Making Research Count: Applying Research to Support Community Tourism Development

Richard Porges
Research Services, Tourism British Columbia
October 6th, 2005
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 and BC Economy
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.
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

Visitor Volume = 22.5 million

Visitor Revenue = $9.5 billion
2004 Room Revenue by Tourism Region

Total = $1.6 billion
Room Revenue – Williams Lake

Other Indicators: VIC parties, Airport, ?

Jan. - June 2005 + 15.4%
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.

- Wood & Paper Products: $15.0 billion
- Energy: $4.5 billion
- Tourism: $4.1 billion
- Machinery & Equipment: $3.1 billion
- Metallic Minerals: $2.1 billion
- Agriculture and Food: $1.5 billion
- Fish Products: $1.0 billion

$ Billions

- Tourism industry employed 115,461 British Columbians

- Tourism accounted for 7.2% of jobs in BC (1 in 14 jobs)
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

![Pie chart showing tourism-related business establishments by sector.]

- **Food & beverage** 52.7%
- **Transportation** 19.4%
- **Accommodation** 11.5%
- **Amusement, gambling & recreation** 10.1%
- **Other** 6.3%
2005 Performance YTD
<table>
<thead>
<tr>
<th>Indicator</th>
<th>Change</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Int. Overnight Customs Entries</td>
<td>-0.6%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>USA</td>
<td>-2.8%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>2.5%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>Europe</td>
<td>8.3%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>Provincial Room Revenue</td>
<td>4.1%</td>
<td>(Jun)</td>
</tr>
<tr>
<td>Provincial Occupancy</td>
<td>3.5%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>Provincial Average Daily Room Rate</td>
<td>-1.5%</td>
<td>(Jul)</td>
</tr>
</tbody>
</table>
## 2005 YTD Tourism Indicators (vs.2004) 2/2

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Change</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vancouver Int. Airport</td>
<td>5.5%</td>
<td>(Jul)</td>
</tr>
<tr>
<td>Regional Airports</td>
<td>Most up</td>
<td>(Aug)</td>
</tr>
<tr>
<td>BC Ferries</td>
<td>-0.3%</td>
<td>(Aug)</td>
</tr>
<tr>
<td>Commercial Restaurant Receipts</td>
<td>10.7%</td>
<td>(Jun)</td>
</tr>
<tr>
<td>Visitor Info Centres</td>
<td>3.3%</td>
<td>(Aug)</td>
</tr>
<tr>
<td>Coquihalla</td>
<td>2.7%</td>
<td>(Aug)</td>
</tr>
<tr>
<td>Cruise (Vancouver)</td>
<td>-0.3%</td>
<td>(Aug)</td>
</tr>
<tr>
<td>Conference Centre (Vancouver)</td>
<td>-6.4%</td>
<td>(Aug)</td>
</tr>
<tr>
<td>Conference Centre (Victoria)</td>
<td>-19.9%</td>
<td>(Aug)</td>
</tr>
</tbody>
</table>
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 Indicators 2000 – 2005
International Visitors 2000 – 2005

- A/P
- Europe
- US (right axis)

* 2005 Est
Hotel Room Revenue 2001 - 2005

Change Over Same Month Previous Year
Provincial Hotel Revenue

-15.0%
-10.0%
-5.0%
0.0%
5.0%
10.0%
15.0%
20.0%

Jan '01
Mar '01
May '01
Jul '01
Sep '01
Nov '01
Jan '02
Mar '02
May '02
Jul '02
Sep '02
Nov '02
Jan '03
Mar '03
May '03
Jul '03
Sep '03
Nov '03
Jan '04
Mar '04
May '04
Jul '04
Sep '04
Nov '04
Jan '05
Mar '05
May '05

June 2000 – $142.1 M  June 2005 – $160.9 M
Provincial Occupancy 2001 - 2005

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

July 2000 – 78.0%
July 2005 – 78.7%

9/11
SARS
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

Iraq War
9/11
SARS
Forest Fires

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

Tourism British Columbia
Canada
About Tourism British Columbia
Tourism British Columbia

- 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

**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 BC - Mandate

Consumer Purchase Cycle

Awareness → Interest → Purchase → Loyalty

Technology

Research

Consumer Promotion
Trade Sales & Promotion
Visitor Services
Industry Development
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
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)
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


Whistler

Corno Ski Camp Whistler/BC, 7 Tage inkl. Ski, Board, erwachsene Unterkunft in 3 Bewertung, Skilift, Snowboard, Nylon. Ein Angebot von Corno International


CRD Skicamp Whistler/BC, 9 Tage inkl. Ski, Board, erwachsene Unterkunft in 3 Bewertung, Skilift. Ein Angebot von Corno International

106 Pisten, 5 Lifts, längste Gleite: 18 km, www.kickinghorsemount.com

Kicking Horse

Piney Lodge, Cuemése Lodge mit nur 10 Zimmern im Whistler Ski, nur wenige Schritte von der Lodge, €99,- inkl. amerikanisches Frühstück

Panorama Mountain Village


Big White

8 Tage Big White oder Silver Star, von Continental Powder, Downhill, Lien, Pisten, Skifahren und ein Skilift inklusive bei CANUSA

118 Pisten, 11 Lifts, längste Gleite: 2.3 km, www.bighwhite.com

& Silver Star

1.049 €

128 Pisten, 9 Lifts, längste Gleite: 5.5 km, www.panoramamontain.com

Panorama Mountain Village

13 Tage SELF-DRIVE, inkl. Flug, 17 Tage Mietwagen, 11 Aprés-Ski Angebote inklusive, Fünfsterne Hotel, 9 Nächte Golden inkl. RED, Fünfsterne Panorama, 2 Tage Skigebiet

Ein Angebot von Ragen Alpin Tours

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

©Big White © Fernie © Kicking Horse © Kimberley © Lake Louisa © Silver Star
© Ski Banff © Norquay © Ski Jasper © Sunahina Village © Whistler

TOURISM BRITISH COLUMBIA
CANADA
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)
Research Services – Our Team

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

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 ongoing sector performance
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.
Visitor Info Centre Research
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)
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
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
Value of the VIC-Study Design

Each survey has two phases:

1. Intercept Interviews

2. Mailback Surveys
Value of the VIC-Methods (Analysis)

Mailback Survey – responses could vary due to 3 factors

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)
Value of the VIC-Study Design

Each survey has two locations:

1. Visitor Info Centre  
2. Reference Site
VIC Research - Study Design

VIC

Interviews

Mailback Surveys

Compare

Reference Site

Interviews

Mailback Surveys

Compare

Compare
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
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)
## Value of the VIC-Response Rates

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

- Percentage that will participate:
  - Visit a museum, heritage attraction or historic site: 47.3%
  - Participate in nature-based activities: 45.9%
  - Participate in arts and cultural activities: 23.4%
  - Attend a festival or event: 12.3%

- Important / Very Important:

---

Visit a museum, heritage attraction or historic site
Participate in nature-based activities
Participate in arts and cultural activities
Attend a festival or event

% that will participate
Important / Very Important
Trip Flexibility – Prince George

Trip Flexibility Regarding Time in Prince George

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Inflexible (you have to depart at a set time)</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Moderately Flexible (you can change the time of the day of departure)</td>
<td></td>
</tr>
<tr>
<td>52</td>
<td>Very Flexible (you can change the day of departure)</td>
<td></td>
</tr>
</tbody>
</table>
Trip Flexibility – Prince George

Trip Flexibility Regarding Activities in Prince George

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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Inflexible (all activities are planned)</th>
<th>Moderately Flexible (about half of activities are planned)</th>
<th>Very Flexible (less than half of activities are planned)</th>
</tr>
</thead>
<tbody>
<tr>
<td>77</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Influence of VIC – Prince George

Prince George VIC Impacts on Traveler Behaviour

- Learned About New Activities, Places, or Attractions*: 31%
- Would Stay at Least One Extra Night**: 12%
- Would Make Another Trip in British Columbia***: 81%
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?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kamloops</td>
<td>42%</td>
</tr>
<tr>
<td>Coquihalla</td>
<td>6%</td>
</tr>
<tr>
<td>Hope</td>
<td>31%</td>
</tr>
<tr>
<td>Penticton</td>
<td>33%</td>
</tr>
<tr>
<td>Kelowna</td>
<td>41%</td>
</tr>
<tr>
<td>QCI</td>
<td>59%</td>
</tr>
<tr>
<td>Salt Spring Is.</td>
<td>42%</td>
</tr>
<tr>
<td>PMMR</td>
<td>43%</td>
</tr>
<tr>
<td>Mt. Robson</td>
<td>29%</td>
</tr>
<tr>
<td>Grand Forks</td>
<td>40%</td>
</tr>
</tbody>
</table>
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
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

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

<table>
<thead>
<tr>
<th>Enthusiast Type</th>
<th>2000</th>
<th>2025</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total U.S.A. Adult Population</td>
<td>200.4</td>
<td>254.3</td>
<td>27%</td>
</tr>
<tr>
<td>Soft Outdoor Adventure</td>
<td>7.1</td>
<td>8.8</td>
<td>25%</td>
</tr>
<tr>
<td>Alpine Skiing</td>
<td>4.6</td>
<td>5.7</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Hard Outdoor Adventure</strong></td>
<td>3.2</td>
<td>3.8</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Heritage Enthusiasts</strong></td>
<td>8.3</td>
<td>12.3</td>
<td>47%</td>
</tr>
<tr>
<td>Performing Arts Enthusiasts</td>
<td>3.8</td>
<td>5.1</td>
<td>35%</td>
</tr>
<tr>
<td>Wine/Culinary Enthusiasts</td>
<td>5.5</td>
<td>7.5</td>
<td>35%</td>
</tr>
</tbody>
</table>
Community Tourism Foundations
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
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
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.
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. ??
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
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?
## Provincial Accom. Survey

<table>
<thead>
<tr>
<th>Tourism Region</th>
<th>Reported/Forecast Change in Room Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>July</td>
</tr>
<tr>
<td>Richmond</td>
<td>4.2%</td>
</tr>
<tr>
<td>VC&amp;M</td>
<td>0.7%</td>
</tr>
<tr>
<td>Nanaimo</td>
<td>5.6%</td>
</tr>
<tr>
<td>Oceanside</td>
<td>10.5%</td>
</tr>
<tr>
<td>Victoria</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Van. Island</td>
<td>3.4%</td>
</tr>
<tr>
<td>Kamloops</td>
<td>-5.9%</td>
</tr>
<tr>
<td>Kelowna</td>
<td>-3.9%</td>
</tr>
<tr>
<td>TOTA</td>
<td>3.9%</td>
</tr>
<tr>
<td>BC Rockies</td>
<td>-7.1%</td>
</tr>
<tr>
<td>Northern BC</td>
<td>7.2%</td>
</tr>
<tr>
<td>CCC</td>
<td>8.6%</td>
</tr>
<tr>
<td>BC Total*</td>
<td>1.7%</td>
</tr>
</tbody>
</table>
DMO Accommodation Survey
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
Accommodation Survey – On-Line Model

Step 1:
Email notice to properties and partners (survey, monthly reports)

Step 2:
Properties/partners pick up monthly reports from web

Step 3:
Properties complete survey on-line

Step 4:
Reports generated and posted to web
**Demonstration Hotel**

The contact person at your property is Jane Smith (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.

**Year-to-date Summary**
Room information, booking type, source, and market origin for all months of the year.

**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.

**Special Reports**
## Accommodation Survey - Survey Form

### Victoria Commercial Accommodation Survey

**Demonstration Hotel**

**March 2004**

### Room Information

<table>
<thead>
<tr>
<th>Total room nights available</th>
<th>Average room rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total room nights occupied</td>
<td>Average length of stay</td>
</tr>
<tr>
<td>Occupancy rate</td>
<td>Total number of guests</td>
</tr>
</tbody>
</table>

### 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 (Marie.Dumais@tourism.bc.ca). Your property is part of Sample X.

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

March 2004 [ ] Go to Survey

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)

Download Report

**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.
Accommodation Survey - Future Directions

- Survey launched (successfully) April 8\textsuperscript{th}, 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?
Short Term Outlook - Victoria Pace
Northern Rockies – Alaska Highway Visitor Survey
Northern Rockies – Alaska Highway Visitor Survey

Interviewing at the Liard Hot Springs
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
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
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
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.
Alaska Hwy Visitor Survey – Field Locations

Map by Ole Heggen, University of Victoria
## Alaska Hwy Visitor Survey - Response Rates

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacted</td>
<td>4,182</td>
<td></td>
</tr>
<tr>
<td>Interviewed</td>
<td>3,276</td>
<td>78%</td>
</tr>
<tr>
<td>In target population</td>
<td>2,817</td>
<td></td>
</tr>
<tr>
<td>Permission for mail survey</td>
<td>1,988</td>
<td>71%</td>
</tr>
<tr>
<td>Returned survey</td>
<td>1,175</td>
<td>59%</td>
</tr>
</tbody>
</table>
Alaska Hwy Visitor Survey - Age profile

- Under 35 yrs
- 35 to 54 yrs
- 55 to 64 yrs
- 65 yrs & over

Canada
- Under 35 yrs: 36%
- 35 to 54 yrs: 28%
- 55 to 64 yrs: 21%
- 65 yrs & over: 20%

United States
- Under 35 yrs: 28%
- 35 to 54 yrs: 32%
- 55 to 64 yrs: 27%
- 65 yrs & over: 27%

Overseas
- Under 35 yrs: 31%
- 35 to 54 yrs: 27%
- 55 to 64 yrs: 27%
- 65 yrs & over: 20%
## Alaska Hwy Visitor Survey - Main destination

<table>
<thead>
<tr>
<th>Origin</th>
<th>Alaska</th>
<th>NE BC</th>
<th>Yukon</th>
<th>Circle</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Canada</strong></td>
<td>20%</td>
<td>27%</td>
<td>24%</td>
<td>17%</td>
</tr>
<tr>
<td>BC, AB, YT</td>
<td>14%</td>
<td>32%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Long haul</td>
<td>37%</td>
<td>12%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td><strong>United States</strong></td>
<td><strong>76%</strong></td>
<td><strong>2%</strong></td>
<td><strong>1%</strong></td>
<td><strong>6%</strong></td>
</tr>
<tr>
<td>Alaska</td>
<td>31%</td>
<td>2%</td>
<td>0%</td>
<td>11%</td>
</tr>
<tr>
<td>Lower 48 states</td>
<td>88%</td>
<td>2%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Overseas</strong></td>
<td>40%</td>
<td>8%</td>
<td>11%</td>
<td>31%</td>
</tr>
</tbody>
</table>
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**
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
<table>
<thead>
<tr>
<th>Importance in decision to take the trip</th>
<th>Very important + important</th>
</tr>
</thead>
<tbody>
<tr>
<td>See wildlife and wild landscapes</td>
<td>92%</td>
</tr>
<tr>
<td>Visit places we'd never seen before</td>
<td>87%</td>
</tr>
<tr>
<td>A journey we heard about and always wanted to make</td>
<td>76%</td>
</tr>
<tr>
<td>Enjoy outdoor activities</td>
<td>71%</td>
</tr>
<tr>
<td>Travel in places where we feel safe</td>
<td>69%</td>
</tr>
<tr>
<td>Learn about the history of the Alaska Highway</td>
<td>54%</td>
</tr>
<tr>
<td>Learn about the local way of life by meeting local people</td>
<td>54%</td>
</tr>
<tr>
<td>Better understand First Nations or aboriginal culture</td>
<td>34%</td>
</tr>
</tbody>
</table>
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
## Alaska Hwy Visitor Survey - Info for planning

<table>
<thead>
<tr>
<th>All sources</th>
<th>Canada</th>
<th>United States</th>
<th>Overseas</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet</td>
<td>35%</td>
<td>46%</td>
<td>60%</td>
<td>42%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>34%</td>
<td>34%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>The Milepost</td>
<td>12%</td>
<td>55%</td>
<td>9%</td>
<td>31%</td>
</tr>
<tr>
<td>Past experience</td>
<td>36%</td>
<td>28%</td>
<td>16%</td>
<td>31%</td>
</tr>
<tr>
<td>Visitor Info Centres</td>
<td>28%</td>
<td>22%</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Agents</td>
<td>20%</td>
<td>18%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Books</td>
<td>14%</td>
<td>21%</td>
<td>41%</td>
<td>19%</td>
</tr>
<tr>
<td>Brochures</td>
<td>17%</td>
<td>18%</td>
<td>13%</td>
<td>17%</td>
</tr>
</tbody>
</table>
## Alaska Hwy Visitor Survey - Info while traveling

<table>
<thead>
<tr>
<th>All sources</th>
<th>Canada</th>
<th>United States</th>
<th>Overseas</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIC counselors</td>
<td>72%</td>
<td>68%</td>
<td>86%</td>
<td>71%</td>
</tr>
<tr>
<td>The <em>Milepost</em></td>
<td>47%</td>
<td>89%</td>
<td>32%</td>
<td>64%</td>
</tr>
<tr>
<td>Brochures</td>
<td>61%</td>
<td>64%</td>
<td>78%</td>
<td>63%</td>
</tr>
<tr>
<td>Past experience</td>
<td>63%</td>
<td>57%</td>
<td>49%</td>
<td>59%</td>
</tr>
<tr>
<td>Advice from locals</td>
<td>52%</td>
<td>61%</td>
<td>56%</td>
<td>56%</td>
</tr>
<tr>
<td>Advice from travelers</td>
<td>50%</td>
<td>59%</td>
<td>43%</td>
<td>53%</td>
</tr>
<tr>
<td>Internet</td>
<td>40%</td>
<td>41%</td>
<td>54%</td>
<td>42%</td>
</tr>
<tr>
<td>Books</td>
<td>30%</td>
<td>41%</td>
<td>72%</td>
<td>38%</td>
</tr>
</tbody>
</table>
Alaska Hwy Visitor Survey - Most useful info

<table>
<thead>
<tr>
<th>Source</th>
<th>Canada</th>
<th>United States</th>
<th>Overseas</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <em>Milepost</em></td>
<td>26%</td>
<td>71%</td>
<td>22%</td>
<td>45%</td>
</tr>
<tr>
<td>VIC counselors</td>
<td>23%</td>
<td>4%</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>Past experience</td>
<td>17%</td>
<td>9%</td>
<td>12%</td>
<td>14%</td>
</tr>
<tr>
<td>AAA guides</td>
<td>7%</td>
<td>4%</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Advice from travelers</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Other sources</td>
<td>5%</td>
<td>2%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Internet</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Books</td>
<td>2%</td>
<td>2%</td>
<td>16%</td>
<td>3%</td>
</tr>
<tr>
<td>Advice from locals</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Thank You!! - For more information

Richard Porges
Director, Research Services
Tourism British Columbia
(250) 356-9936
Richard.Porges@tourismbc.com

Website = www.tourismbc.com/research
Commercial Nature Based Tourism
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
1. Developed Definition

2. Developed Database

3. Collected Information from/about Nature-Based Tourism Businesses
   - Surveys
   - Financial Statements
   - Secondary Data (WCB)

4. Data Analysis

5. Report on Economic Impact

6. Report on Sector Characteristics
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
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
### CNBT - Findings: Sector Characteristics

<table>
<thead>
<tr>
<th>Saltwater Based</th>
<th>38%</th>
<th>Land Based (Lodge)</th>
<th>18%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boat Charters (<em>most SW</em>)</td>
<td>14%</td>
<td>Guide Outfitters</td>
<td>11%</td>
</tr>
<tr>
<td>SW Fishing Lodges</td>
<td>6%</td>
<td>Destination Lodges</td>
<td>4%</td>
</tr>
<tr>
<td>SW (Ocean) Kayaking</td>
<td>6%</td>
<td>Guest Ranches</td>
<td>3%</td>
</tr>
<tr>
<td>Sail Cruising</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SW Fishing (No Lodge)</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scuba Diving</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marine Wildlife Viewing</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pocket Cruising</td>
<td>&lt;1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Land Based (Winter &amp; Summer)</th>
<th>27%</th>
<th>Freshwater Based</th>
<th>17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land-Based Summer</td>
<td>19%</td>
<td>FW Fishing Lodges</td>
<td>7%</td>
</tr>
<tr>
<td>Land-Based Winter</td>
<td>5%</td>
<td>FW Fishing (No Lodge)</td>
<td>5%</td>
</tr>
<tr>
<td>Mountain Biking</td>
<td>2%</td>
<td>River Rafting</td>
<td>4%</td>
</tr>
<tr>
<td>Heli-Skiing</td>
<td>1%</td>
<td>FW Kayaking/Canoeing</td>
<td>2%</td>
</tr>
</tbody>
</table>
CNBT - Findings: Sector Characteristics

Percent of Commercial Nature-Based Tourism Businesses by Tourism Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vancouver Island</td>
<td>28.5%</td>
</tr>
<tr>
<td>Vancouver, Coast &amp; Mountains</td>
<td>27.3%</td>
</tr>
<tr>
<td>Northern BC</td>
<td>18.2%</td>
</tr>
<tr>
<td>Thompson Okanagan</td>
<td>13.1%</td>
</tr>
<tr>
<td>Kootenay Rockies</td>
<td>12.6%</td>
</tr>
<tr>
<td>Cariboo Chilcotin Coast</td>
<td>8.3%</td>
</tr>
</tbody>
</table>

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
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
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
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
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