Outdoor Adventure

MAY 2014

Outdoor adventure at a glance in British Columbia

Provincial park visitation (2010-11)	19.7 million	Total outdoor adventure tourism spending (2005)*	$1.2 billion
National park visitation (2012-13)	2.4 million	Total outdoor adventure tourism jobs (2001)*	21,000
Outdoor adventure tourism participation (2005)*	1.2 million	Number of outdoor adventure tourism businesses (2005)*	2,200
Top target markets: British Columbia, Canada, United States, and Europe			

* Commercial-based

Sources: Destination British Columbia, Parks Canada, BC Parks

About outdoor adventure

Visitors cite the natural environment, diversity of outdoor activities, and spectacular scenery as primary motivators for choosing to vacation in British Columbia. Thanks to geographic diversity, British Columbia offers a multitude of outdoor adventure activities from mass participation activities, such as hiking and camping, to specialty activities, such as rock climbing and mountain biking. Parks and public land are a crucial ingredient for outdoor adventure activities. According to BC Parks, British Columbia has 1,030 provincial parks, recreation areas, conservancies, ecological reserves and protected areas covering nearly 14 million hectares (approximately 14% of the provincial land base). In addition, British Columbia has approximately 6,300 public trails totalling more than 28,000 kilometres. There are also five national parks in British Columbia.

In British Columbia, *outdoor adventure tourism* is often defined as activities that present the participant with risk and challenge. Activities are often divided into two types; hard and soft adventure. Hard outdoor adventure, such as white water rafting, tends to require more experience, better physical fitness, and presents more potential danger than soft outdoor adventure, such as wildlife viewing. Types of activities can be further classified by resources used and/or season. This includes land-based activities which includes summer activities (e.g., rock climbing) and winter activities (e.g., downhill skiing), and water-based activities which includes freshwater activities (e.g., river rafting) and saltwater experiences (e.g., scuba diving).

For this profile, participation in outdoor adventure activities within one's community is considered outdoor recreation. When travel is motivated by participation in an outdoor recreation activity, it becomes outdoor adventure tourism (also known as nature-based tourism).

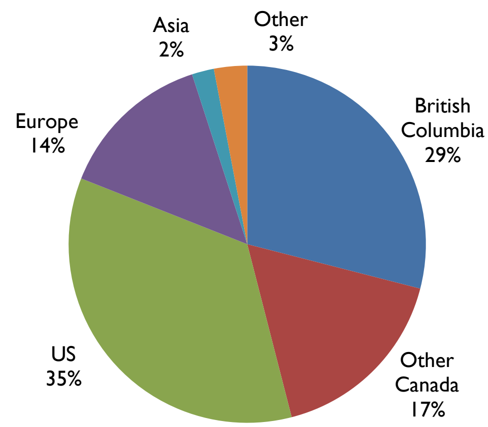
Global volume

The size and scope of this sector globally is unknown, but growth is evident. The 2013 Adventure Tourism Market study shows 42% of Europeans and North and South Americans reported the main activity of their most recent trip (domestic or international) to be adventure-related, up from 26% in 2010. Approximately 37% of international travellers participated specifically in soft outdoor adventure activities and 5% participated in hard outdoor adventure activities.

Markets of interest

In 2005, over 1.2 million people participated in British Columbia commercial outdoor adventure tourism, an increase of 24% from 966,000 in 2001. US visitors and British Columbia residents are the heaviest participants of outdoor adventure tourism in British Columbia.

British Columbia outdoor adventure tourism participation by market



Source: Characteristics of the Commercial Nature-Based Tourism Industry in British Columbia (2005)

BC OUTDOOR ADVENTURE PARTICIPATION

According to the 2009/10 *Outdoor Recreation Study: BC Resident Participants*, published by Destination BC in 2013, the majority of British Columbia residents (91%) participated in at least one outdoor recreation activity during the past year. Of those that had participated, nearly two-thirds (64%) participated in activities at least once a week.

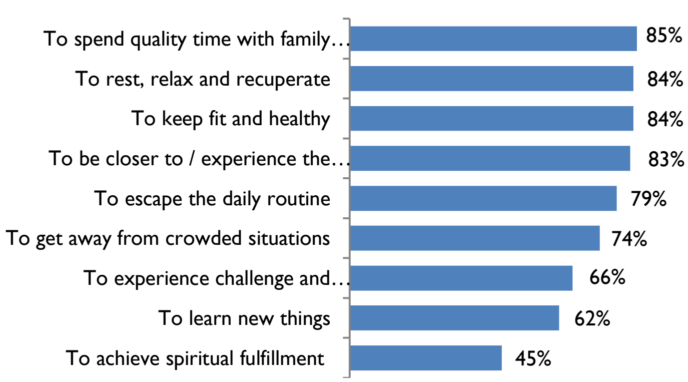
The most common outdoor recreational activities of British Columbia residents include day hiking (55%), beach activities (51%), and swimming at a lake or river (49%). Participation rates vary by region and tend to depend on recreational assets available (e.g. higher participation in ocean activities among those living on the coast).

Top 10 outdoor recreational activities among British Columbia residents	British Columbia tourism regions						
	Total	CCC†	KR†	NBC†	TOTA†	VCM†	VI†
Day hiking	55%	58%	69%	53%	53%	53%	60%
Beach activities (freshwater)	51%	66%	70%	63%	67%	46%	47%
Swimming (freshwater)	49%	63%	73%	56%	63%	43%	52%
Road biking / cycling	44%	51%	44%	39%	39%	46%	42%
Beach activities (ocean)	43%	15%	16%	18%	14%	48%	60%
Other nature viewing or scenic photography	37%	52%	57%	47%	45%	32%	41%
Car camping	29%	34%	42%	33%	31%	28%	30%
Bird watching	28%	34%	46%	29%	32%	25%	32%
Swimming (ocean)	25%	12%	10%	11%	8%	28%	36%
Fishing (freshwater)	24%	51%	41%	50%	40%	18%	22%

Source: 2009/10 Outdoor Recreation Study: BC Resident Participation (2013)

British Columbia residents' primary motivators for outdoor recreation participation are to spend quality time with friends / family, to rest, relax, and recuperate, and to keep fit and healthy.

Top motivations for participating in outdoor recreation for British Columbia residents



Source: 2009/10 Outdoor Recreation Study: BC Resident Participation (2013)

British Columbia's provincial parks visitation has remained steady over the past 5 years, with approximately 20 million visits annually. The majority (87%) of provincial park visitation is attributed to day use.

2010-11 British Columbia's provincial parks visitation	Park visits Thousands (,000)	Share of provincial parks visits Share of total
1. Day use	17,133	87%
2. Camping	2,359	12%
3. Boating	187	1%
Total	19,679	100%

Source: BC Parks (2013)

CANADA OUTDOOR ADVENTURE PARTICIPATION

The most popular outdoor adventure activities for Canadians are day hiking (18%), road biking (16%), and car camping (12%).

As many outdoor adventure activities take place outside urban environments, it is important to understand attitudes towards wilderness. Approximately two-thirds of Canadians enjoy being in the wilderness, however a large portion has fears about remoteness. If the activity they enjoy requires them to do so, approximately 20% of Canadians will venture into the wilderness.

Visitation to Canada's national parks, reserves and marine conservation areas within British Columbia has remained steady over the past 5 years, with approximately 2.4 million visits annually. The most visited national park in British Columbia was Pacific Rim (31%), followed by Mt. Revelstoke & Glacier (27%).

2012-13 British Columbia's national parks visitation	Park visits Thousands (,000)	% change (2012-13)	Share of national parks visits Share of total
1. Gwaii Hanaas & Haida Heritage Site	1.8	4%	0%
2. Kootenay	435	2%	18%
3. Mt Revelstoke & Glacier	643	1%	27%
4. Pacific Rim	753	-1%	31%
5. Yoho	560	2%	23%
Total	2,393	1%	100%

Source: Parks Canada (2013)

† Cariboo Chilcotin Coast (CCC), Kootenay Rockies (KR), Northern British Columbia (NBC), Thompson Okanagan (TOTA), Vancouver, Coast & Mountains (VCM), and Vancouver Island (VI).

US OUTDOOR ADVENTURE PARTICIPATION

In 2012, nearly half (49%) of US residents over the age of six participated in outdoor adventure activities. Of those that participated, nearly a quarter participated in outdoor activities at least twice per week.

For US residents, the top three motivators for participating in outdoor adventure include to get exercise (70%), to be with family / friends (54%), and to keep physically fit (51%).

Top motivations for participating in outdoor adventure for US residents

Source: Outdoor Industry Association (2013)

US residents made more than 725 million visits to US state parks in 2011. While overall park visitation numbers are steady, there is a downward trend in per capita visits.

Visitor characteristics

British Columbia's outdoor adventure travellers are younger than other travellers, with an average in the mid-30s. The majority are male and single / never married. More than a third are university educated.

Generally, British Columbian males are significantly more likely to participate in road biking, camping, freshwater fishing and mountain biking, whereas women are more likely to participate in soft outdoor adventure activities including beach activities, nature viewing / scenic photography, bird watching and whale watching. Day hikes, cross-country skiing, and road biking all show fairly strong participation until age 65. Participation in hard outdoor adventure activities, such a mountain biking declines after age 45 and more extreme hard adventure activities, such as paddling and back-country skiing are most prevalent under age 35.

US residents who are outdoor enthusiasts are slightly more likely (55%) to be male, almost half (49%) are married, and almost two-fifths (38%) have a post-graduate degree / college diploma.

Trends

In recent years, there has been greater demand for experiences from visitors that involve cultural and natural discovery through physically active and exhilarating activities. Operators and destinations have been adapting their products to meet this demand.

While growth in the outdoor adventure tourism sector has been strong in recent years, the Adventure Travel Trade Association predicts slower growth over the next decade, reaching a plateau in 2020.

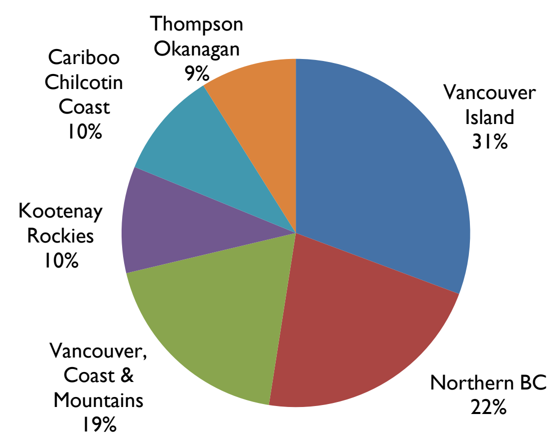
Key market segments for British Columbia's outdoor adventure products are aging. Physical limitations of aging participants may require businesses to address potential accessibility concerns. As the population ages, demand for soft adventure activities, such as wildlife viewing and walking is expected to grow.

While overall park visitation statistics are holding steady, per capita visitation is falling in both Canada and the US. Reasons include less leisure time, changing priorities, and an aging population. Increasing park visitation may be an ongoing challenge.

Economic value

There are approximately 2,200 outdoor adventure businesses in British Columbia, ranging from accommodation to guiding services. Nearly half (45%) of these businesses rely on land resources, both summer and winter activities, and almost two-fifths (38%) rely on saltwater resources, and one-sixth (17%) rely on fresh-water resources. Although ranging in size and experience, small businesses predominate (average of 3 full-time employees) and most have operated for a long time (average business has operated for 16 years). More than half of these businesses operate within the Vancouver Island or Vancouver, Coast & Mountains regions.

British Columbia's outdoor adventure businesses by region



Source: Characteristics of the Commercial Nature-Based Tourism Industry in British Columbia (2005)

In 2001, British Columbia's outdoor adventure tourism accounted for 21,000 jobs and $556 million in wages. As many outdoor adventure activities are undertaken by residents within their own community, the sector's size and economic value cannot be completely attributed to tourism.

In 2005, it was estimated that outdoor adventure tourism generated approximately 12% of British Columbia room revenue and accounted for $1.2 billion in spending (up from $909 million in 2001). Total business revenues equaled $854 million. In 2001, GDP totaled $783 million.

While comprehensive province-wide estimates of the sector overall have not been made since 2005, economic impact data for several sub-sectors of outdoor adventure has been produced more recently.

British Columbia's economic impact (selected outdoor adventure activities)		Total revenue ($ millions)
Outdoor adventure activity	1. Scuba Diving (2003)	$15
	2. River Rafting (2005)	$15
	3. Sea Kayaking (2006)	$11
	4. Mtn Biking - Sea to Sky Corridor, including Whistler Bike Park (2006)	$10
	5. Mtn Biking - Golden and Rossland (2010)	$1

In the US, $646 billion was spent on outdoor adventure activities in 2012. Spending was divided between trips and travel-related spending ($525 billion) and gear purchases ($121 billion). The US outdoor adventure tourism economy grew approximately 5% annually between 2005 and 2011 when many sectors contracted due to the economic downturn. Outdoor adventure accounts for 6.1 million US jobs. US state parks in 2011 provided a collective $20 billion economic benefit to communities surrounding state parks.

According to the Adventure Travel Trade Association, globally, adventure travellers average trip spending increased from $593 in 2009 to $947 in 2012 (excluding air fare and gear), which is an annual increase of nearly 20%. The average length of an adventure trip was 10 days. Total gear sales for adventure trips increased by 19% per year from 2009 to 2012, reaching an estimated $82 billion in 2012.

The Adventure Travel Trade Association estimates the adventure travel market in North and South America and Europe is worth $263 billion US.

Barriers to growth

Due to the diversity of outdoor adventure activities, there are numerous potential barriers that could curtail growth in any one area. Potential issues include land access challenges (loss of tenure to other sectors or length of time to acquire tenures), government regulatory requirements, underinvestment in maintenance and infrastructure, and climate change impacts (e.g., declining snow packs, rising sea levels).

For more information, please contact:
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