **Sample X**.

Your survey for March 2004 is due the 15th of April.

March 2004

Victoria is one of few destinations in North America that collects data at this level of detail in partnership with industry. Thank you for your participation--consistent reporting is integral to the success of the survey.

For information about how survey data is protected, see [privacy policy](#).

*If you require assistance, please contact the [survey administrator](#).*

## Reports

Reports are currently based on historic data from March 2000 to February 2004.



<a href="#">Property &amp; Sample Summary</a>	Room information, booking type, source, and market origin for selected month and year to date
<a href="#">Year-to-date Summary</a>	Room information, booking type, source, and market origin for all months of the year
<a href="#">Market Share</a>	Property's share of room nights by booking type, source and market origin
<a href="#">Previous Year Comparison</a>	Percentage change versus same month in previous year
<a href="#">Monthly Participation Summary</a>	Summary of participating properties for a selected month
<a href="#">Special Reports</a>	



**TOURISM BRITISH COLUMBIA**  
CANADA

# Accommodation Survey - Survey Form

[Privacy Policy](#)

## VICTORIA COMMERCIAL ACCOMMODATION SURVEY

[HELP](#)

[HOME](#)

[SAVE](#)

[SUBMIT](#)

Demonstration Hotel

March 2004

### ROOM INFORMATION

Total room nights available

Total room nights occupied

Occupancy rate  %

Average room rate \$

Average length of stay

Total number of guests

### Room Nights by BOOKING TYPE

#### Independent travelers (IT)

Leisure  0

Long stay  0

Corporate  0

Government  0

Tour & travel  0

#### Group travelers

Association  0

Corporate  0

Government  0

Incentive  0

Sports teams  0

### Room Nights by MARKET ORIGIN

#### British Columbia

Vancouver Island  0

Lower Mainland  0

Other BC  0

Unallocated BC  0

#### Rest of Canada

Alberta  0

Sask & Manitoba  0

Ontario  0

Other Canada  0

Unallocated Canada  0



**TOURISM BRITISH COLUMBIA**  
CANADA

# Accommodation Survey - Report Selection

## Demonstration Hotel

The contact person at your property is Jane Citizen  
([Marcie.Dumais@tourism.bc.ca](mailto:Marcie.Dumais@tourism.bc.ca))  
Your property is part of **Sample X**.

Your survey for March 2004 is due the 15th of April.

March 2004

Victoria is one of few destinations in North America that collects data at this level of detail in partnership with industry. Thank you for your participation--consistent reporting is integral to the success of the survey.

For information about how survey data is protected, see [privacy policy](#).

*If you require assistance, please contact the [survey administrator](#).*

## Reports

Reports are currently based on historic data from March 2000 to February 2004.



### Property & Sample Summary

Room information, booking type, source, and market origin for selected month and year to date

Report Date: February 2004

Showing: Percentages

Format: Formatted (Adobe PDF)

### Year-to-date Summary

Room information, booking type, source, and market origin for all months of the year

Report Date: 2004

Showing: Percentages

Information for: All Properties

Format: All Properties (PDF)

### Market Share

Property's share of room nights by booking type, source and market origin

### Previous Year Comparison

Percentage change versus same month in previous year

### Monthly Participation Summary

Summary of participating properties for a selected month



TOURISM BRITISH COLUMBIA  
CANADA



# Accommodation Survey - Future Directions

---

- Survey launched (successfully) April 8<sup>th</sup>, 2004
- Use on-line accommodation survey as a pilot for other city destinations interested in accommodation sector data collection and analysis
- Expand to other city or regional destinations based on interest and need
- Expand to other sectors (ski, golf?)
- What does it take for a community to participate?



TOURISM BRITISH COLUMBIA  
CANADA

# Short Term Outlook - Victoria Pace

---



TOURISM BRITISH COLUMBIA  
CANADA

# Northern Rockies – Alaska Highway Visitor Survey

---



TOURISM BRITISH COLUMBIA  
CANADA

# Northern Rockies – Alaska Highway Visitor Survey

---



Interviewing  
at the Liard Hot Springs



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey

---

## Objectives:

- Provide information to support marketing and product development in the Northern Rockies-Alaska Highway region
- Learn about visitors:
  - demographics and trip characteristics
  - Pre-trip and during trip planning info sources
  - Activities and interests
  - Destination images and experiences
- Ratings for highway infrastructure



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Partners

---

- Alberta Economic Development
- Alberta North Tourism Destination Region
- Canadian Tourism Commission
- Doig River First Nation
- Fort Nelson First Nation
- Northern Rockies – Alaska Highway Tourism Association
- Northern Rockies Regional District
- Public Works & Government Services Canada
- Sci-Tech North
- Tourism Dawson Creek
- Tourism British Columbia

★With support from the Dawson Creek and Fort Nelson VICs, BC Parks, BC Hydro, and tourism business operators



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Methods

---

- We focused on people who were:
  - Away from home one or more nights
  - Traveling for leisure, to visit friends and family, or on business
  - Traveling independently (not with a tour group)
  - Traveling to and through Northeast BC



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Methods

---

## Phase 1 On-site interviews & traffic counts

Crews in Dawson Creek and Fort Nelson using palm pilot technology

Recorded vehicle type & origin to estimate visitor volume

## Phase 2 Mail-back survey

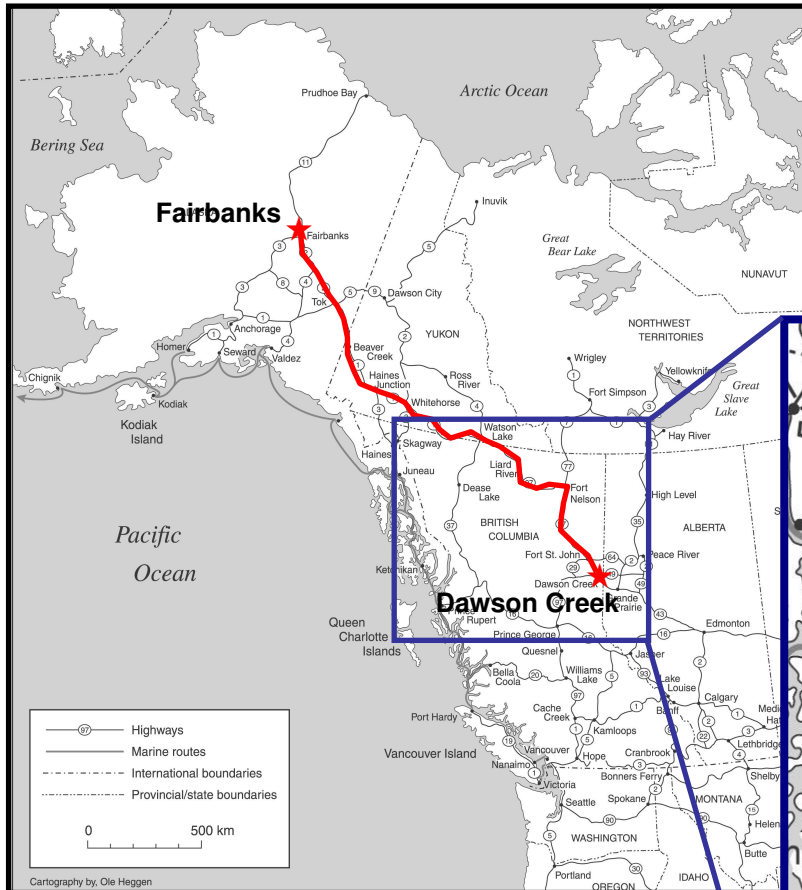
Detailed questions about activities, destination images, travel route, planning while traveling.



TOURISM BRITISH COLUMBIA  
CANADA

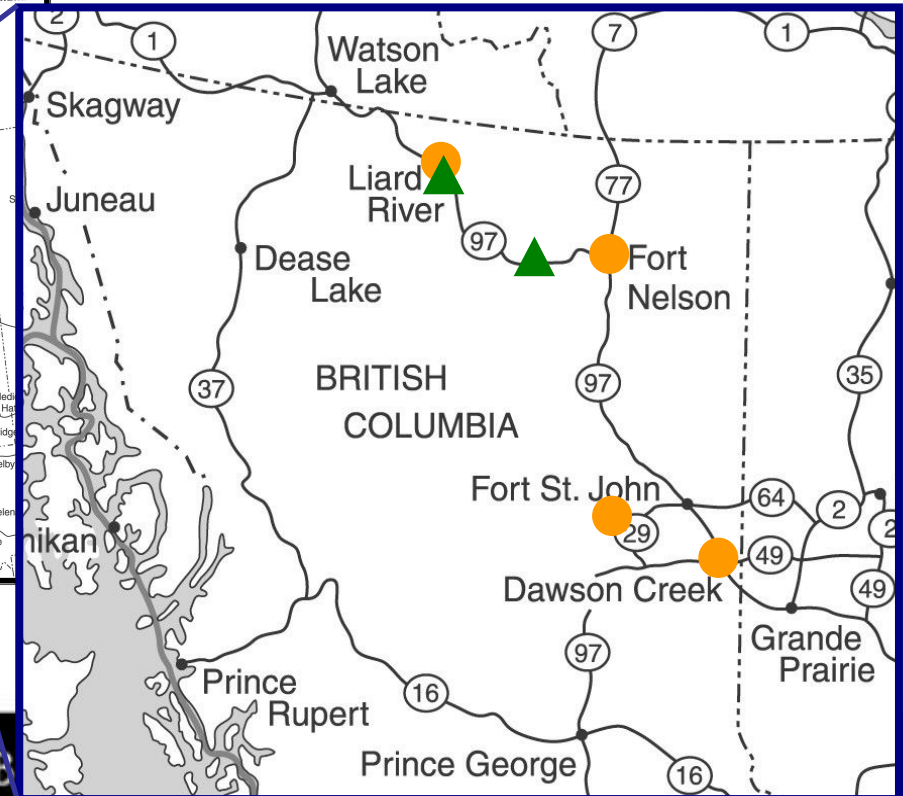


# Alaska Hwy Visitor Survey – Field Locations



Map by Ole Heggen, University of Victoria

- Interview locations
- ▲ Traffic count locations



TOURISM  
CANADA

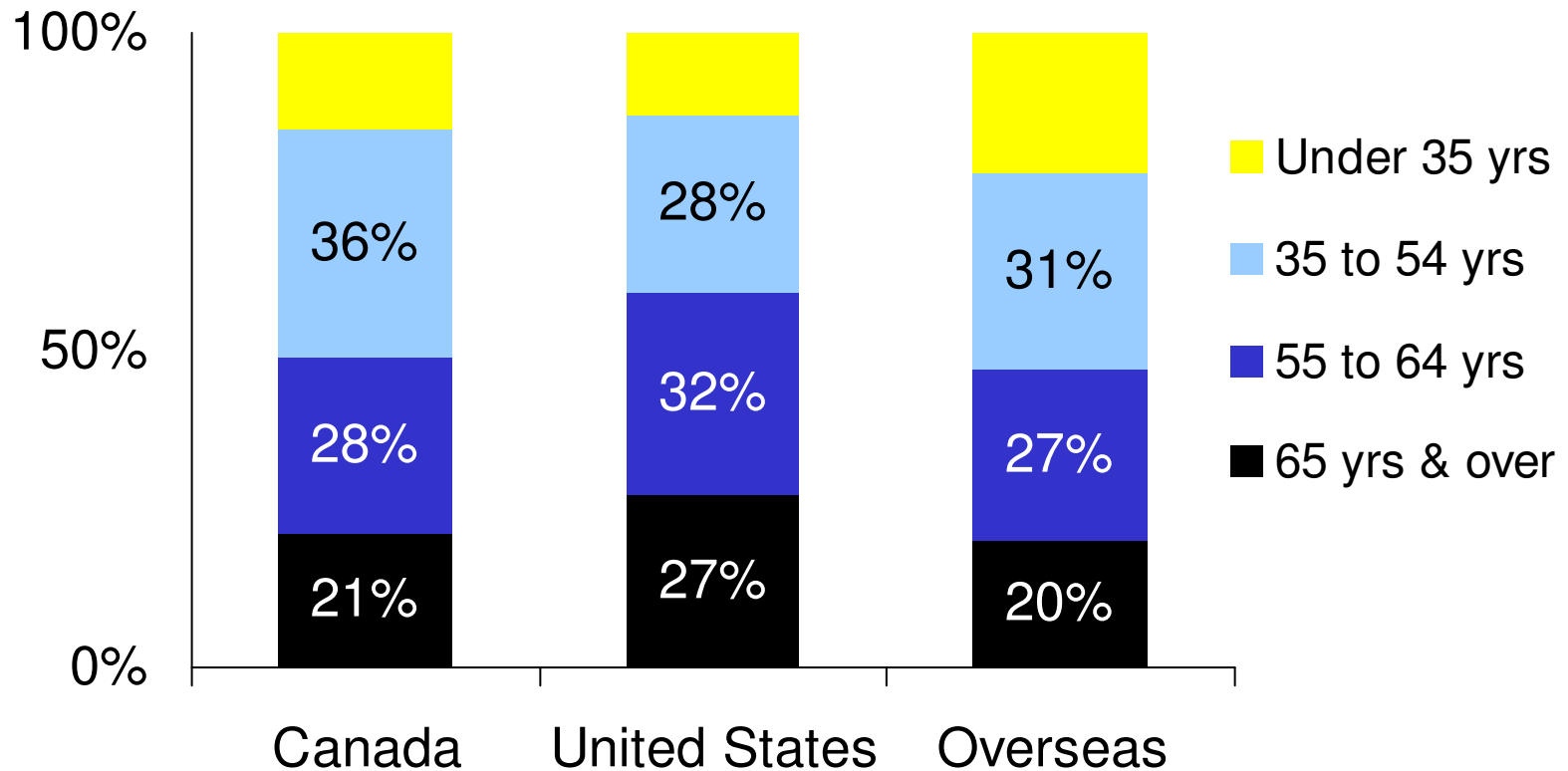
# Alaska Hwy Visitor Survey - Response Rates

---

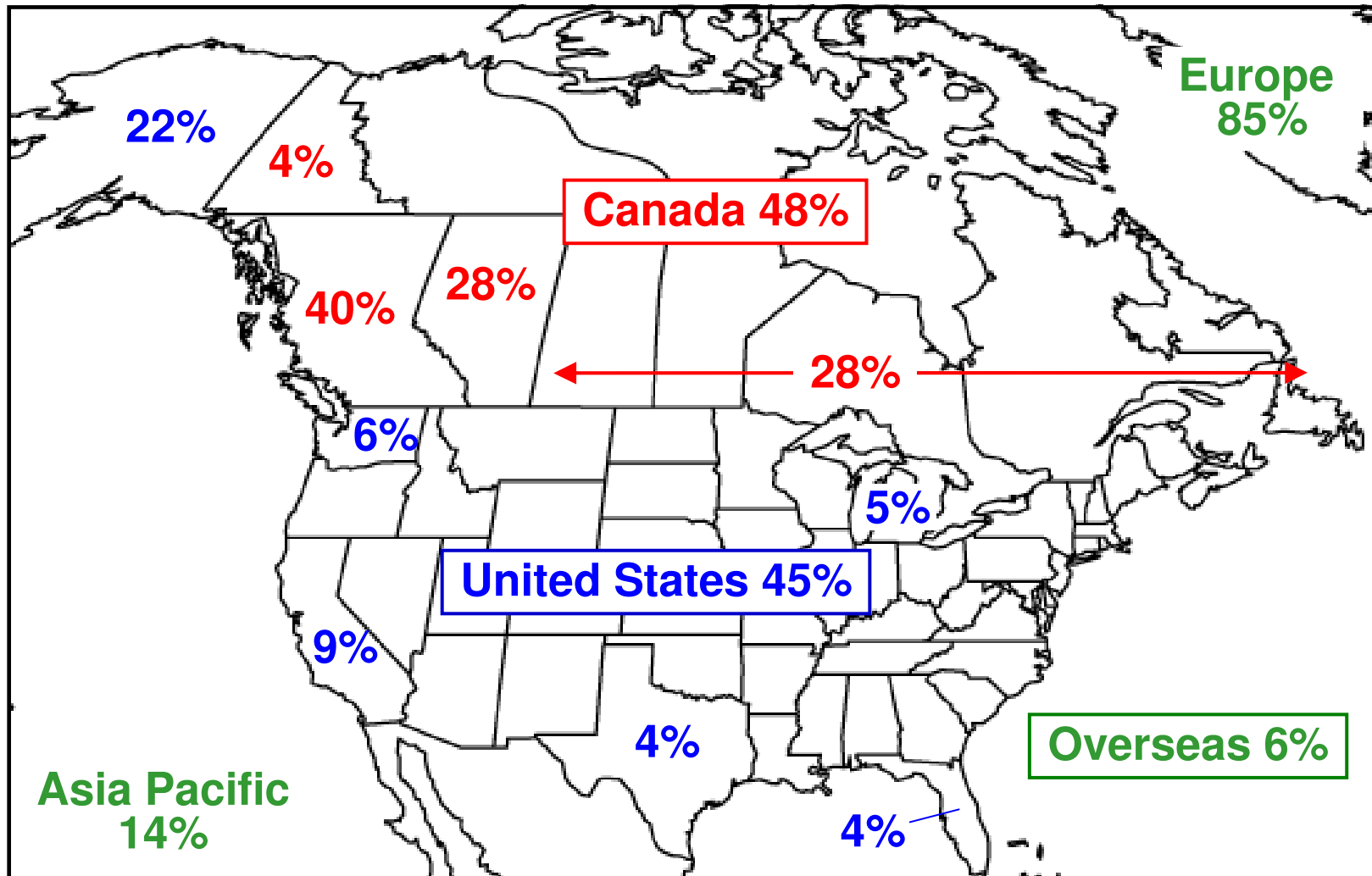
Contacted	4,182	←
Interviewed	3,276	<b>78%</b>
In target population	2,817	←
Permission for mail survey	1,988	<b>71%</b>
Returned survey	1,175	<b>59%</b>



# Alaska Hwy Visitor Survey - Age profile



TOURISM BRITISH COLUMBIA  
CANADA



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Main destination

Origin	Alaska	NE BC	Yukon	Circle
<b>Canada</b>	<b>20%</b>	<b>27%</b>	<b>24%</b>	<b>17%</b>
BC, AB, YT	14%	32%	24%	18%
Long haul	37%	12%	24%	15%
<b>United States</b>	<b>76%</b>	<b>2%</b>	<b>1%</b>	<b>6%</b>
Alaska	31%	2%	0%	11%
Lower 48 states	88%	2%	2%	5%
<b>Overseas</b>	<b>40%</b>	<b>8%</b>	<b>11%</b>	<b>31%</b>



# Alaska Hwy Visitor Survey - Trip length

---

- Average trip: **39 nights**
- Regional travelers
  - BC, Alberta, Yukon, Alaska: **20 nights**
- Long-haul travelers
  - Canadians: **43 nights**
  - Lower 48 states: **53 nights**
  - Overseas: **62 nights**



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Flexibility

---

- Two-thirds had flexible travel schedules
- 80% had few or no activities planned
- One-in-10 travelers extended their trip
  - Stayed an additional 7 nights
- But 6-in-10 wanted to extend their trip
  - Constrained by work or prior commitments



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Travel motivations

Importance in decision to take the trip	Very important + important
See wildlife and wild landscapes	92%
Visit places we'd never seen before	87%
A journey we heard about and always wanted to make	76%
Enjoy outdoor activities	71%
Travel in places where we feel safe	69%
Learn about the history of the Alaska Highway	54%
Learn about the local way of life by meeting local people	54%
Better understand First Nations or aboriginal culture	34%



TOURISM BRITISH COLUMBIA  
CANADA



# Alaska Hwy Visitor Survey - Trip planning

---

- Regional travelers
  - BC, Alberta, Yukon, Alaska
  - Short planning horizons
    - 65% plan within 3 months
- Long haul travelers
  - Eastern Canada, Lower 48 states
  - Long horizons
    - 60% plan for more than 4 months
    - 40% plan for more than a year



TOURISM BRITISH COLUMBIA  
CANADA

# Alaska Hwy Visitor Survey - Info for planning

All sources	Canada	United States	Overseas	Overall
Internet	35%	46%	60%	42%
Word of mouth	34%	34%	33%	34%
The <i>Milepost</i>	12%	55%	9%	31%
Past experience	36%	28%	16%	31%
Visitor Info Centres	28%	22%	28%	25%
Agents	20%	18%	22%	19%
Books	14%	21%	41%	19%
Brochures	17%	18%	13%	17%



# Alaska Hwy Visitor Survey - Info while traveling

All sources	Canada	United States	Overseas	Overall
VIC counselors	<b>72%</b>	<b>68%</b>	<b>86%</b>	<b>71%</b>
The <i>Milepost</i>	47%	<b>89%</b>	32%	<b>64%</b>
Brochures	<b>61%</b>	<b>64%</b>	<b>78%</b>	<b>63%</b>
Past experience	<b>63%</b>	57%	49%	59%
Advice from locals	52%	61%	56%	56%
Advice from travelers	50%	59%	43%	53%
Internet	40%	41%	54%	42%
Books	30%	41%	<b>72%</b>	38%



# Alaska Hwy Visitor Survey - Most useful info

	Canada	United States	Overseas	Overall
The <i>Milepost</i>	<b>26%</b>	<b>71%</b>	<b>22%</b>	<b>45%</b>
VIC counselors	<b>23%</b>	4%	<b>19%</b>	<b>14%</b>
Past experience	<b>17%</b>	<b>9%</b>	12%	<b>14%</b>
AAA guides	7%	4%	0%	<b>5%</b>
Advice from travelers	6%	4%	3%	5%
Other sources	5%	2%	11%	4%
Internet	5%	1%	4%	3%
Books	2%	2%	<b>16%</b>	3%
Advice from locals	4%	2%	2%	3%



TOURISM BRITISH COLUMBIA  
CANADA

# Thank You!! - For more information

---

TOURISM  
BRITISH  
COLUMBIA



C A N A D A

**Richard Porges**  
Director, Research Services  
Tourism British Columbia

(250) 356-9936

*Richard.Porges@tourismbc.com*

**Website = [www.tourismbc.com/research](http://www.tourismbc.com/research)**



TOURISM BRITISH COLUMBIA  
C A N A D A

# Commercial Nature Based Tourism

---



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Objectives

---

## Primary

- Measure the economic impact of commercial nature-based tourism in BC

## Secondary

- Initiate on-going tracking on nature-based tourism industry
- Framework for greater regional/sector detail
- Understand constraints to growth
- Collect data for marketing purposes

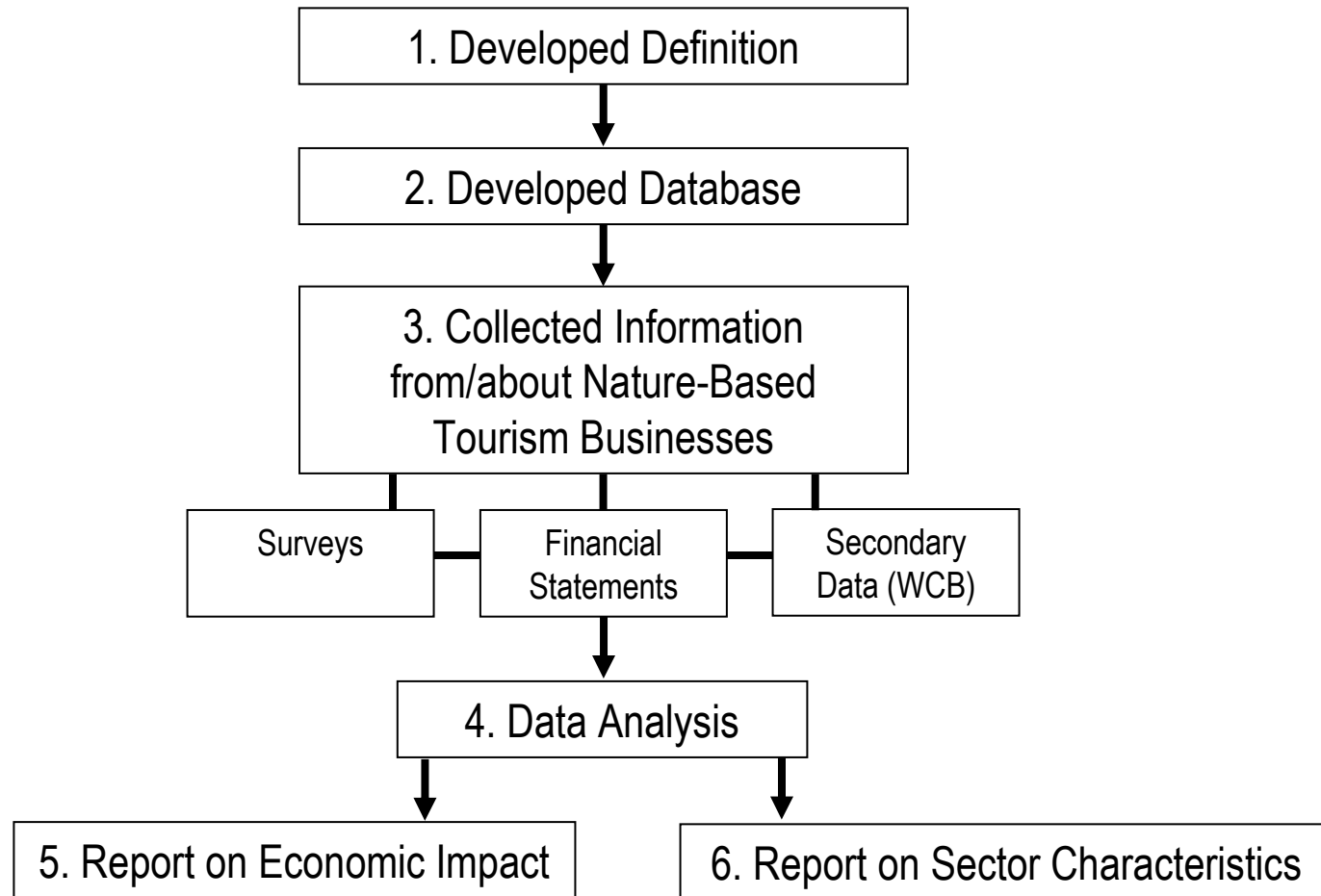
Partners: Wilderness Tourism Association, MSRM



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Methods

---





# CNBT - Definition

---

- In conjunction with WTA - workshop with businesses in February 2002
- *Tourism experiences that are directly or indirectly dependent on the natural environment and require a land or water base*
  - largely activities in the mid and backcountry zones (no golf/downhill skiing)
  - business actively markets
  - primary revenue source is guests/clients – i.e. not retail sales
  - can estimate percentage of revenues from tourists
  - list of 33 activities



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT – Findings: Economic Impacts

---

In 2001

- 2,250 businesses
- 966,000 clients
- 2.5 million client days
- Spent \$908.9 million at nature-based tourism businesses
- Overall, 22.4 million tourists spent \$9.2 billion in BC
- Nature-based businesses generate ~10% of industry revenue



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Findings: Sector Characteristics

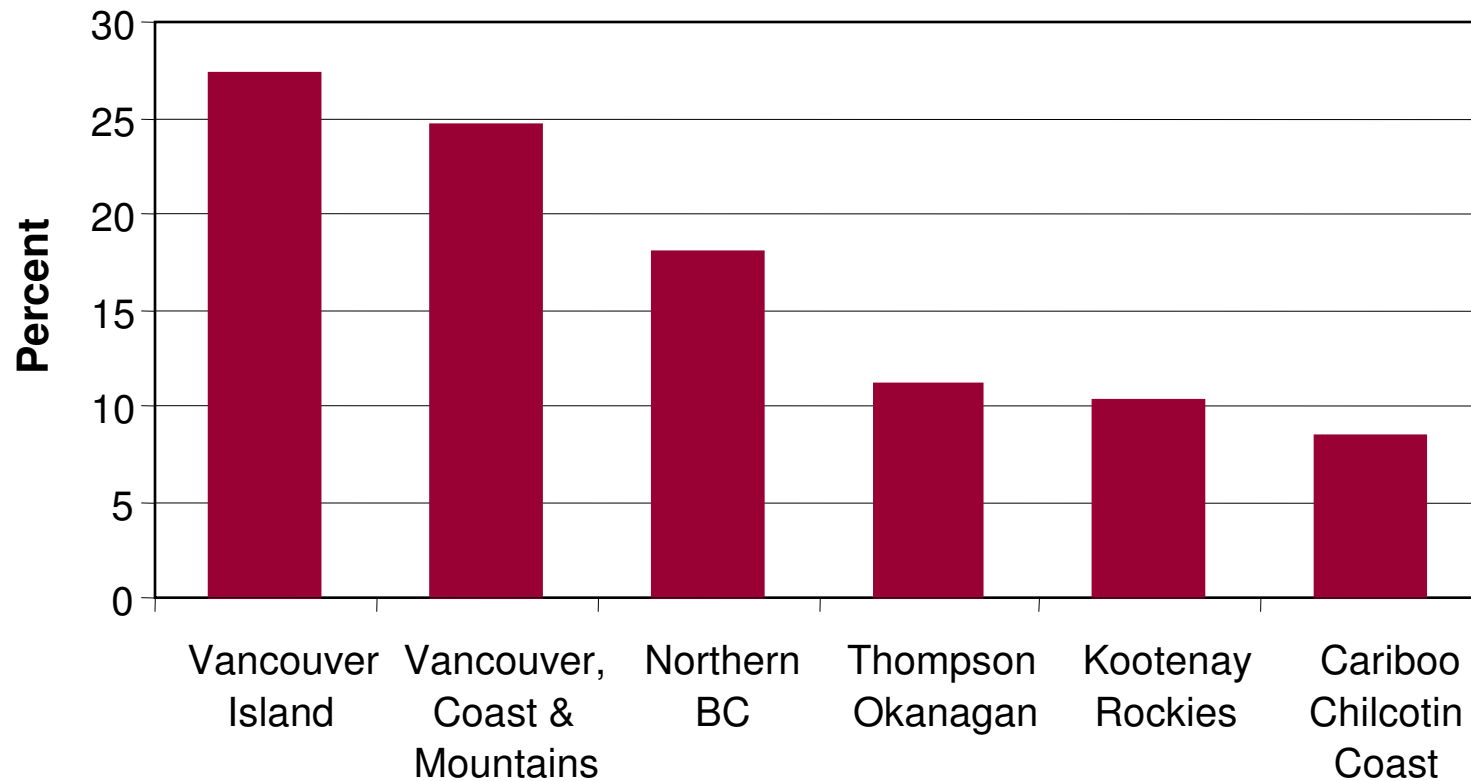
<b>Saltwater Based</b>		<b>38%</b>	<b>Land Based (Lodge)</b>		<b>18%</b>
Boat Charters ( <i>most SW</i> )	14%		Guide Outfitters	11%	
SW Fishing Lodges	6%		Destination Lodges	4%	
SW (Ocean) Kayaking	6%		Guest Ranches	3%	
Sail Cruising	4%				
SW Fishing (No Lodge)	3%				
Scuba Diving	2%				
Marine Wildlife Viewing	2%				
Pocket Cruising	<1%				
<b>Land Based (Winter &amp; Summer)</b>		<b>27%</b>	<b>Freshwater Based</b>		<b>17%</b>
Land-Based Summer	19%		FW Fishing Lodges	7%	
Land-Based Winter	5%		FW Fishing (No Lodge)	5%	
Mountain Biking	2%		River Rafting	4%	
Heli-Skiing	1%		FW Kayaking/Canoeing	2%	



**TOURISM BRITISH COLUMBIA**  
CANADA

# CNBT - Findings: Sector Characteristics

Percent of Commercial Nature-Based Tourism Businesses  
by Tourism Region



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT – Findings: Business Characteristics

---

- Most businesses were small
  - 55% < 3 full time staff members
  - 25% between 3 and 10 full time staff members
- Average of 88% of revenue came from tourists
- Expenditures were:
  - 22% labour
  - 15% transportation and fuel
  - 11% on maintenance
  - 9% on advertising/promotion
  - 9% new facilities/equipment
  - 8% food and beverage
  - 6% liability insurance
  - 5% mortgage and rent



# CNBT – Findings: Business Characteristics

---

- Booking Sources
  - 40% repeat guests
  - 30% marketing
  - 23% word of mouth
  - 6% drive by/walk in
- Marketing
  - Use ~ 3 marketing methods
  - Brochures/posters, website, direct mail, consumer trade shows and another website were top five methods
  - ~50% participated in co-operative marketing programs



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Findings: Client Characteristics

---

- Market of Origin
  - 29% from BC, 17% other Canada
  - 17% Northwest USA, 18% other USA
  - 14% Europe, 2% Asia, 3% Other
- 62% male
- 50% between 35 and 54
- 45% couples or family



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT Findings: Constraints to Growth

---

- 22 different constraints to growth (transportation, business development, government regulation, land-use issues and human resources)
  - 58% - Too much industry regulation
  - 51% - Lack of long term guarantee of tenuring to the land base
  - 51% - Competition for natural resources among multiple industries
  - 48% - High marketing costs
  - 44% - Lack of security regarding long term integrity of viewscapes





# CNBT - Implications

---

## Businesses

- Focus on tourism is important for success
- Guided activities generate most revenue
- Partnerships are important (accommodation, co-op marketing)
- Excellent service is essential as the majority of clients are repeat visitors or come from word of mouth
- Successful businesses use a variety of marketing methods
- Focus on male, middle-aged clients from BC, Canadian and NW US markets



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Limitations

---

- Provides a benchmark - number of businesses always changing
- Does not measure:
  - frontcountry nature-based experiences like downhill skiing or golfing
  - self-guided nature-based experiences
  - tourist expenditures before and after visiting the nature-based tourism business
  - non-tourists (locals) using the nature-based tourism business



TOURISM BRITISH COLUMBIA  
CANADA

# CNBT - Next Steps

---

- Build on work already completed
  1. Update sector characteristics/impacts
  2. Increase sector and regional detail
  3. Client survey
    - Offsite expenditures
    - Demographics
    - Motivations/perceptions
    - Marketing insights



TOURISM BRITISH COLUMBIA  
CANADA