Canadian Tourism Commission
Commission canadienne du tourisme

2012 China Ski Study
Survey Research Report

April 2012

Canada

Government of Alberta

British Columbia Canada
Tourism BC

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Executive Summary

- The purpose of this research study was to obtain a better understanding of China's ski market and its potential for Canada, British Columbia, and Alberta.

- The research was conducted in two phases. While phase one involved a review of the secondary data available on the Chinese ski market, this report presents findings from in person intercept interviews conducted at three Chinese ski resorts: Yabuli, Beijing Huaibei, and Beijing Nanshan during February 4-13, 2012. Quotas were set for three different skier/snowboarder groups as follows:

    - **High Interest:** Travelled overseas to ski/snowboard in the past three years (n=150).

    - **Medium Interest:** Ski/snowboard at least twice per year and have travelled long-haul for a general vacation *(but not necessarily to ski/snowboard)* in the past three years (n=150).

    - **Low Interest:** ski/snowboard at least twice per year and have not travelled abroad to ski/snowboard in the past three years (n=200).

- Skiers/snowboarders in the Low and Medium Interest groups are predominantly male but are more evenly split in the High Interest group. The High Interest skiers, who are more likely to travel overseas for a ski vacation, tend to be in a higher income bracket and are more likely to have a university education, which fits the profile of the affluent Chinese travellers.

- High Interest skiers/snowboarders most likely visited Japan and Switzerland on their last ski trip, followed by Korea and Canada. On ski trips taken in the past 3 years, Canada fares much better placing second behind only Japan.

- While it is increasingly common for Chinese vacationers to include skiing or snowboarding as part of their vacation, dedicated ski/snowboard vacations are not common. The High Interest group tends to average about 2 days spent skiing/snowboarding on trips that average just under 10 days in duration.

- Half of the High Interest skiers purchased travel packages with airfare, ski passes, and accommodations the most likely components purchased. Low and Medium Interest groups are less likely to want a complete package but the components sought are similar to the High Interest group with a higher percentage wanting to have ski rentals included in the package.

- Skiers are most likely to seek information from word of mouth, travel TV shows, destination websites, and travel magazines. Travel agents are widely popular with all skiers although Internet travel suppliers (e.g. ctrip.com) are growing in demand as a means to book a ski trip.

- Good snow conditions are the obvious first choice for what a skier looks for when planning a ski/snowboard trip. Affordability was the next most mentioned as a first choice for characteristics sought when planning a trip to ski or snowboard. While skiing/snowboarding is the most popular activity on a ski trip, sampling local flavours and taking in city and winter activities are also sought out.

- Canada places third behind Japan and Switzerland in unaided and aided awareness as a country for skiing and snowboarding with very little awareness and knowledge about specific ski destinations. The lack of knowledge about specific ski destinations was the top barrier that can be addressed by marketing ski/snowboard destinations. Chinese skiers and snowboarders are also discouraged from travelling outside of China to ski or snowboard because of time commitments, personal reasons, and the cost of travelling overseas.

- Realistically, this translates into about 5%[1] of the High Interest group and less than 5% of the Low and Medium Interest groups saying they would definitely travel to Canada in the next 2 years to ski or snowboard.

[1] *Due to the nature of the convenience sample (i.e. predetermined quota for interviews at selected ski resorts) used for this project, the percentages provide insights into the potential of the Chinese outbound ski market but should not be applied to calculate the overall outbound ski market size from China. Deriving quantitative measures is outside of the scope of this study.*

Chapter 1 – Introduction

Introduction

Outbound travel from China has risen meteorically over the last few years, fuelled by rapid economic growth, a rising middle class, less restrictive travel policies, and a desire to see how the other half lives. Buoyed by a healthier economy and pent-up demand, Chinese travellers are ramping up their long-haul vacations, taking more frequent trips, seeking out vacation spots that are further afield, and moving toward independent travel. Aided by the boost of receiving ADS and increased direct air capacity, Chinese overnight visits to Canada surged by over 20% in 2010, followed by another 20% in the first half of 2011. In recognizing the opportunity that China represents, the CTC is dedicating additional resources in order to begin more comprehensive promotional activities in this market.

By all outward appearances, the ski industry in China has exploded in recent years. According to figures from the Chinese Ski Association, the number of skiers in China grew from 10,000 to around a reported 5 million between 1996 and the end of 2010, while the number of ski facilities bloomed from nine to nearly 200. Over this 15-year time span, skiing has evolved from a niche activity, enjoyed by a dedicated few, to a full-blown industry replete with competitive-grade ski runs, state-of-the-art equipment, luxury hotels, high-end condo developments, and western-style après-ski activities.

With China anticipated to be one of the fastest growing tourism markets in the world, it would greatly benefit Canada/British Columbia/Alberta to gain some firsthand knowledge on this market. A joint research partnership has been established between Tourism British Columbia (part of British Columbia Ministry of Jobs, Tourism and Innovation), Alberta Tourism, Parks and Recreation (on behalf of Travel Alberta) and the Canadian Tourism Commission to commission a study of the China ski market and the potential of attracting Chinese skiers to Canada/British Columbia/Alberta for a ski vacation.

To this end, a research study has been conducted with the overall objective to obtain a better understanding of China's ski market and its potential for Canada, British Columbia and Alberta.

Methodology

This study was conducted in two parts: Desk Research and In-person Surveys.

Desk Research:

The purpose of the desk research and literature scan was to secure, review and analyse relevant research to gain a thorough understanding on current and emerging trends which are shaping and influencing tourism product development, tourism travel patterns, and leisure time patterns for the Chinese ski industry. Relevant literature (market profiles, articles and research reports) from various sources such as the CTC, the Chinese Ski Association, other government organizations, and the Internet was accessed in order to complete the desk research.

The following types of information were collected:

- Travel patterns and trends among Chinese skiers, for example, destinations visited, trends in resort travel, other activities participated in, motivations, etc.;
- Information on the growth of the ski travel market in China, both domestic and outbound;
- Estimates on the size and potential of China's ski market;

- External factors and conditions that might affect the industry; and
- Characteristics of the ski industry in China, such as the number of ski/resort facilities, plans for expansion, and the names of the key players in the industry.

This first phase of the research is reported in a separate report.

In-person Surveys:

The second phase of the research involved completing a total of 500 in-person interviews with skiers at three Chinese ski resorts: Yabuli, Beijing Huaibei, and Beijing Nanshan. Data was collected during the period of February 4-13, 2012. See Exhibit 1.1 for locations of Beijing area ski resorts and Exhibit 1.2 for the location of the Yabuli Ski resort. Quotas were set for the following three groups:

1. **High Interest Skiers/Snowboarders:** Travelled overseas to ski/snowboard in the past three years (n = 150).
2. **Medium Interest Skiers/Snowboarders:** Ski/snowboard at least twice per year and have travelled long-haul for a general vacation *(but not necessarily to ski/snowboard)* in the past three years (n = 150).
3. **Low Interest Skiers/Snowboarders:** ski/snowboard at least twice per year and have not travelled abroad to ski/snowboard in the past three years (n = 200).

The objectives of the in-person interviews were to:

- Assess the potential of China's ski market;
- Investigate China's domestic and outbound ski/snowboard trends;
- Determine Chinese skier/snowboarder characteristics and their ski/snowboard vacation preferences;
- Explore potential ski/snowboard product packaging and purchase channels;
- Understand ski-related affiliations and media consumption; and
- Determine awareness and attractiveness of Canada/BC/Alberta as a ski/snowboard destination among Chinese skiers and snowboarders.

Due to the nature of the convenience sample (i.e. predetermined quota for interviews at selected ski resorts) used for this project, the study results provide insights into the potential of the Chinese outbound ski market but should not be applied to calculate the overall outbound ski market size from China. Deriving quantitative measures is outside of the scope of this study.

Exhibit 1.1. Beijing Area Ski Resorts

Exhibit 1.2. North-East China Ski Resorts

Chapter 2 – Profile of Skiers and Demographics

Profile of Skiers

Local residents are undoubtedly the largest markets for the three resorts. Nearly all skiers at the Huaibei (99%) and the Nanshan (92%) Ski Resorts were from Beijing. The great majority of skiers (89%) at the Yabuli Ski Resort were from within Heilongjiang Province (Exhibit 2.1).

Across all three interest groups, the reported incidence of skiing only twice this season (2011/2012) is higher than that of last season (2010/2011), while the incidence of skiing three or more times is somewhat lower, particularly for the High Interest group (at 35% vs. 50%). Although this would indicate that skiers are skiing less frequently this season, it is important to note that the data was collected early in the current ski season (Exhibit 2.2).

Of the various ski clubs that respondents reported to be members of, the Penguin (37%), Xuefeng (22%) and Beijing Huaibei International (18%) Ski Clubs were the most frequently cited (Exhibit 2.3).

Exhibit 2.1. Home City / Province

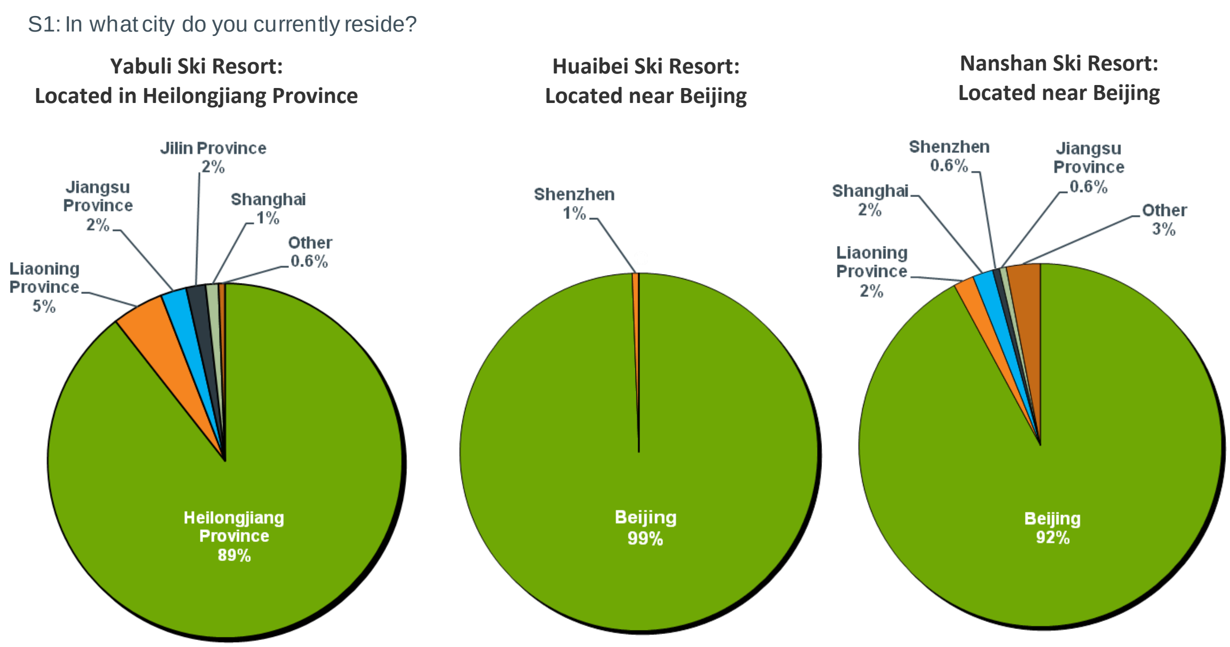
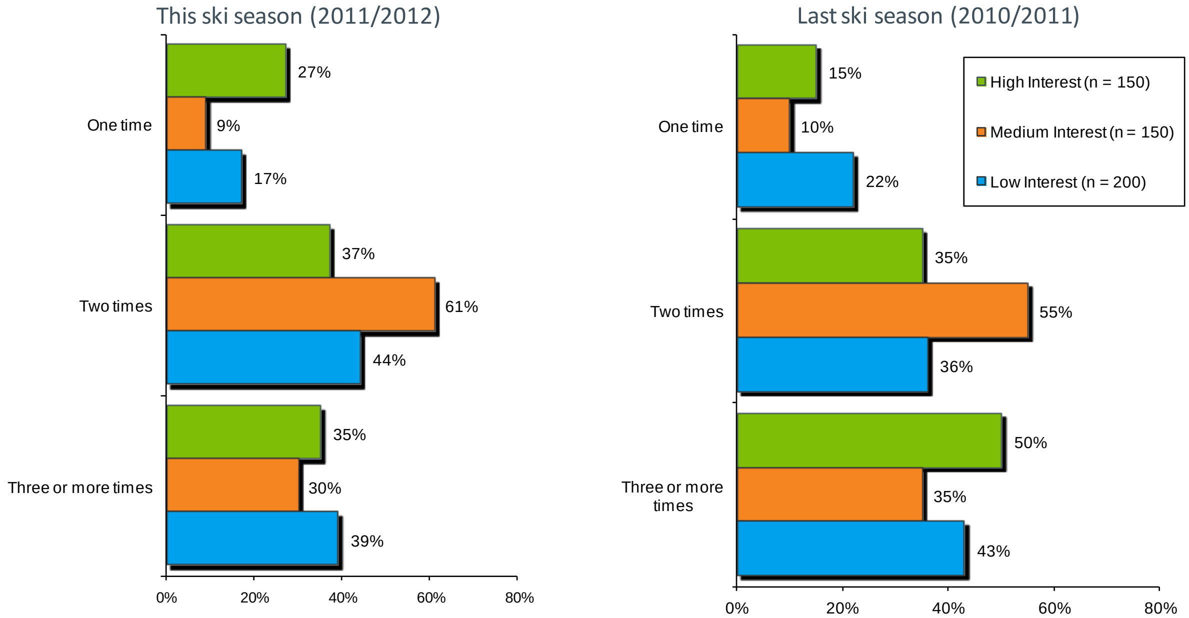


Exhibit 2.2. Skiing Frequency

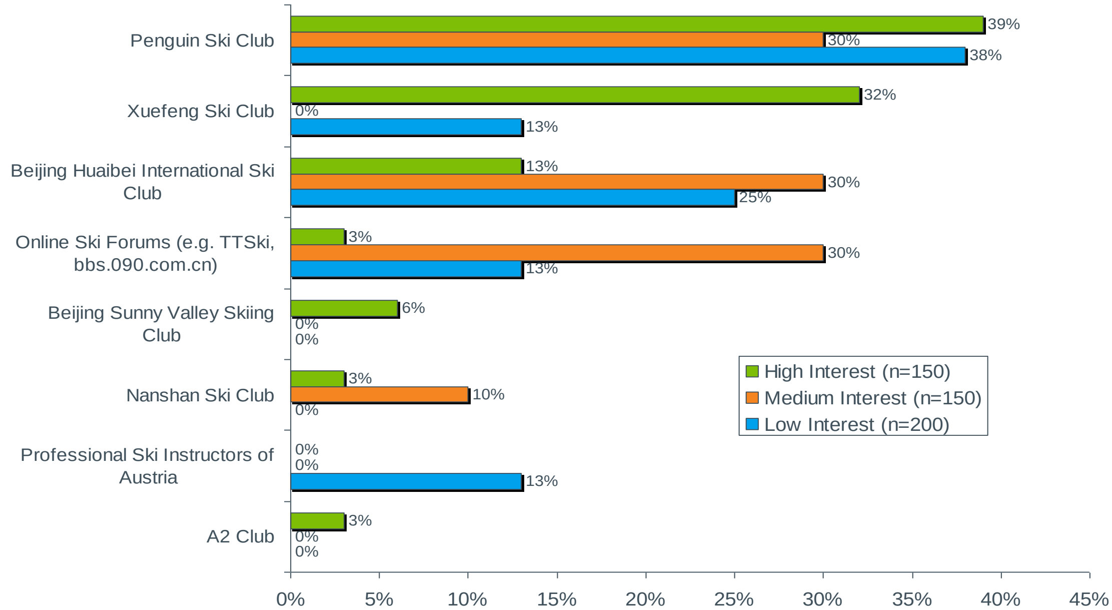
S7/A1a: How many times did you ski or snowboard **THIS ski season** (i.e., November 2011 to present)?
S8/A1b: How many times did you ski or snowboard **LAST ski season** (i.e., November 2010 to March 2011)?



Base: All Respondents (n=500)

Exhibit 2.3. Ski Club Membership

E2. Are you a member of a ski club or association?



Base: All Respondents (n=500)

Demographics/Profile

The male/female ratio at each of the ski resorts is generally 55/45, with the exception of the Beijing Nanshan Ski Resort which skews toward male (62%). The High Interest group is more evenly split on gender while the Low and Medium Interest groups skew more male.

The majority of skiers are under 35 years of age with 6 in 10 skiers at Huaibei (60%) and Yabuli (56%) in this age group. Slightly more, or 8 in 10 were under 35 years of age at the Nanshan ski resort. Clearly, the infancy of the ski industry in China is reflected in the younger age of its patrons. The Low Interest group is more likely than the Medium and High Interest groups to be in this younger age cohort.

It follows that the High and Medium Interest skiers tend to earn higher incomes than the Low Interest group, providing them with the means to travel outside of China. Nearly half of the Low Interest skiers earned below 10,000 RMB (~$1,600 CAD) per month. Furthermore, the majority of skiers at the Yabuli Ski Resort also earn less than 10,000 RMB monthly, likely due to the difference in income per capita between Beijing and the Heilongjiang Province.

Skiers are generally well educated, with more than half of each group being university educated and another one in four having earned a college degree. Among the ski resorts, younger, married, university educated respondents tend to be drawn more towards the Beijing Nanshan ski resort (80%) (Exhibit 2.4/2.5).

Exhibit 2.4. Respondent Demographics by Ski Resort

		Yabuli Ski Resort (n = 170)	Beijing Huaibei Ski Resort (n = 165)	Beijing Nanshan Ski Resort (n = 165)
Age	18-24	21%	22%	30%
	25-34	35%	38%	54%
	35-54	41%	36%	15%
	55+	4%	3%	1%
Gender	Male	55%	55%	62%
	Female	45%	45%	38%
Marital Status	Single	69%	58%	38%
	Married / Common law	31%	41%	61%
	Other	0%	1%	0%
Children in Household	Yes	46%	32%	25%
	No	54%	68%	75%
Household Income	Below 10,000 RMB (~$1,600 CAD)	56%	23%	15%
Per Month	10,000 to 19,999 RMB (~$1,600 to ~$3,200 CAD)	40%	42%	56%
	20,000 RMB or above (~$3,200+ CAD)	4%	35%	29%
Education	Up to High School	9%	21%	5%
	Technical / Vocational Training	2%	5%	1%
	College	35%	23%	15%
	University	48%	38%	64%
	Post Graduate or above	5%	13%	16%

Exhibit 2.5. Respondent Demographics by Skier Type

		High Interest (n = 150)	Medium Interest (n = 150)	Low Interest (n = 200)
Age	18-24	23%	28%	23%
	25-34	40%	36%	49%
	35-54	34%	35%	26%
	55+	3%	1%	3%
Gender	Male	51%	59%	61%
	Female	49%	41%	40%
Marital Status	Single	58%	57%	51%
	Married / Common law	41%	43%	48%
	Other	1%	0%	0%
Children in Household	Yes	41%	36%	29%
	No	59%	64%	72%
Household Income	Below 10,000 RMB (~$1,600 CAD)	20%	21%	49%
Per Month	10,000 to 19,999 RMB (~$1,600 to ~$3,200 CAD)	50%	53%	37%
	20,000 RMB or above (~$3,200+ CAD)	30%	26%	14%
Education	Up to High School	7%	13%	15%
	Technical / Vocational Training	1%	4%	2%
	College	25%	25%	23%
	University	52%	49%	49%
	Post Graduate or above	14%	9%	12%

The High Interest is more likely to be serious skiers/snowboarders - 16% are advanced or expert level skiers, 50% have skied three or more times last year, and 21% have ski club memberships. The Low and Medium Interest groups are more likely to be beginner or intermediate level skiers/snowboarders with a majority of both groups skiing/snowboarding two times or less last ski season (Exhibit 2.6).

Exhibit 2.6. Respondent Profile – Ski Characteristics

		High Interest (n = 150)	Medium Interest (n = 150)	Low Interest (n = 200)
Ski / Snowboard	One time	27%	9%	17%
This Season	Two times	37%	61%	44%
	Three or more times	35%	30%	39%
Ski / Snowboard	One time	15%	10%	22%
Last Season	Two times	35%	55%	36%
	Three or more times	50%	35%	43%
Ski Level	**Just started**	-	3%	4%
	Beginner (learning to manuever, control speed and stop, snowplow turns)	31%	55%	47%
	Intermediate (comfortably ski and/or snowboard on intermediate terrain)	52%	43%	49%
	Advanced (can confidently ski and/or snowboard on all kinds of terrain)	15%	-	1%
	Expert (ski/snowboard instructor, professional skier/snowboarder etc.)	1%	-	-
Ski Club Member	Yes	21%	7%	4%
	No	79%	93%	96%

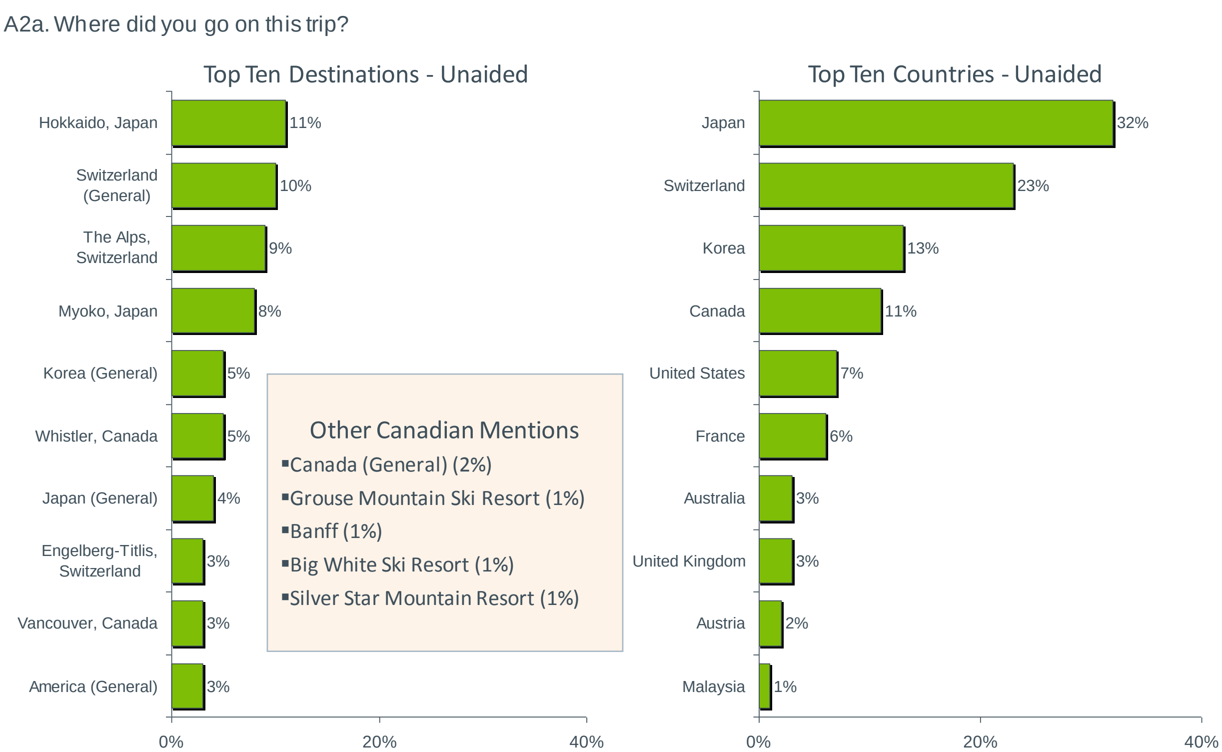
Chapter 3 – Ski / Snowboard Trip Profiles

Destinations, Cost, Satisfaction, and Value for Money: High Interest Skiers – Past Trip

On an unaided basis, Japan (32%) was by far the most visited ski destination as indicated by respondents, followed by Switzerland (23%), Korea (13%) and Canada (11%). In terms of Canadian destinations, only Whistler (5%) and Vancouver (3%) were mentioned among the top 10 most visited destinations. Surprisingly, the USA was only mentioned by 7% with no significant mentions of any specific ski destination registering in the top ten (Exhibit 3.1).

The ski destination where skiers/snowboarders stayed the longest reflected the general patterns of their last trip with Japan and Switzerland appearing at the top and Canada in a distant fourth (Exhibit 3.2). Destinations for other ski trips taken in the past three years show Canada tied in second spot with Switzerland behind Japan and ahead of Korea. This would indicate that currently Switzerland may be a little more desirable as a location for skiing and snowboarding as Chinese skiers seek out new places to ski (Exhibit 3.3).

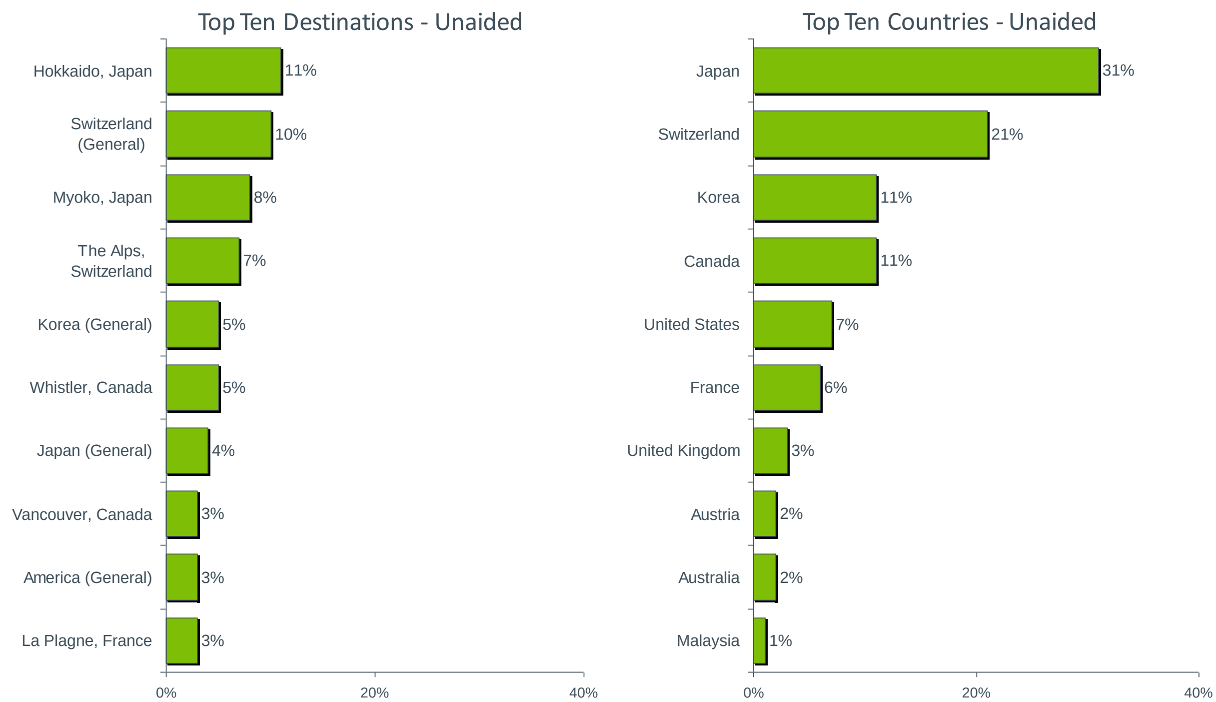
Exhibit 3.1. Ski Destinations Visited by High Interest Skiers (All)



Base: High Interest Skiers (n=150)

Exhibit 3.2. Ski Destinations Visited by High Interest Skiers (Longest Stay)

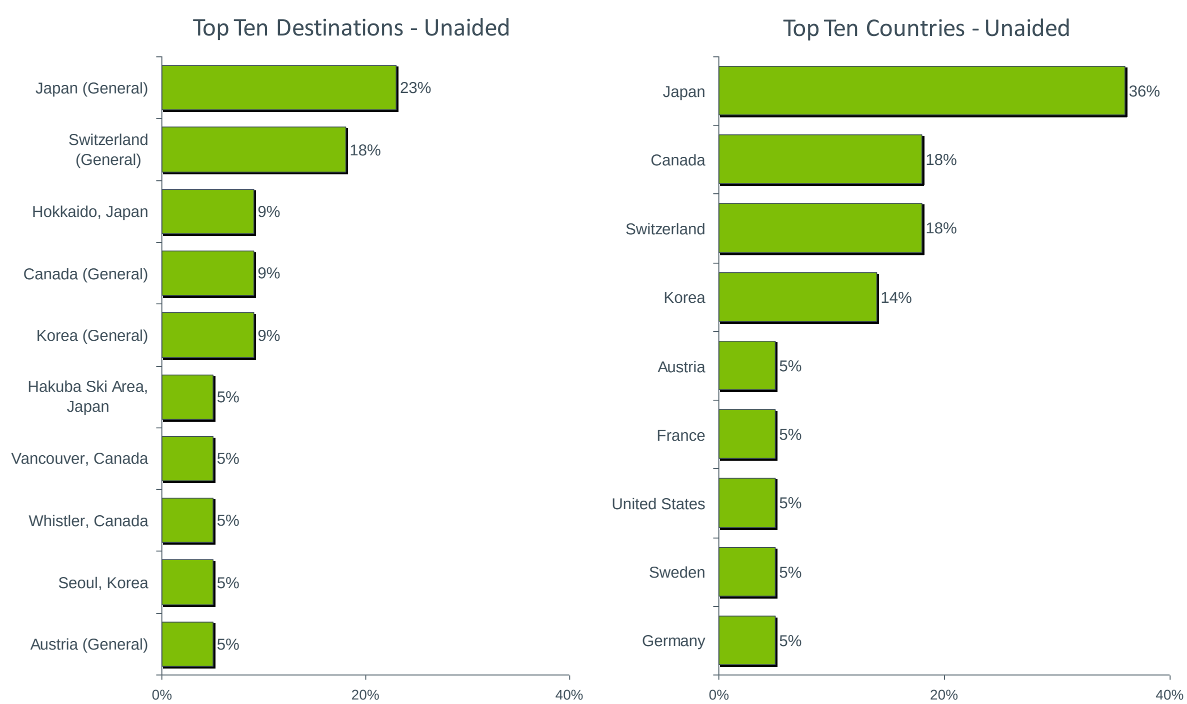
A2b. Where did you stay the longest?



Base: High Interest Skiers (n=150)

Exhibit 3.3. Other Previous Trips – Destinations

A16. Thinking about the other holiday trips **outside of China** you have taken in the **past three years** where you skied or snowboarded at least once, where did you go on these trips?

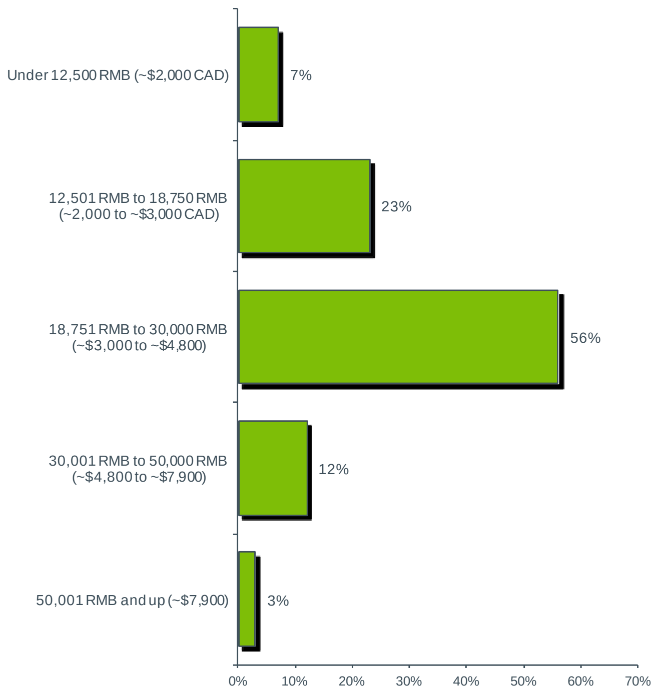


Base: High Interest Skiers (n=150)

Just over half (56%) of the ski trips cost between 18,751 RMB and 30,000 RMB while just under a third (30%) were less than this amount (Exhibit 3.4). When looking at the costs for trips to the top four countries (i.e. Japan, Switzerland, Korea and Canada) those reporting a trip to Canada (n=17) tended to spend more, on average, per person. Spending on a trip to Canada tended to average closer to the high end of the 18,751 RMB to 30,000 RMB category (29,800 RMB) while spending on a trip to the other countries tended to average closer to the lower end of that category (i.e. 22,000 RMB to 23,000 RMB).

Exhibit 3.4. Trip Cost Per Person

A11. Approximately what was the total amount spent on that trip?



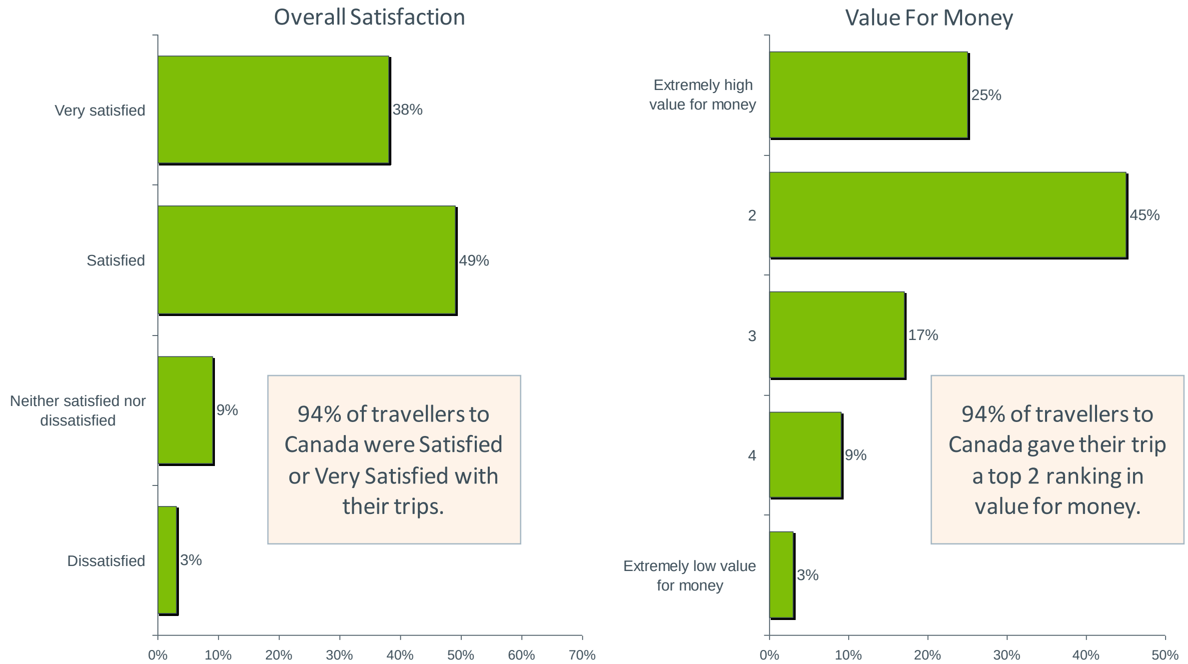
Base: High Interest Skiers (n=150).

The vast majority of the High Interest group (87%) were satisfied, including almost four in 10 who were very satisfied with their last ski trip. Slightly more (94%) were completely satisfied with their past trip to Canada. Similarly, the vast majority (70% gave a 1 or 2 rating on a scale of 1-5) were pleased with the monetary value that they received from their most recent overseas ski trip while more than 9 in 10 travellers gave Canada a similar rating.

This may indicate that although Canada may be falling slightly out of favour as a destination (i.e. it was more likely to be a destination visited in the past three years than on the last trip), those who visited Canada gave it a higher rating for satisfaction and monetary value than visitors gave other destinations they visited (Exhibit 3.5). This is certainly good news in light of the fact that spending per trip is slightly higher on trips to Canada than to the other top three ski/snowboard destinations.

Exhibit 3.5. Previous Ski Trip Destinations – Satisfaction / Value for Money

A11. Overall, how satisfied or dissatisfied were you with this ski trip?
A12. How would you rate this trip in terms of value for money?



Base: High Interest Skiers (n=150)

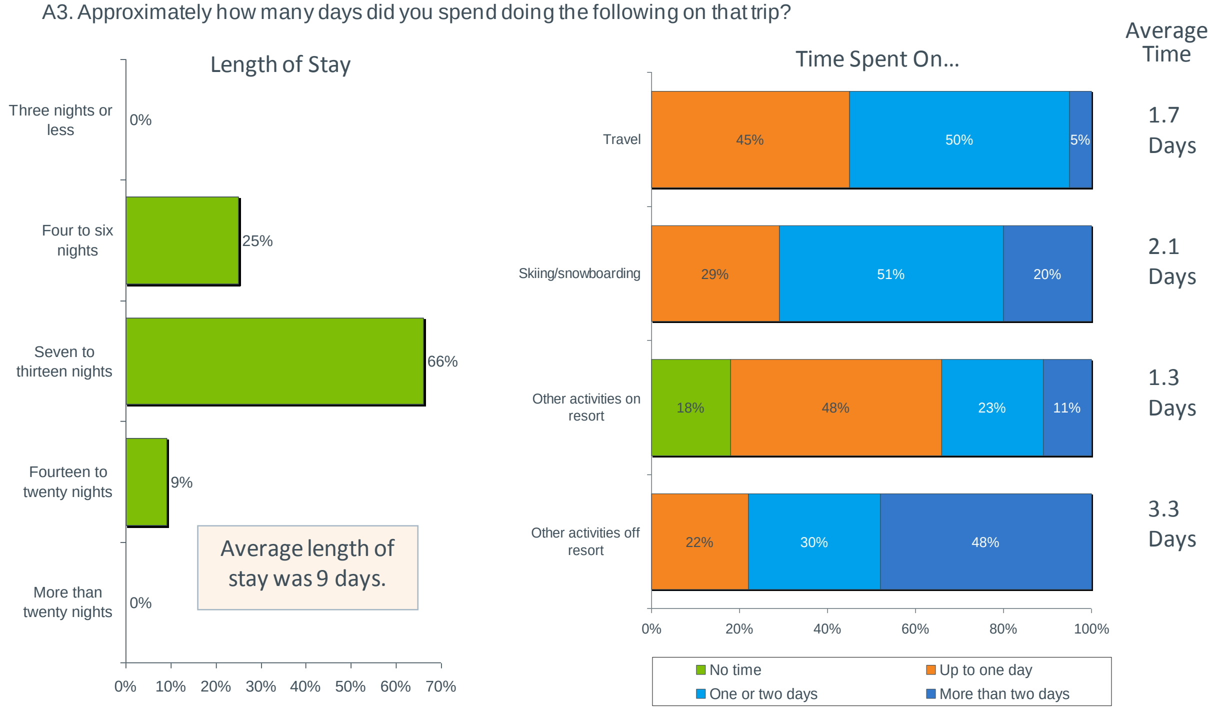
Trip Characteristics

The majority (80%) of High Interest skiers spent less than two days skiing on their most recent overseas ski/snowboard trip, despite mostly having gone on a trip for more than six nights (75%). This appears to indicate that skiing is not necessarily the lone driver for taking a ski trip overseas, as supported by previous research (China Ski Study 2012 - Desk Research). Among the activities listed, time spent on other activities outside of the ski resort had the highest incidence (48%) of more than two days.

As for time spent within the ski resorts, the primary reason for visiting a ski resort was to ski/snowboard. Only a third (34%) of High Interest skiers spent more than a day doing other activities on the resort (Exhibit 3.6).

Exhibit 3.6. Ski Trip Itinerary – High Interest Group

A2c. On this trip, how many nights, in total, were you away from home?
A3. Approximately how many days did you spend doing the following on that trip?



Base: High Interest Skiers (n=150)

Medium and Low Interest groups were asked about the characteristics and types of activities and experiences they are looking for in an ideal overseas (i.e. outside China) ski/snowboard vacation. These two groups were more likely to want a shorter trip between two to six nights (53% for the Low Interest groups and 47% for the Medium Interest group). The large majority would want to spend at least some time at a ski resort but, not more than one or two nights. Of those wanting to stay at a resort, eight in ten (79%) of the Medium Interest group and just over five in ten (55%) of the Low Interest group want to spend only one or two nights at the resort.

The amount of time they would like to spend skiing/snowboarding is one to three days (86% for the Low Interest groups and 78% for the Medium Interest group) (Exhibit3.7).

Travel arrangements for ideal trips among the Medium and Low Interest groups tend to reflect the previous trip taken by those in the High Interest group. In particular, approximately one in five travel with one other person, two in five travel with 2-3 other people, while a further two in five travel with more than 4 others. These travel companions are most likely to be friends or a spouse/significant other (Exhibit3.8).

Exhibit 3.7. Trip Characteristics by Skier Type

		High Interest[1] (n = 150)	Medium Interest (n = 150)	Low Interest (n = 200)
Length of Trip	Two to three nights	0%	7%	13%
	Four to six nights	25%	40%	40%
	Seven to thirteen nights	66%	39%	35%
	Fourteen to twenty nights	9%	8%	9%
	Twenty-one nights or more	0%	3%	2%
Plan to Stay at Ski Resort	Yes, for entire trip	N/A	13%	23%
	Yes, for part of trip	N/A	59%	64%
	No	N/A	24%	11%
Length of Resort Stay[2]	One night	N/A	26%	19%
	Two nights	N/A	43%	36%
	Three or four nights	N/A	23%	33%
	Five nights or more	N/A	8%	12%
Days Spent Skiing/Snowboarding	One day	N/A	32%	19%
	Two to three days	N/A	54%	59%
	Four to six days	N/A	4%	15%
	Seven to thirteen days	N/A	1%	4%
	Fourteen to twenty days	N/A	2%	2%
	Twenty-one days or more	N/A	1%	0%

[1] Results based on previous ski trip.

[2] Base: Those who said they would stay at a ski resort for part of their trip.

Exhibit 3.8. Trip Profiles by Skier Type – Travel Arrangements

		High Interest[1] (n = 150)	Medium Interest (n = 150)	Low Interest (n = 200)
Size of travel group	One	5%	1%	1%
	Two	17%	21%	19%
	Three or four	38%	41%	42%
	Five to ten	33%	36%	37%
	More than ten	8%	1%	2%
Travel Companion	Friends	49%	57%	63%
	Wife/husband/girlfriend/boyfriend	25%	59%	57%
	Child	7%	23%	15%
	Father/mother	11%	13%	16%
	Organized group/club	13%	5%	6%
	Other relatives	7%	5%	9%
	Business associates	11%	1%	2%
	Travelling alone	5%	1%	1%
Accommodation type	Mid-priced hotel / motel	48%	45%	57%
	Luxury hotel / resort	28%	26%	22%
	Home of friends or relatives	13%	11%	4%
	Country Inn / bed and breakfast	5%	6%	7%
	Youth hostel / university accommodation	1%	7%	6%
	Second home / timeshare	1%	2%	3%
	Rented condo/ cottage / lodge	3%	2%	2%
	Campground or trailer park	0%	0%	1%

Base: All respondents (n = 500).

[1] Results based on previous trip.

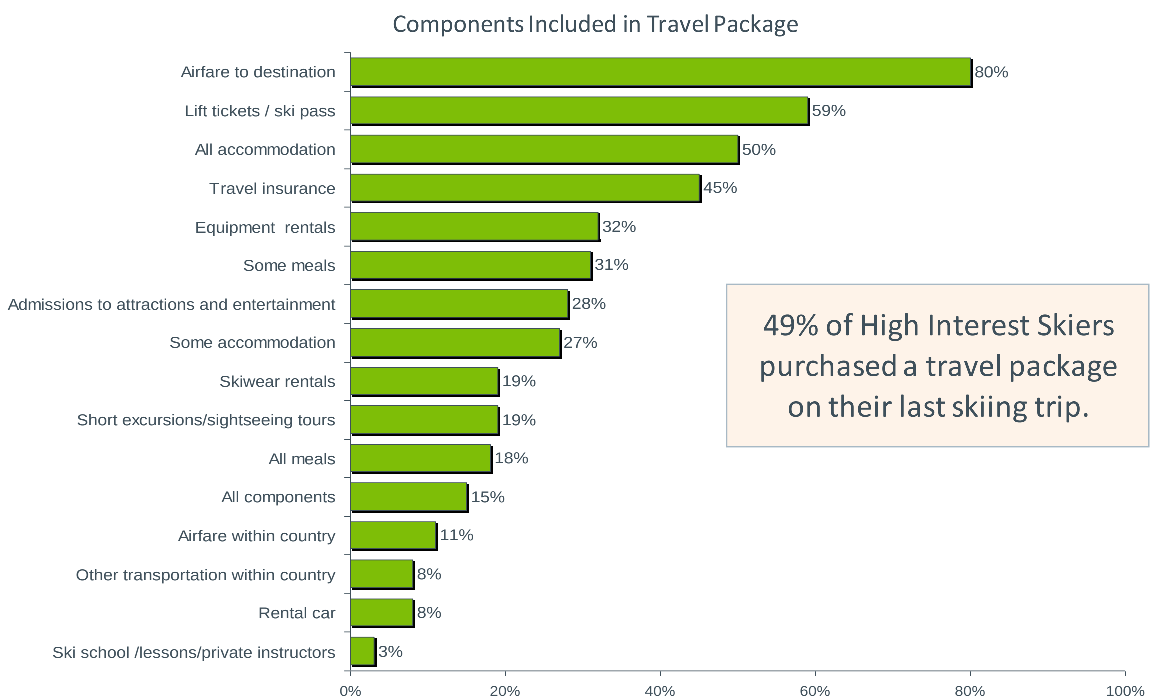
Travel Packages

Travel packages were purchased by half of the High Interest skiers on a past trip (49%). Moreover, about a third (32%) of Medium Interest skiers and less than half (44%) of the Low Interest skiers indicated they would likely purchase a travel package for a ski/snowboard vacation in the future.

The most commonly cited components of the travel packages purchased by the High Interest group were airfare (80%), lift tickets/ski pass (59%), and full accommodations (50%). Low and Medium Interest groups are less likely to want a complete package but the components sought are similar with a higher percentage wanting to have ski rentals included in the package. Other travel package components cited among the top five mentions for High Interest skiers included travel insurance (45%) and equipment rentals (32%), and some meals (31%) (Exhibit 3.9/3.10).

Exhibit 3.9. Travel Packages – Previous Trips by High Interest Skiers

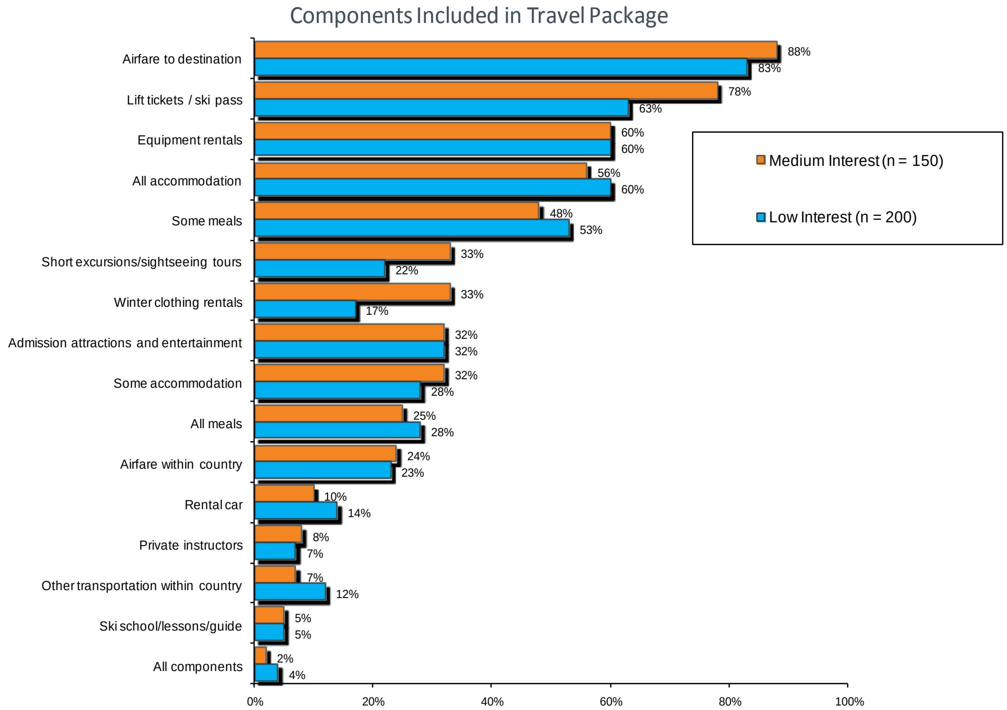
A5. Did you purchase a package that includes several components of the trip?
A6. What components were included in that package?



Base: High Interest Skiers (n=150)

Exhibit 3.10. Travel Packages – Future Trips by Medium and Low Interest Skiers

B10. How likely would you be to use a package tour or travel package for a ski/snowboard vacation?
B11. Which of the following components would you like to purchase together as a package for a ski/snowboard vacation?

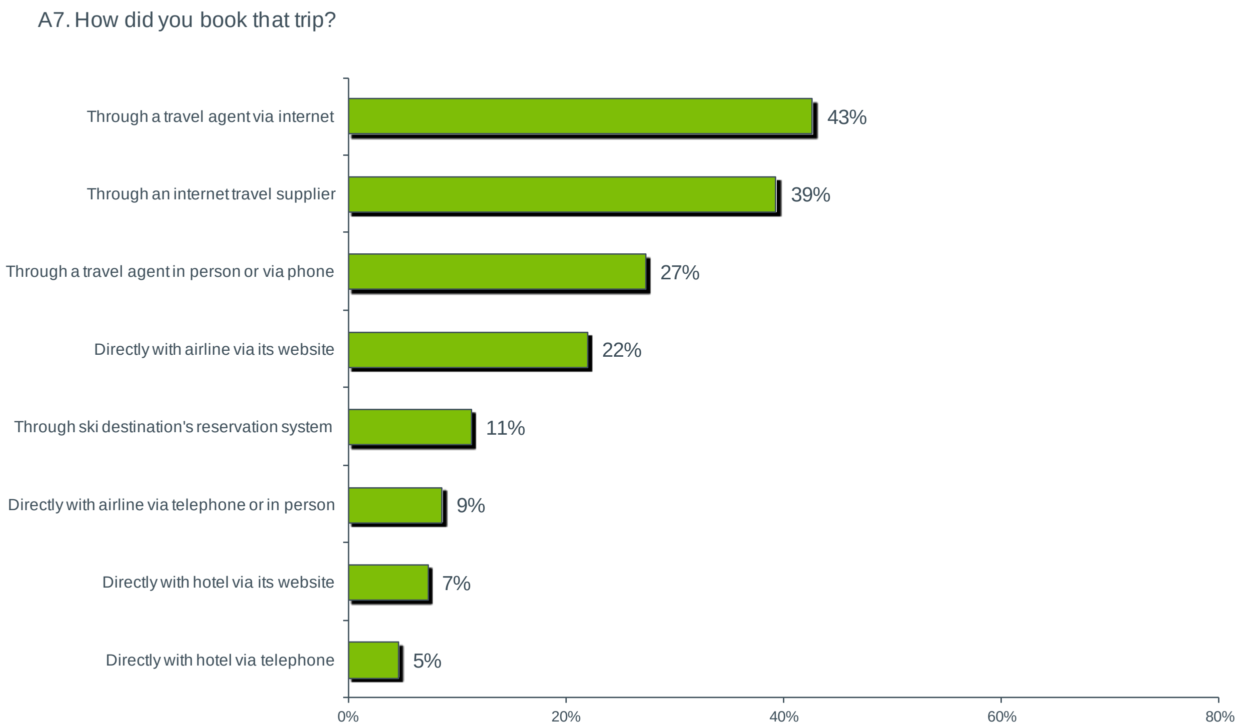


Base: Medium Interest and Low Interest Skiers (n=350)

Booking Methods

The most popular methods for booking a ski trip for the High Interest group were Internet based either through a travel agent via Internet (43%) or through an Internet travel supplier (e.g. ctrip.com) (39%). Booking with a travel agent, in person or over the phone, was somewhat less popular (27%). Booking a ski/snowboard trip though an airline website, through a ski destination's reservation system, in-person with an airline, or directly with the hotel was comparatively less popular (Exhibit 3.11).

Exhibit 3.11. Booking Methods – Previous Trips by High Interest Skiers

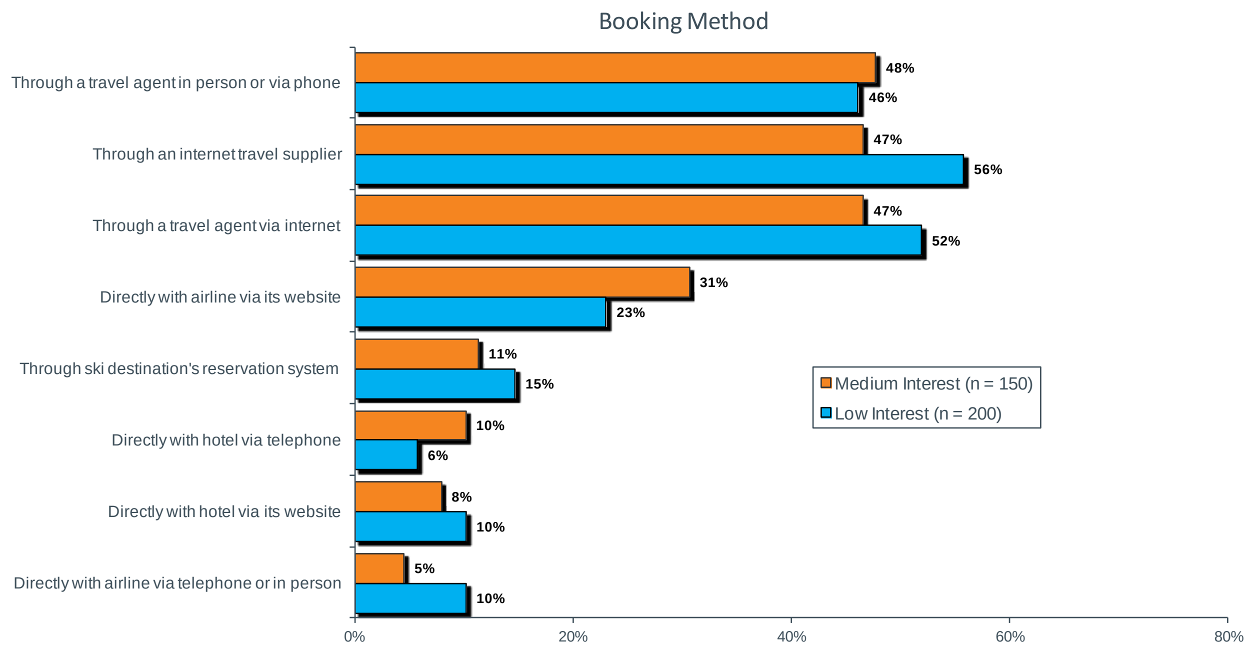


Base: High Interest Skiers (n=150)

Booking methods that Medium and Low Interest groups would use are somewhat similar with travel agents via Internet and Internet travel supplier (e.g. ctrip.com) rating very high along with the use of a travel agent either in person or over the phone (Exhibit 3.12)

Exhibit 3.12. Booking Methods – Future Trips by Medium and Low Interest Skiers

B12. When booking an overseas trip, which of the following methods would you use?



Base: Medium Interest and Low Interest Skiers (n=350)

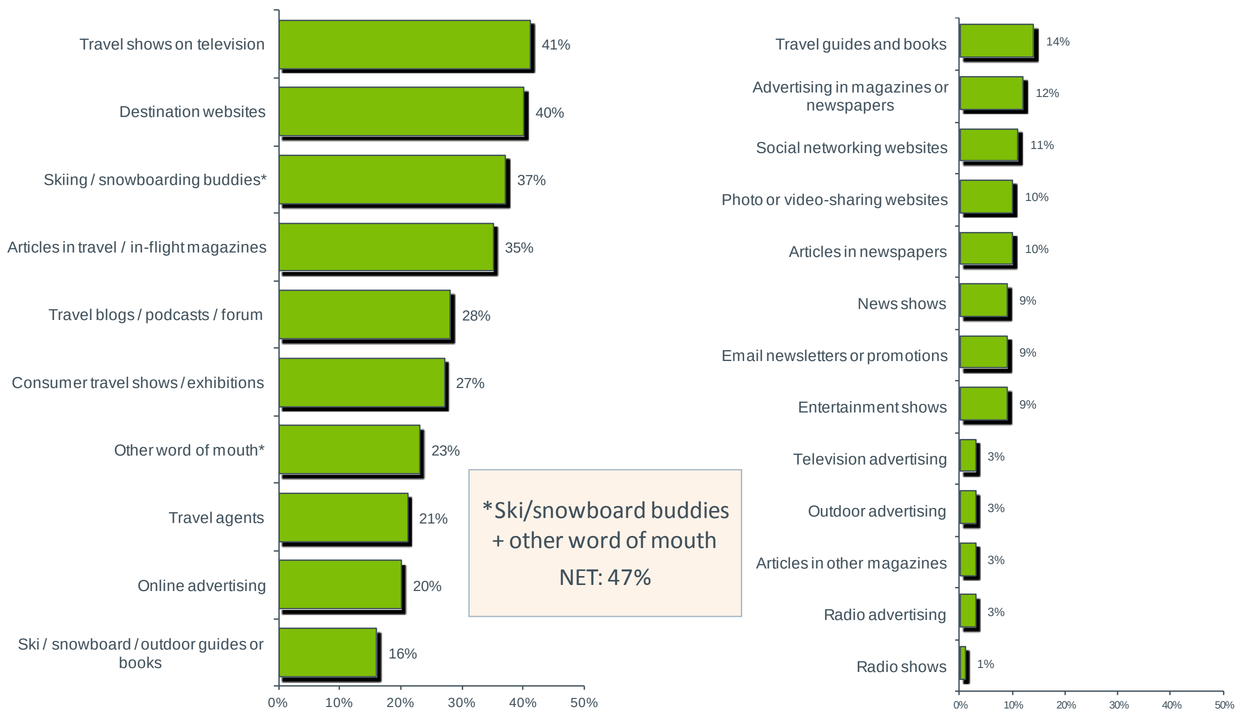
Information Sources

The most popular sources of information among High Interest skiers for their past trip included travel shows (41%), destination websites (40%), ski/snowboard peers (37%), and travel magazines (35%). First person information (i.e. ski/snowboard buddies and other word of mouth), when taken as a whole, is by far the most important reference source for planning a trip (47%) (Exhibit 3.13).

Low and Medium Interest groups use similar information sources when considering an overseas ski trip although Low Interest skiers are less influenced by their ski/snowboard buddies (22%) than the other groups (Exhibit 3.13/3.14).

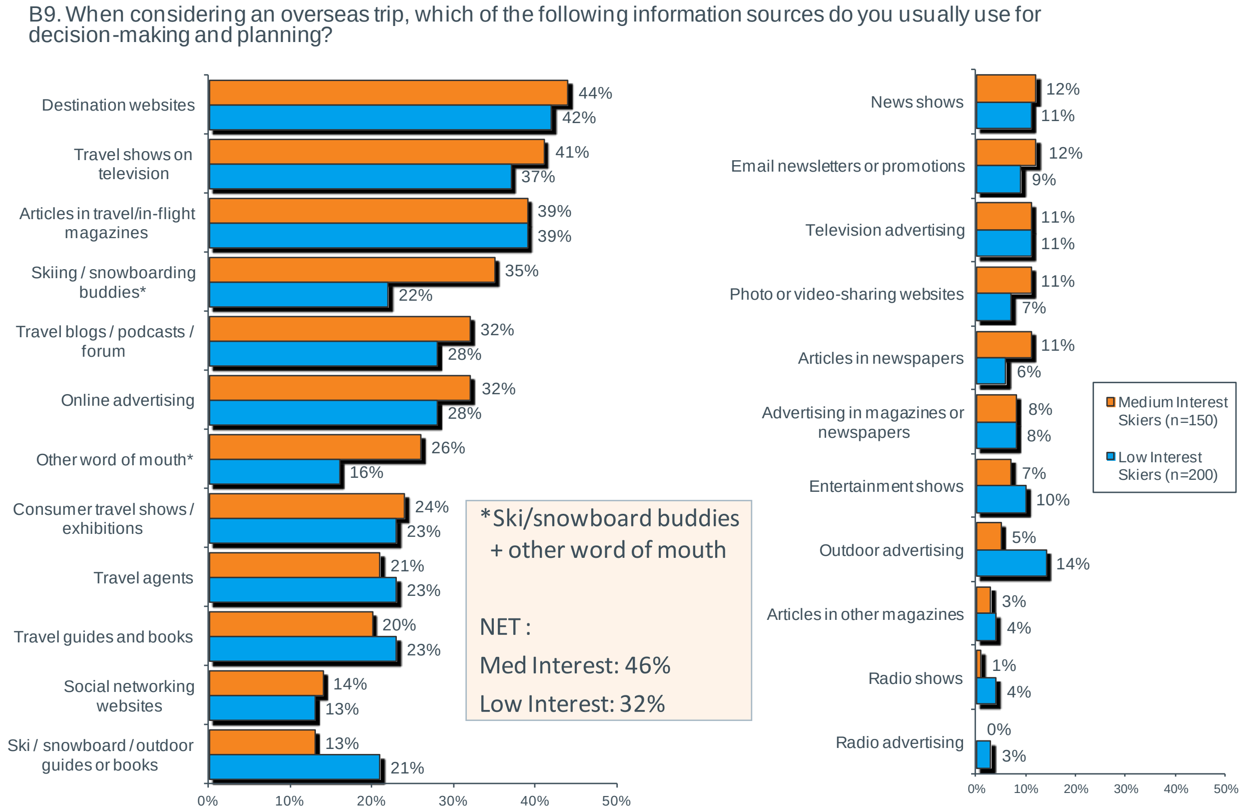
Exhibit 3.13. Information Sources for Planning Ski Trips – Previous Trips by High Interest Skiers

A13. When planning that trip, what source of information did you reference for ideas, offers and/or deals?



Base: High Interest Skiers (n=150)

Exhibit 3.14. Information Sources for Planning Ski Trips – Future Trips by Medium and Low Interest Skiers



Base: Medium Interest and Low Interest Skiers (n=350)

Preferences of Ski Trip Attributes and Activities

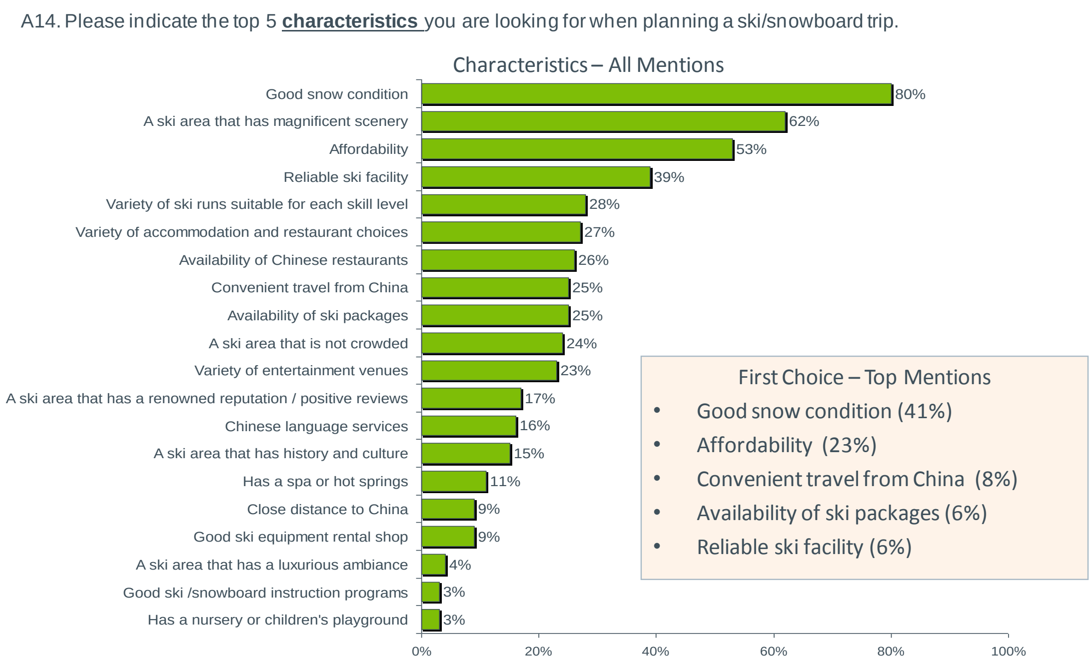
While over three quarters of all skiers/snowboarders mentioned “good snow conditions” as one of their top five choices when planning a ski/snowboard trip, surprisingly only four in ten (41%) of the High Interest group and just over three in 10 of the Low Interest (33%) and Medium Interest (35%) groups made it their top choice for planning a ski/snowboard trip. Skiers/snowboarders at the Yabuli Ski Resort were also more likely than those at the Beijing resorts to mention “good snow conditions” as a priority when planning a ski/snowboarder trip.

The “affordability” of a trip was mentioned as a first choice when planning a ski/snowboard trip by just over two in ten in all groups. As one of the top five choices, it garnered just over half of all mentions for the High Interest group (53%) and almost two-thirds (63%) of the Low and Medium Interest groups. Skiers/snowboarders at the Beijing ski resorts (who had a higher proportion of beginner level skiers/snowboarders) were more likely to mention affordability as a top choice than those at the Yabuli ski resort.

Practical considerations such as convenient travel from China, availability of ski packages, reliability ski facility were the next highest ranked for first choice when planning a ski/snowboard trip.

In terms of total mentions, a ski area that has magnificent scenery was a top five characteristic for all interest groups (i.e., ranked second at 62% for High Interest group and third for the Low and Medium Interest groups – 57% and 59%, respectively) when considering all mentions but did not gather more than five percent as a first choice across all interest groups. (Exhibit 3.15/3.16).

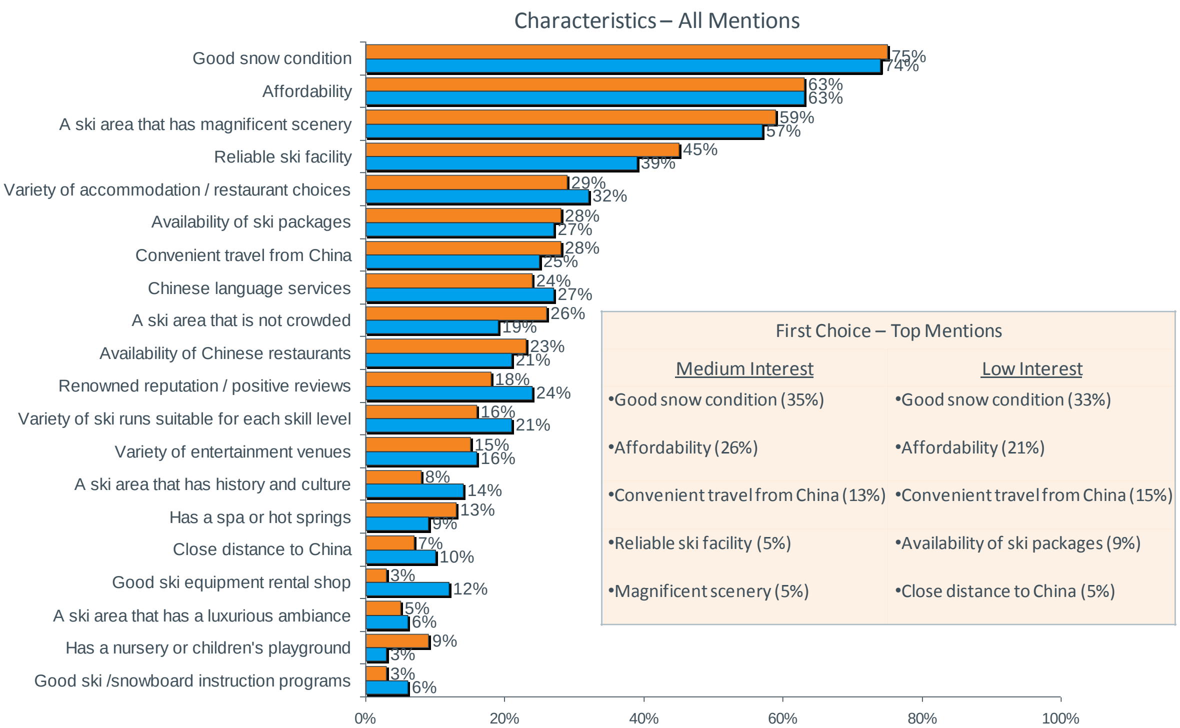
Exhibit 3.15. Previous Ski Trips – Desirable Characteristics for High Interest Skiers



Base: High Interest Skiers (n=150)

Exhibit 3.16. Future Ski Trips – Desirable Characteristics for Medium and Low Interest Skiers

B7. Please indicate the top 5 **characteristics** you are looking for when planning a ski/snowboard trip.



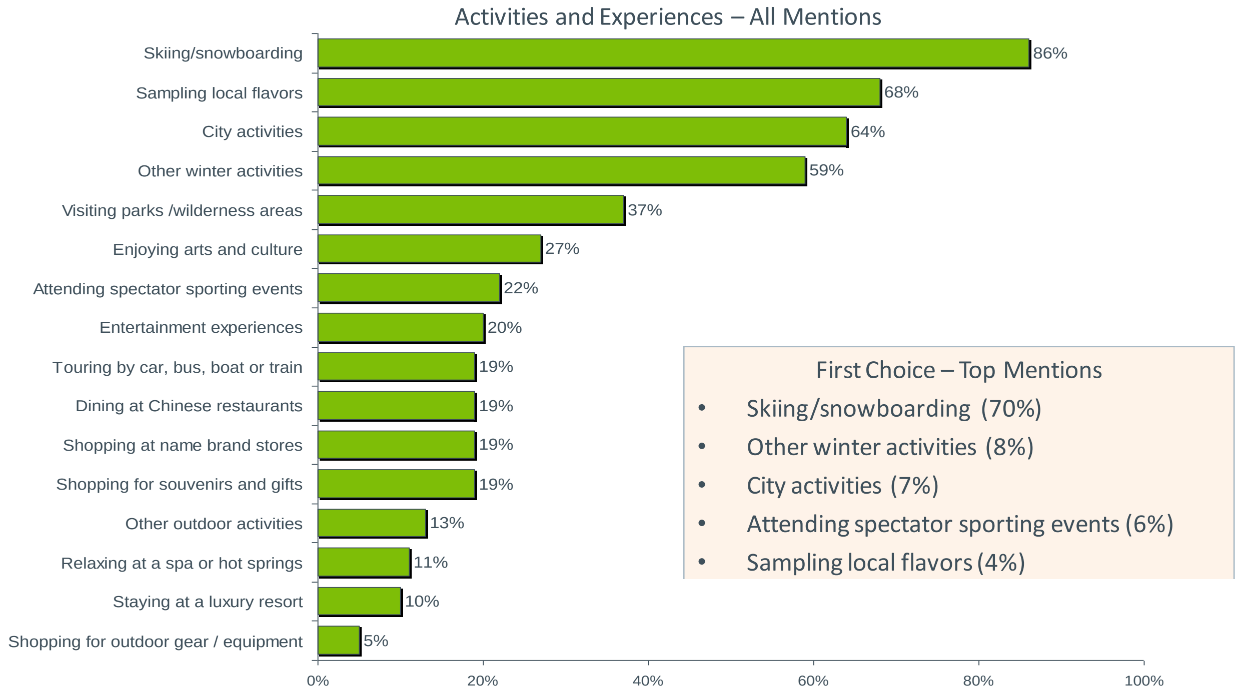
Base: Medium Interest and Low Interest Skiers (n=350)

The top five activities and experiences mentioned for ski/snowboard trips were not surprisingly, skiing/snowboarding, followed by sampling local flavours, city activities (e.g. sightseeing), other winter activities and visiting parks and wilderness areas. All Interest groups were similar in the ranking of the top five choices.

Skiing/snowboarding also sits as the first choice across all Interest groups. After this, no other activity or experience is mentioned as the top choice in any of the groups by more than ten percent of respondents (with the exception of other winter activities at 14% for the Low Interest group) (Exhibit 3.17/3.18).

Exhibit 3.17. Previous Ski Trips – Activities and Experiences

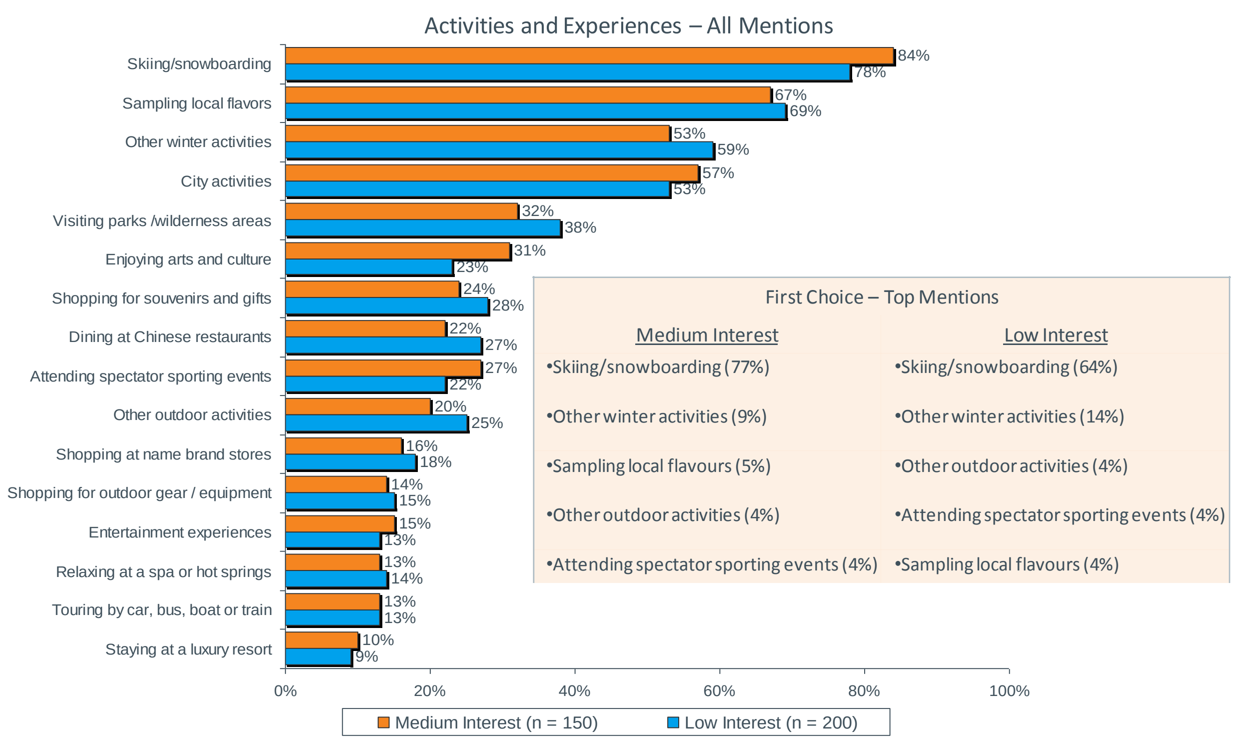
A15. Please indicate the top 5 **activities and experiences** you are looking for when planning a ski/snowboard trip.



Base: High Interest Skiers (n=150)

Exhibit 3.18. Future Ski Trips – Activities and Experiences

B8. Now, please indicate the top 5 **activities and experiences** you are looking for when planning a ski/snowboard trip.



Base: Medium Interest and Low Interest Skiers (n=350)

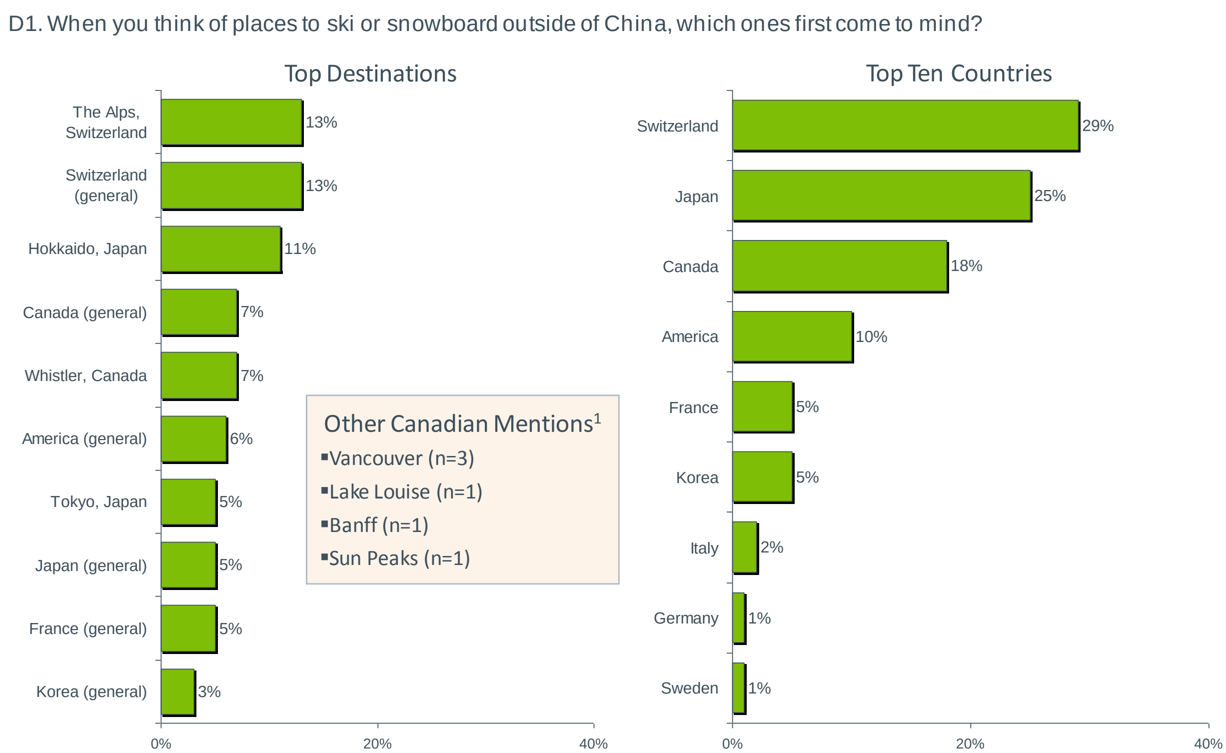
Chapter 4 – Awareness of Ski/Snowboard Destinations

Unaided Destination Awareness

In general, the top two places that come to mind for skiing/snowboarding are either Japan or Switzerland, across all three interest groups. For the High Interest group, this is a similar ranking to the unaided mentions of destinations visited on their last trip. Canada places a solid third (18%) in unaided awareness for the High Interest group despite placing behind Korea in unaided mentions of countries visited on their last trip. Canada was mentioned as a place to ski or snowboard by about one in 10 of the Low Interest (15%) and the Medium Interest groups (10%).

While it was very difficult for the Medium and Low Interest groups to come up with mentions of specific resorts to visit, Whistler (7%) was the only resort to crack the top ten destinations mentioned by the High Interest group (Exhibit 4.1/4.2/4.3).

Exhibit 4.1. Unaided Destination Awareness – High Interest Skiers

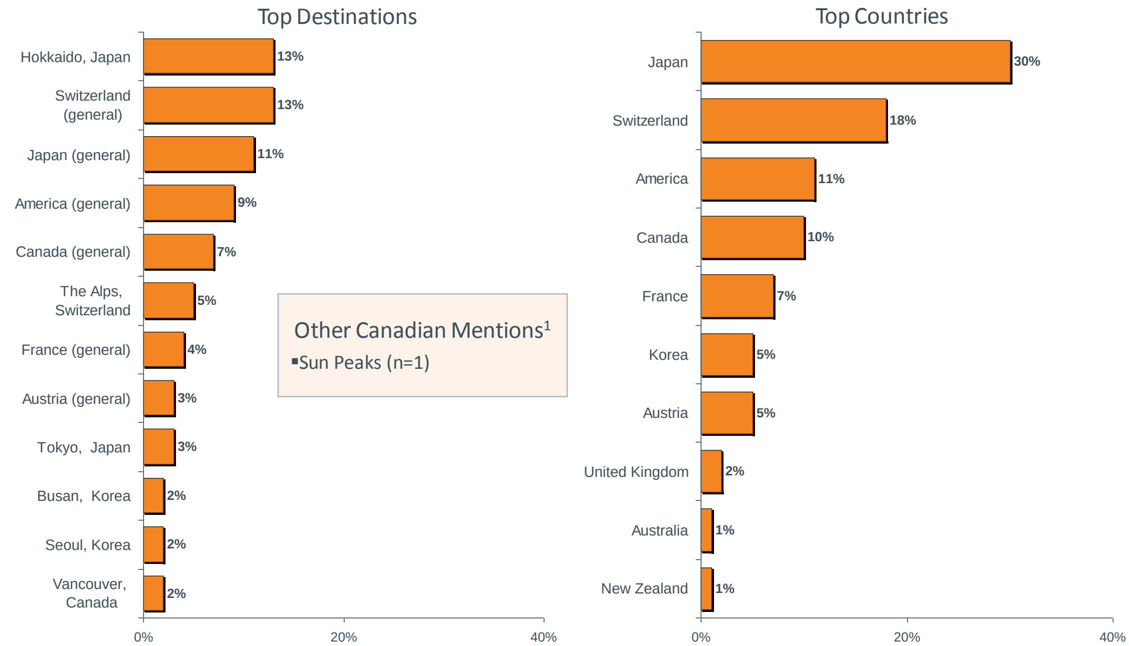


Base: High Interest Skiers (n=150)

[1] Destinations were mentioned by 1% of respondents or fewer.

Exhibit 4.2. Unaided Destination Awareness – Medium Interest Skiers

D1. When you think of places to ski or snowboard outside of China, which ones first come to mind?

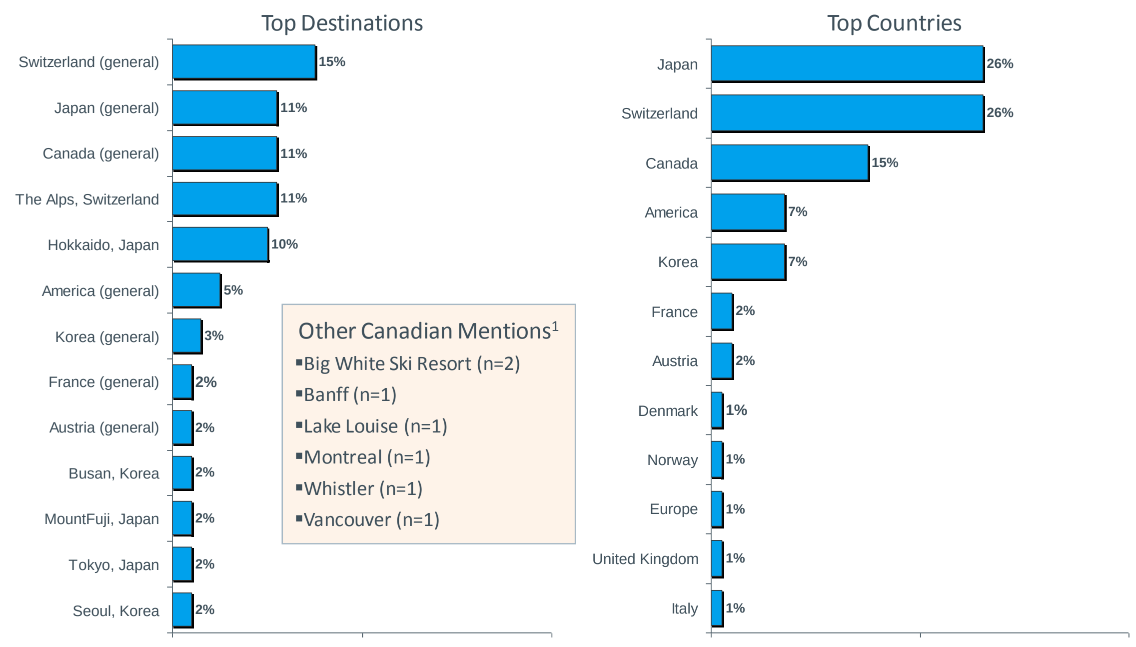


Base: Medium Interest Skiers (n=150)

[1] Destinations were mentioned by 1% of respondents or fewer.

Exhibit 4.3. Unaided Destination Awareness – Low Interest Skiers

D1. When you think of places to ski or snowboard outside of China, which ones first come to mind?



Base: Low Interest Skiers (n=200)

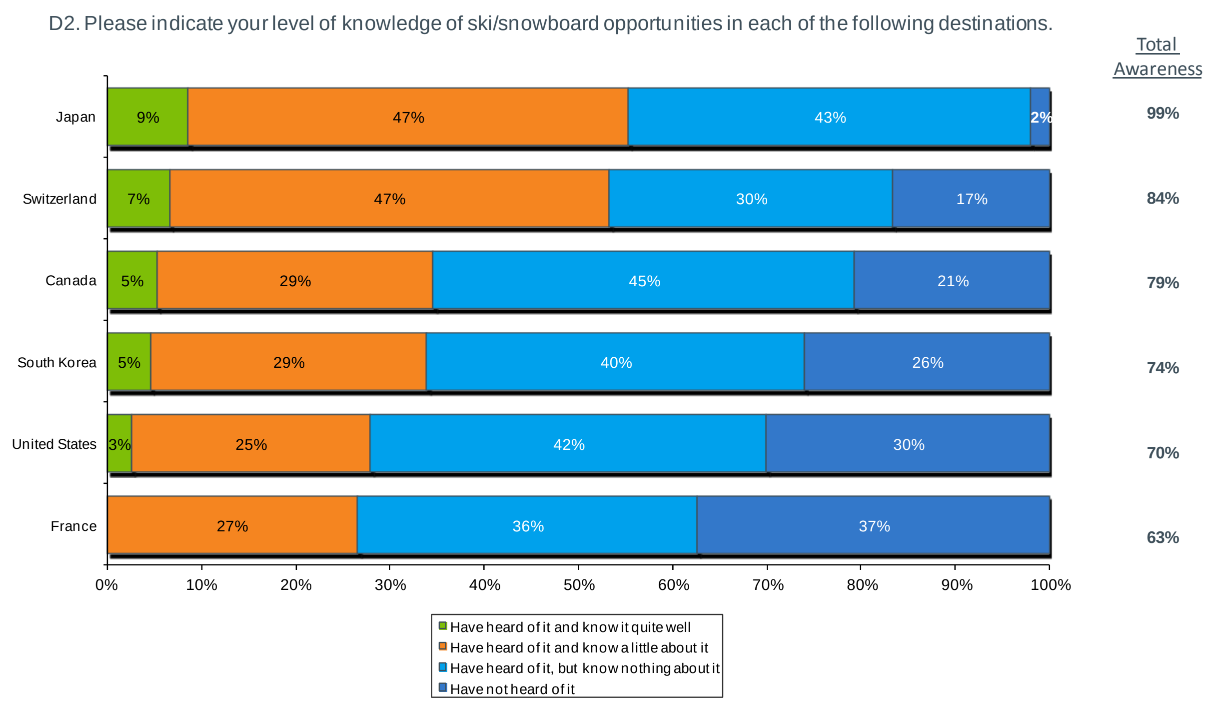
[1] Destinations were mentioned by 1% of respondents or fewer.

Aided Destination Awareness

Respondents were asked about their level of knowledge of ski/snowboard opportunities in six countries: Japan, Switzerland, Canada, South Korea, the United States, and France. In terms of total awareness (i.e. have heard of it), Canada ranks third behind Japan and Switzerland across all Interest groups.

While total awareness for Canada as a ski/snowboard destination is very high, there is a long way to go to educate skiers/snowboarders about the opportunities at specific destinations in the country. Over half of the High Interest skiers/snowboarders in Japan (56%) and Switzerland (54%) know about the ski/snowboard opportunities in these countries, while just over a third (34%) have the same levels of awareness for opportunities in Canada (Exhibit 4.4). Medium and Low Interest groups exhibit less knowledge about opportunities for skiing and snowboarding in Canada (24% and 25%, respectively) than their High Interest counterparts (Exhibit 4.5/4.6).

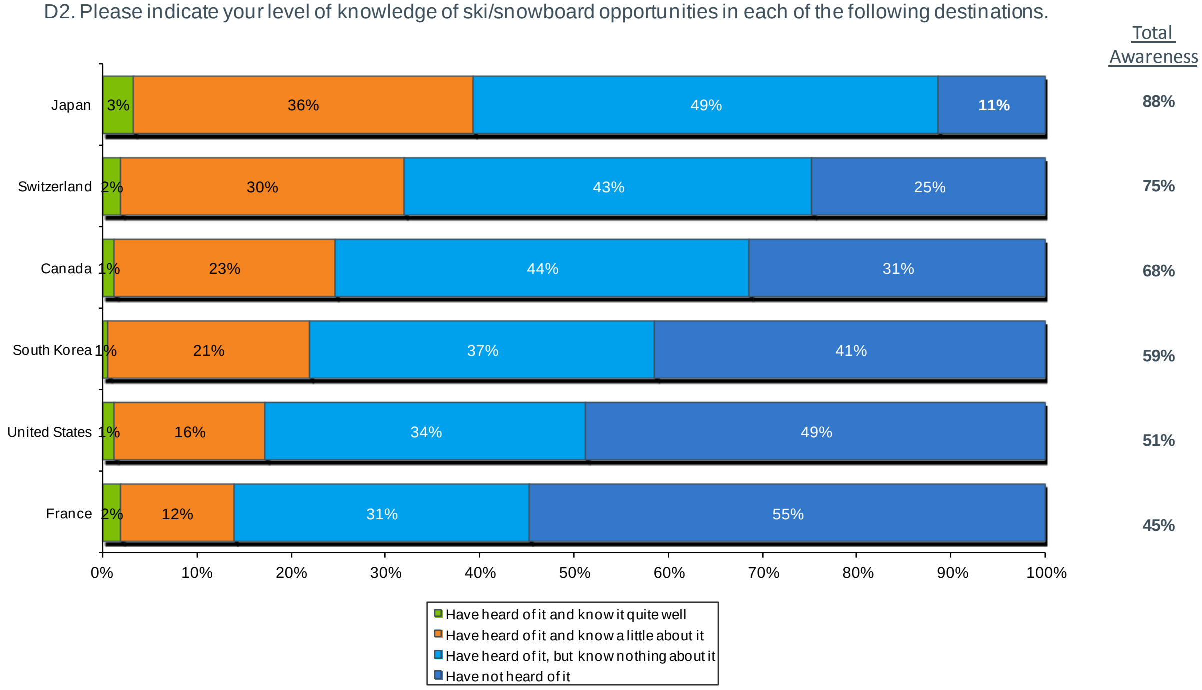
Exhibit 4.4. Aided Destination Awareness (Countries) – High Interest Skiers



Base: High Interest Skiers (n=150)

Exhibit 4.5. Aided Destination Awareness (Countries) – Medium Interest Skiers

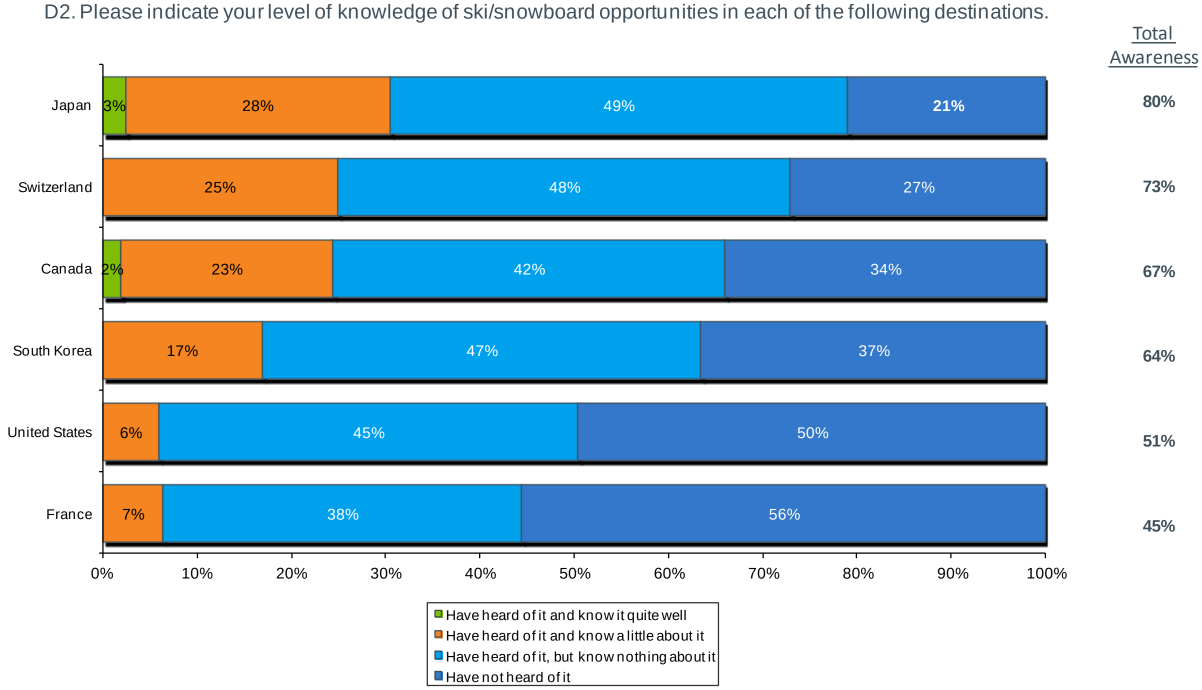
D2. Please indicate your level of knowledge of ski/snowboard opportunities in each of the following destinations.



Base: Medium Interest Skiers (n=150)

Exhibit 4.6. Aided Destination Awareness (Countries) – Low Interest Skiers

D2. Please indicate your level of knowledge of ski/snowboard opportunities in each of the following destinations.



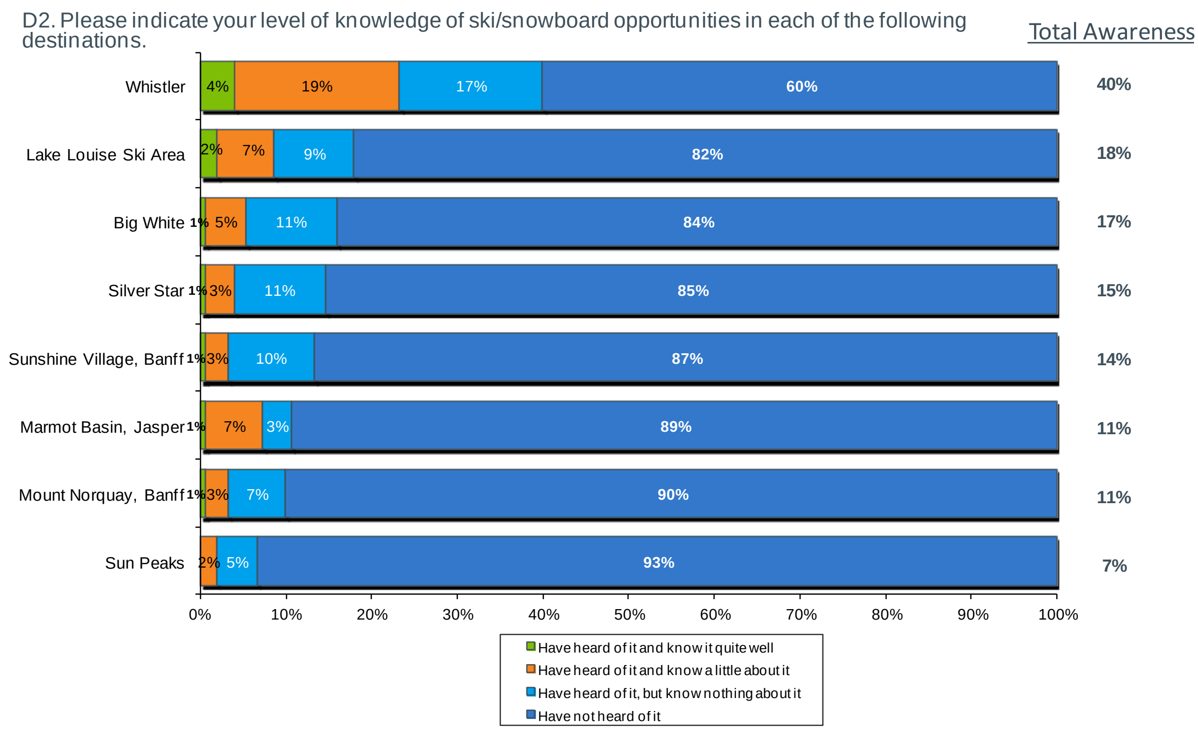
Base: Low Interest Skiers (n=200)

Aided Awareness – Canadian Ski Destinations

Respondents were also asked about their level of knowledge about a specific list of Canadian ski destinations. Whistler was by far the most recognized ski destination by about a two to one margin over the next closest destination – Lake Louise Ski Area. While just two in five (40%) High Interest skiers had heard of Whistler, just over one in five (23%) know at least a little about it. The residual effect of the 2010 Winter Olympics may be a factor in the high level of awareness for Whistler.

No other ski destination registered over 10% on the knowledge scale (i.e., have heard of it and knew about it) (Exhibit 4.7).

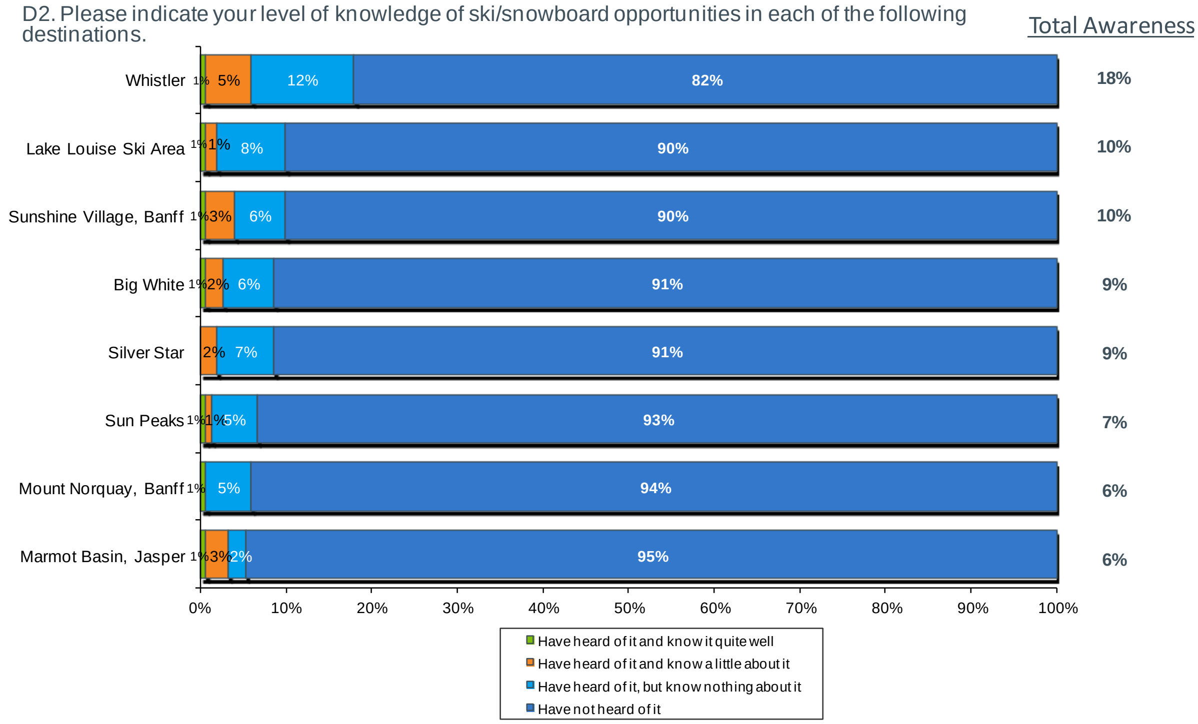
Exhibit 4.7. Aided Destination Awareness (Canadian Ski Destinations) – High Interest Skiers



Base: High Interest Skiers (n=150)

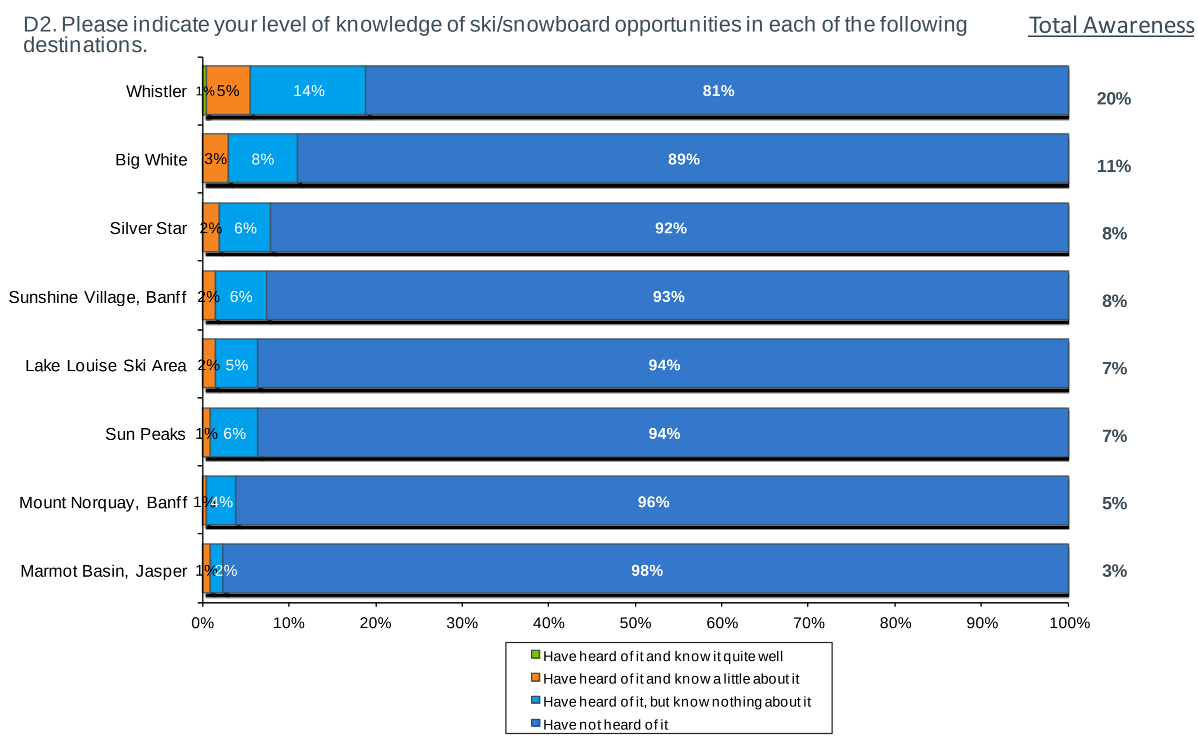
The rankings of the ski destinations on knowledge among the Low and Medium Interest groups were similar to that of the High Interest group although, total awareness scores were significantly less than that of the High Interest group (Exhibit 4.8/4.9).

Exhibit 4.8. Aided Destination Awareness (Canadian Ski Destinations) – Medium Interest Skiers



Base: Medium Interest Skiers (n=150)

Exhibit 4.9. Aided Destination Awareness (Canadian Ski Destinations) – Low Interest Skiers



Base: Low Interest Skiers (n=200)

Chapter 5 – Future Ski / Snowboard Travel Intentions

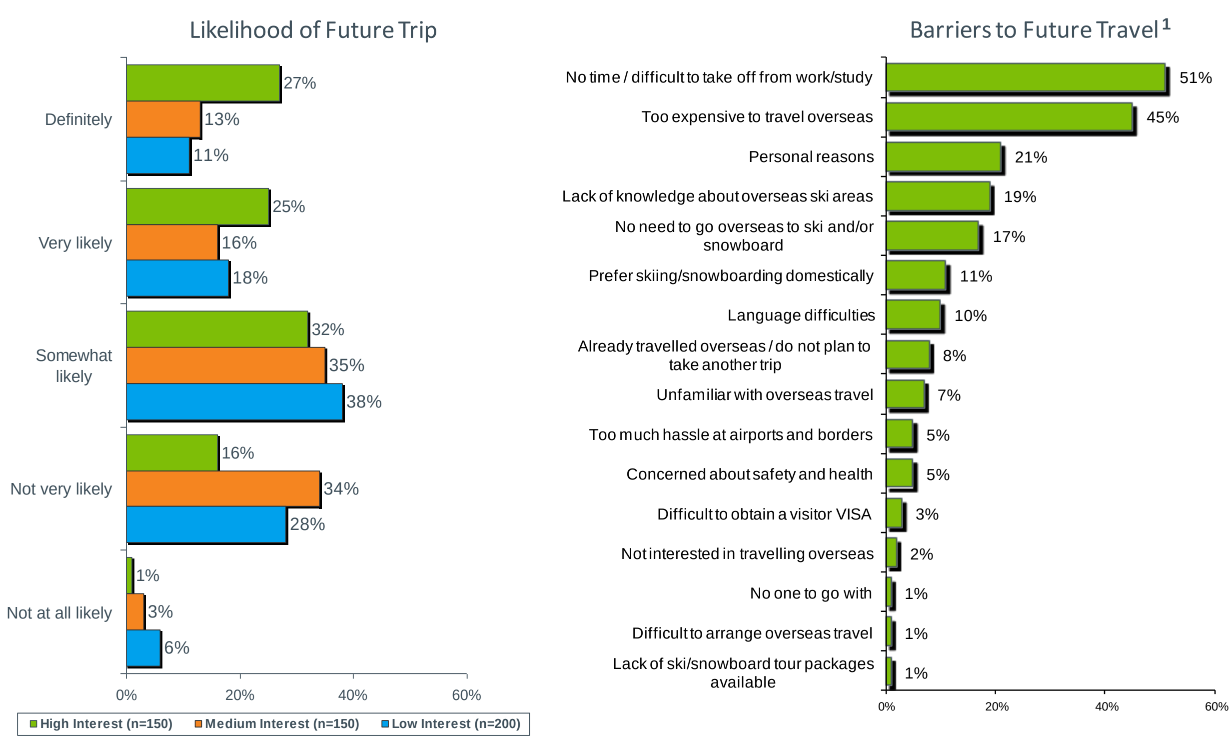
Future Ski Trips Outside of China

While just over half of the High Interest skiers feel they will likely be travelling outside of China in the next two years to ski/snowboard (52%, including only 27% who are definitely likely), about a third of the Low and Medium Interest groups make this claim (both 29% very likely /definitely). Overall, 35% of respondents surveyed are definitely or very likely going to travel outside of China to ski in the next two years (Exhibit 5.1).

Among those not likely to travel outside of China for skiing in the next two years, the most common reason given by the majority of High Interest skiers is the lack of time they have (56%). Likewise, the Medium Interest skiers are also mainly discouraged by the lack of available time they have (63%). Low Interest skiers, on the other hand, indicated the cost of travelling overseas (62%) as the strongest barrier to travel, most likely correlated to the higher percentage of this group who are in the lower income bracket (Exhibit 5.2).

Exhibit 5.1. Future Ski Trips – Likelihood and Barriers

C1. In the **next two years**, how likely is it that you will take a holiday trip **outside of China** where you will ski/snowboard at least once while on the trip?
C2. Please indicate why you won't be likely to travel overseas to ski/snowboard in the next two years?



Base: All Respondents (n=500)

[1]Those who are not likely to travel overseas to ski/snowboard in the next two years (n=152).

Exhibit 5.2. Future Ski Trips – Likelihood and Barriers by Skier Type

C1. In the **next two years**, how likely is it that you will take a holiday trip **outside of China** where you will ski/snowboard at least once while on the trip?
C2. Please indicate why you won't be likely to travel overseas to ski/snowboard in the next two years?

		High Interest (n = 150)	Medium Interest (n = 150)	Low Interest (n = 200)
Likelihood of Travelling Outside of China	Definitely	27%	13%	11%
	Very likely	25%	16%	18%
	Somewhat likely	32%	35%	38%
	Not very likely	16%	34%	28%
	Not at all likely	1%	3%	6%
Barriers to Travel[1]	No time / difficult to take longer period off from work/study	56%	63%	38%
	Too expensive to travel overseas	22%	35%	62%
	Personal reasons	4%	25%	25%
	Lack of knowledge about overseas ski areas	0%	16%	29%
	No need to go overseas to ski and/or snowboard	22%	12%	19%
	Prefer skiing/snowboarding domestically	22%	9%	9%
	Language difficulties	0%	7%	16%
	Already travelled overseas / do not plan to take another trip	33%	5%	0%
	Unfamiliar with overseas travel	0%	5%	10%
	Too much hassle at airports and borders	0%	7%	4%
	Concerned about safety and health	4%	5%	4%
	Difficult to obtain a visitor VISA	0%	4%	3%
	Not interested in travelling overseas	0%	2%	3%
	No one to go with	0%	2%	1%
	Difficult to arrange overseas travel	0%	4%	0%
	Lack of ski/snowboard tour packages available	0%	0%	1%

Base: All Respondents (n=500)

[1]Those who are not likely to travel overseas to ski/snowboard in the next two years (High Interest n=27, Medium Interest n=57, Low Interest n=68).

Future Ski Trips to Canada

Respondents were asked to indicate their level of interest in, and likelihood of, taking a ski/snowboard trip to Canada in the next two years. While interest is high, the likelihood of taking such a trip is relatively low.

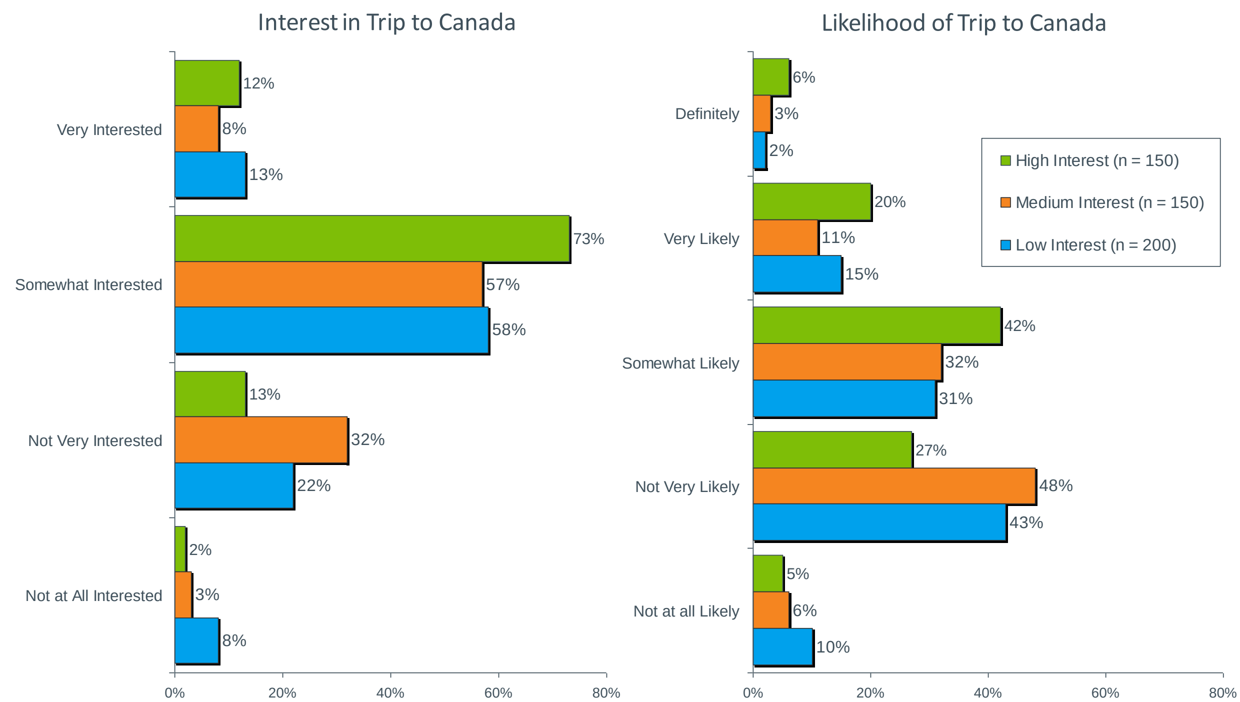
The majority (85%) of the High Interest group indicated that they were at least somewhat interested; while very few (12%) indicated a strong interest in the idea. Low and Medium Interest groups were less likely to be interested in, but still enthusiastic about a trip to Canada (71% and 65%, respectively) (Exhibit 5.3).

When asked how realistic this ski/snowboard trip to Canada was in the next two years, most reduced their outlook substantially. High Interest respondents remained the most enthusiastic as just over one quarter (26%) felt this trip was very likely or definite (6%). Half that amount in the Low (17%, including 2% who were definite) and Medium (14%, including 3% who were definite) Interest groups showed that level of commitment to such a trip.

Realistically, this translates into about 5%[2] of the High Interest group and less than 5% of the Low and Medium Interest groups saying they would definitely travel to Canada in the next 2 years to ski or snowboard (Exhibit 5.3).

Exhibit 5.3. Future Ski Trips – Interest in Ski/Snowboard Trip to Canada in Next 2 Years.

D3. How interested are you in taking a ski/snowboard trip to Canada in the **next two years**?
D4. Realistically, how likely are you to take a ski/snowboard trip to Canada in the **next two years**?



Base: All Respondents (n=500)

[2] *Due to the nature of the convenience sample (i.e. predetermined quota for interviews at selected ski resorts) used for this project, the percentages provide insights into the potential of the Chinese outbound ski market but should not be applied to calculate the overall outbound ski market size from China. Deriving quantitative measures is outside of the scope of this study.*

Chapter 6 – Considerations

Poised for Travel

High and Medium Interest skiers/snowboarders are affluent and educated and accustomed to long-haul travel. While Japan and Switzerland may be top of mind ski destinations, Canada is in the back of their mind as a destination they have visited in the past three years. These skiers may be poised for a return trip to Canada as we see an increase in the number of low-cost airlines, more direct air routes to long-haul destinations and more discounted package prices online. British Columbia stands out as a place that Chinese travellers are likely to visit in the next two years, giving an edge to ski destinations that are ready to market themselves to the Chinese skier/snowboarder.

Competitive Destinations

Clearly the competition for ski vacations lies in Japan and Switzerland, either equal or better in terms of ski experiences offered. If Canada is to compete with these two destinations they will have to offer ski packages that include not only airfare to the destination but also accommodations, meals, lift tickets, travel insurance, equipment and skiwear rentals, admissions to other attractions, and other short excursions or sightseeing tours.

The ideal ski destination must be promoted as a reliable ski facility with good snow conditions set in magnificent scenery – all at an affordable price. Secondary to this the ski destination must present options to attract the Chinese ski/snowboard traveller, in terms of ski runs for all levels of ability, a variety of ski packages, a variety restaurants and accommodation choices and, a range of entertainment choices.

Varied Activities and Experiences

High Interest skiers/snowboarders are likely to take trips of that average just under 10 days of which about 2 days are spent skiing/snowboarding so resorts that offer other activities both at the resort and off the resort will be in a better position to attract these travellers. Chinese travellers have an appetite for trying to see and do everything on a vacation trip. Destinations that offer other winter activities, beyond skiing and snowboarding, such as city trips, sampling local flavours, visits to wilderness areas, taking in arts, cultural, sporting and entertainment experiences, along with opportunities to dine and shop will be attractive to this group of travellers.

Reaching Chinese Consumers

While travel agents and Internet travel suppliers (e.g. ctrip.com) are the top choices for booking a ski vacation, word of mouth and television travel shows reach the biggest percentage of Chinese ski and snowboard consumers. Other means of reaching these consumers include destination websites, articles in travel/in-flight magazines, travel blogs, podcasts and forums, consumer travel shows and exhibitions, travel agents, and online advertising.

Barriers to Overcome

The large majority of Chinese skiers/snowboarders are not highly skilled. Only 16% of the High Interest group consider themselves to be advanced or expert level skiers while all of the Low and Medium Interest groups are beginner or intermediate level skiers/snowboarders. Some barriers such as a lack of time or personal reasons are hard to overcome, others may be addressed through increased promotion and marketing. Chinese travellers are not overly optimistic about the likelihood to travel to Canada for a ski vacation in the next 2 years, and there is clearly a lack of knowledge about Canada's ski areas. Clearly this lack of knowledge about particular resorts - only Whistler registered more than 20% on the knowledge scale- is something that needs to be addressed.