



RESEARCH AND PLANNING

FORT STEELE HERITAGE TOWN VISITOR STUDY 2007 RESULTS

May 2008

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Acknowledgements

The 2007 Fort Steele Heritage Town Visitors Study was a comprehensive survey of travellers to Fort Steele Heritage Town and the East Kootenay region between May and September 2007.

The Fort Steele Heritage Town Visitor Study was a partnership between Tourism British Columbia, the Ministry of Tourism, Culture & the Arts¹ (Tourism Development Branch and Heritage Branch) and Fort Steele Heritage Town.

Partial funding for this study came from the Ministry of Tourism, Culture & the Arts - Heritage Branch.

Tourism British Columbia and partners would like to gratefully acknowledge the following organizations that assisted with the project by providing access for on-site interviews of their visitors.

- City of Kimberley
- Fort Steele Heritage Town
- 393 Dairy Bar

This report was partially written by the Kim Nuernberger of Agency Research Consultants on contract with Research and Planning, Tourism British Columbia.

¹ Formerly Ministry of Tourism, Sport and the Arts.

Executive Summary

Thousands of tourists and local residents attend cultural and arts festivals, fairs and attractions across Canada every year. They leave these sites with new experiences, new knowledge and with valuable impressions that can help organizers make more informed design, planning and marketing decisions. If they are tourists, these visitors inject money into the local community, adding to its economic well-being. A consortium of national, provincial and territorial organizations² produced a series of publications known as *The Guidelines for Survey Procedures* designed to generate credible and consistent inputs for estimating the tourism economic impact of festivals, events and attractions. *The Guidelines* can also be easily adapted for a variety of visitor studies depending on the information needs and research objectives of individual festivals, events and attractions.

Due to increasing funding needs as well as product development and marketing needs of heritage attractions in communities around the province, Tourism British Columbia (Research & Planning) in partnership with the Ministry of Tourism, Culture and the Arts (Tourism Development & Heritage branches) and Fort Steele Heritage Town identified the need to test the effectiveness of the survey procedures outline in the Guidelines. *The Guidelines: Survey Procedures for Tourism Economic Impact Assessments at Permanent, Gated Attractions* was used in this study to explore the impact and benefit of Fort Steele Heritage Town and to better understand the positioning of the site as a unique British Columbia attraction. Specifically, the study objectives were:

1. To profile travellers to Fort Steele Heritage Town and the East Kootenay region in terms of traveller and trip characteristics in order to support market and product development;
2. To collect and provide expenditure data to the Ministry of Tourism, Culture and the Arts for their estimation of the economic analysis of Fort Steele Heritage Town.

A three-location, two-stage survey design was used to achieve the study objectives. Travellers were interviewed at three locations: Fort Steele Heritage Town and two reference sites (Kimberley and Elko). The purpose of collecting information from the reference sites was to obtain information about the typical traveller to the East Kootenay region for comparison with travellers who visited Fort Steele Heritage Town. On-site interviews collected information from travellers during their trip and a mailback questionnaire collected information from travellers after their trip. The purpose of the mailback questionnaire was to gather information about trip motivation, planning, experiences and activities, and to understand travellers' perceptions of the East Kootenay region and British Columbia upon trip completion.

² Sponsors of the original and/or subsequent Guideline projects: Alberta Tourism, Parks, Recreation and Culture; British Columbia Ministry of Tourism, Culture and the Arts; Canadian Tourism Commission; Federal-Provincial-Territorial Culture/Heritage and Tourism Initiative; Government of the Northwest Territories – Department of Resources, Wildlife, & Economic Development; Government of Yukon – Department of Tourism and Culture; Nova Scotia Department of Tourism, Culture and Heritage; Ontario Ministry of Tourism; Tourism British Columbia; Tourism Prince Edward Island.

- Between May 18 and October 6, 2007, a total of 2,482 people were approached either at Fort Steele Heritage Town or one of the two reference sites. Of those, 1,771 agreed to complete the interview. However, 54 of these individuals had already completed the survey at a different location and were not invited to participate a second time. Among those intercepted at the reference sites, 334 were excluded as they were from the local area, and an additional four were excluded who were part of an organized tour group. The final result was 1,373 useable surveys.
- Sixty-four percent of travellers intercepted at one of the three survey locations agreed to complete the mailback survey and 59% of these returned the mailback surveys by January 22, 2008, resulting in 438 useable surveys for analysis.
- Overall, a third of Fort Steele visitors were from British Columbia (including those from the local area), and almost a fifth of all visitors intercepted at Fort Steele were from the East Kootenay region³ (17%, Table 3). However, only a quarter of independent, non-resident travellers to Fort Steele were from British Columbia. Similarly, a fifth of visitors interviewed at the reference sites were from British Columbia (26% Fort Steele; 21% Reference Sites).
- With respect to age and education, there were no practical differences between independent travellers at Fort Steele Heritage Town and Kimberley and Elko reference sites. The largest observed difference in age was found among those 65 years of age or older where those from Fort Steele were slightly more likely to be included in this age category. Overall, approximately three quarters of all travellers interviewed were 45 years of age or older (77% Fort Steele; 71% Reference Sites) with a quarter between 55 to 64 years of age.
- On average, travel parties were comprised of 2.8 persons. Not surprisingly, travel parties that included children were larger than average at 4.2 people. Among those travelling without children, the average travel party size was 2.3 persons. No differences were seen in travel party size among visitors to Fort Steele and the reference sites.
- Overall, 81% of all travellers indicated that the primary purpose of their trip was for leisure. This number was higher among independent travellers to Fort Steele, compared to those interviewed at the reference sites (Fort Steele 83%; Reference Sites 76%).
- Three quarters (75%) of all travellers used cars, trucks, or motorcycles as their primary mode of transportation (73% Fort Steele; 77% Reference Sites) and just over one fifth indicated they used a recreational vehicle or campers (20% Fort Steele; 21% Reference Sites).

³ The East Kootenay Region is defined according to the boundaries identified by the East Kootenay Regional District. For comparative purposes, travellers interviewed at Fort Steele who were residents of the Cranbrook region (defined above) or who were part of a tour group were not included in the group identified as Fort Steele Independent Travellers. Unless otherwise noted, comparative figures provided in the brackets were made between Fort Steele Independent Travellers and those interviewed at the Reference Sites at Kimberley and Elko.

- Just under half of all overnight travellers used resorts, hotels, motels, and/or B&Bs as their primary accommodation (45%). Fort Steele visitors were more likely to indicate fixed roof accommodation (48% Fort Steele; 36% Reference Sites). One third of travellers at both locations reported staying at a campground or RV park (37% Fort Steele; 36% Reference Sites).
- One quarter of all travellers indicated they were touring with no specific destination. Independent travellers to Fort Steele, however, were twice as likely to indicate having no primary destination compared to those from the reference sites (32% Fort Steele; 16% Reference Sites). Among all travellers who indicated a specific destination, the majority (54%) selected a destination within the Kootenay Rocky region, while a total of 60% indicated a destination within British Columbia. Independent travellers to Fort Steele were less likely to select a destination in the Kootenay Rocky region (43% Fort Steele; 62% Reference Sites). Outside of British Columbia, the most popular primary destination was Alberta (14% Fort Steele; 7% Reference Sites).
- Overall, 83% indicated they been to the East Kootenay region in the past with almost half (45%) reporting taking between one and three trips to/in the region in the past two years.
- The community that visitors planned to spend time in most often was Windermere / Columbia Valley (including the communities of Fairmont Hotsprings, Radium Hotsprings, Invermere and Panorama) with 39% of all visitors indicating they planned to spend at least one hour in the area. Independent travellers to Fort Steele were most likely to be including this area in their travel plans (52% Fort Steele; 49% Kimberley; 13% Elko).
- The majority did not consider other destinations or routes while planning their trips (82% Fort Steele; 81% Reference Sites). Amongst those that did consider alternatives, the largest group were deciding between other routes or destinations in the Kootenay Rockies (33% Fort Steele; 52% Reference Sites). Visiting friends and family was the most frequently stated reason for choosing their destination or route for reference sites travellers (27%), while visiting a new or recommended location or as part of a tour was cited most often by those who were stopped at Fort Steele (22%).
- The majority (92%) of travellers interviewed indicated they would be stopping and spending time in the East Kootenay region and among these travellers, Fort Steele independent travellers reported slightly shorter stays in the area (5 days Fort Steele; 6 days Reference Sites). No difference was seen between the amount of time independent travellers at Fort Steele and the reference sites indicated they would be spending in British Columbia (9 days at Fort Steele and the Reference Sites) and on their trip in total (15 days for both).
- On average, independent travellers from international countries (other than the US) spent the most time away from home and in British Columbia compared to travellers from other market origins. They spent an average of 19 days compared to 5 days for visitors from the United States, 6 days for British Columbians travelling within the province, and 7 days for visitors from other Canadian provinces.

- There were considerable differences in trip duration by market origin between independent travellers at Fort Steele and those interviewed at the reference sites. At Fort Steele, independent international travellers spent an average of 26 days away from home, whereas those interviewed at the reference sites spent an average of 64 days away from home. US travellers interviewed at the reference sites tended to have longer trips, while independent Fort Steele travellers from Canadian provinces other than BC tended to have longer trips than those from the reference sites. Among independent British Columbia travellers there was no difference in the total trip duration for Fort Steele and reference site visitors.
- Based on responses from the mailback survey, travellers at Fort Steele and the Kimberley/Elko reference sites were quite similar to each other with respect to their travel planning horizons. The majority of travellers spent three or more weeks planning their trip, with most travellers starting planning for their trip 13 or more weeks in advance.
- Past experience was the most often cited information source used for trip planning. Travel guidebooks and brochures were also frequently mentioned sources, while less frequently used information sources included the Internet, and advice from friends and relatives. Travel guidebooks and brochures were selected most frequently as the most useful source for trip planning both before and during the trip.
- Travellers to both Fort Steele Heritage Town and those intercepted at the reference sites were very similar in terms of the travel arrangements they made *before* their trips. Both groups were most likely to book accommodation before travelling, while nearly one third of arrangements for transportation within BC was booked before departure. There were also very few differences in the travel services that visitors to Fort Steele purchased *during* travel compared to those at the reference sites. Nearly all purchases regarding permanent attractions, events, and other activities were completed enroute. Travellers from BC were more likely to make accommodation and transportation arrangements during their trip and conversely those from the US were more likely to make these arrangements prior to leaving.
- A fifth of respondents indicated that golf was their primary leisure activity while in the region. A total of 13% stated that their primary activity was swimming or taking in the local hot springs, while an additional 12% would be hiking, walking or running in the area. Among mailback respondents the top activity at Fort Steele, not surprisingly, was visiting a museum, heritage or historic site, mentioned by nearly three-quarters of Fort Steele visitors, while top activities for travellers to the reference sites included shopping, visiting parks, wildlife viewing and fine dining.
- The majority of travellers to Fort Steele Heritage Town purchased a regular admission or a Steele of a Deal (Regular). Combined these two payment methods made up 86% of all admission purchases (76% regular admission; 10% Steele of a Deal).

- Visitors were asked about the total amount of time they were planning to spend at Fort Steele. The vast majority of visitors indicated they would be spending one day or a part of one day at the attraction (94%). The other 6% of visitors indicated that they would be spending between 2 days and one week at the site, with the largest proportion of multi-day visitors planning to spend 2 days onsite. Over two-thirds of visitors (71%) indicated that they planned on spending between two and four hours at Fort Steele.
- The most commonly cited reason for visiting Fort Steele Heritage Town was to learn about the history of the area (59% of all Fort Steele visitors mentioned this as a reason for their visit). Similarly, to experience the history of the area was the second most often mentioned reason (36%), followed by to see what the 1880s were like (27%).
- Half of all travellers mentioned that they had heard about Fort Steele from family and friends (52%). A third mentioned they heard about Fort Steele through signs along the highway, while a tenth found the information in a tourism guide (11%).
- Overall, visitors to Fort Steele were very satisfied with their experience and all aspects of Fort Steele. A total of 98% rated the overall experience at Fort Steele a 7 or better on a scale of 1 to 10, with 68% providing a rating of either 9 or 10. When asked about specific elements of the Fort Steele experience the highest ratings were given to facility staff (77% rated staff either 9 or 10).
- On average, visitors reported that their travel parties spent \$49.64 while on site. Of the total dollars that visitors reported spending, nearly half (47%) was spent on admission, with food and beverage the second largest spending category (23%). The highest average spending category was souvenirs or items purchased from the gift shop (average expenditure among those who made a purchase in this category was \$29.79) and these types of purchases were made by 36% of visitors.
- A third of visitors to Fort Steele stated that they would be either very or somewhat likely to return in the next 12 months (33%). Just over half of all visitors (56%) stated that they would likely not be returning to the attraction in the next year. The vast majority stated that they would recommend Fort Steele Heritage Town to friends and family (97%) with only 1% stating they would not recommend it at all.
- When visitors to Fort Steele Heritage Town were asked about the importance of the attraction to their decision to visit the East Kootenay region, 39% of Fort Steele visitors and 25% of visitors to the reference sites stated that Fort Steele was either a very important factor (rating of 7-9 on a 10 point scale) or the single most important factor (rating of 10).
- Mailback survey participants were most likely to report that Fort Steele Heritage Town was unique because it was original, unique or authentic (13% of the total responses; 30% of the total respondents), that it was entertaining or enjoyable (13% responses; 30% of respondents), and that it was of historical significance or depicted the history of the area (12% of responses; 27% of respondents).

- The quality of the way Fort Steele was maintained or laid out was the most mentioned positive aspect of Fort Steele (19% of the total responses; 46% of the total respondents) with the high level of customer service provided (13% of responses; 33% of respondents) and the quality of the entertainment or visitors' enjoyment of Fort Steele (12% of responses; 30% of respondents) rounding out the top three positive aspects.
- Among those who supplied information about negative images or characteristics the most common response (32% of responses; 52% of respondents) concerned limited access and restrictions to various facilities, including buildings or portions of buildings that were closed, attractions that were not available, scheduling issues, and challenges in the facility operating hours.
- A total of 123 visitors (29%) indicated that they had visited another heritage or historical attractions on their trip. These included Kimberley's Underground Mining Railway (13%), the Canadian Museum of Rail Travel in Cranbrook (13%), and the SS Moyie at Kaslo (6%).
- When asked if they were likely to return to the East Kootenay region for a future leisure trip, the majority of survey participants indicated that they would (56% very likely to return and 24% likely to return). Only 5% of travellers indicated they were not likely or not at all likely to return to the region.
- The majority of travellers were satisfied with their trip to British Columbia with 89% stating either 'very satisfied' (76%) or 'somewhat satisfied' (13%), and the majority of travellers indicated they would return for a future trip (73% very likely and 19% likely).
- Overall, travellers reported an average spending of \$141.00 per day for their travel party during their trips. Results were similar at the different locations with parties from Fort Steele spending slightly more at \$144.21 per day and parties at the reference sites spending \$135.18. Examining total per person expenditures revealed that each Fort Steele visitor spent an average of \$56.60 per day, compared to \$51.41 per day for each reference site traveller.