



2006 JAPAN SKI CONSUMER &
TRAVEL TRADE RESEARCH
FINAL REPORT

TABLE OF CONTENT

| | | |
|---------------------------------|-------|----|
| Executive Summary | | 3 |
| Objectives and Methodology | | 9 |
| Desk Research Findings | | 11 |
| Travel Trade Interview Findings | | 23 |
| Focus Group Findings | | 33 |
| Consumer Survey Findings | | 45 |

Executive Summary

Japan Tourism Marketing Co. was commissioned by Tourism British Columbia to conduct the 2006 Japan Ski Consumer & Travel Trade Research.

The study consisted of desk research, travel trade interviews, consumer focus groups and a consumer survey.

The following are the key highlights from the four research components.

1. Market Overview

- According to the Japan Productivity Centre for Socio-Economic Development, the number of skiers and snowboarders in Japan had fallen from 17.5 million in 1992 to 12.3 million in 2005.
- Desk research suggests that the decline, which has leveled off since 2003, is due to:
 - A significant decrease in proportion of those under the age of 45 who participate in skiing, the participation rate among those 45+ has been stable. Younger people are much less likely to ski than in the past.
 - A decrease in average length of domestic ski trips
- Domestic ski trips with fellow employees or friends have declined from about 58% of all domestic ski trips in 2001 to about 48% in 2005, while trips with family have increased from 15% to 24% of all trips. This trend probably reflects continued aging of the Japanese ski market.
- Sales of overseas ski packages have declined along with the overall decline in the ski market.
- Whistler has retained an approximately 50% share of the overseas ski market since 1997 – with some fluctuations, year to year.

2. Travel Trade Perspectives

- The travel trade noted the disappearance of younger skiers – most comments on the characteristics of Japanese skiers and ski trips echoed the findings of the desk research.
- The travel trade noted:
 - Length of stay for international ski trips has been increasing.
 - There is an increased interest in other winter activities, such as heli-skiing, snowmobiling, and fresh-track skiing on outbound trips.
 - Japanese skiers/snowboarders are seeking activities on outbound ski/snowboard trips, such as hot springs, spa and dining, in addition to skiing or snowboarding.
 - Language and culture may be barriers that prevent Japanese skiers from fully enjoying the experience on ski trips.
- Whistler is viewed as reasonably priced with relatively easy access.
- Combining time in Vancouver with time in Whistler is seen as a plus.

- Whistler is seen as offering a good experience with high consumer satisfaction and an opportunity to encourage repeat visitation.
- Whistler is seen as a hard sell to older skiers, who are attracted by the historical sites that Europe offers, in addition to skiing.
- The travel trade believes that most readers of ski magazines are in their late 30s and early 40s, that frequency of publication has declined, ski magazines are specializing to specific segments and target advanced skiers rather than younger or new skiers.

3. Consumer Focus Groups

- Two groups were targeted for focus groups:
 - 55 – 65 year old males (perhaps 10% of total market)
 - 38-45 year olds with children 13 or under (perhaps 15% - 20% of market)
- Findings of the focus groups should not be taken as representative of all skiers.

Group 1: Older Males (55 – 65)

- Motivated by:
 - Sense of achievement from improvement of skills
 - Opportunity to see spectacular mountain scenery
- Limited by feeling of decline in strength and/or busy lives
- Perceive overseas skiing:
 - As places to enjoy off-piste and backcountry skiing
 - Attractive because of magnitude of space, scenery and atmosphere not available in Japan
 - As only for advanced skiers – thus anxiety is a major barrier
- Associate Canada with large-scale ski sites and renowned sites, while European sites are stronger on luxurious atmosphere and history. New Zealand is associated with heli-skiing. The US is not seen as a place to ski
- Prefer one week package tours.
- Focus on enjoying winter sports and ski related activities such as backcountry skiing (which is a dream or aspiration), guided skiing and skiing at the Olympic courses
- Motivations for visiting Canada/BC
 - Experiencing nature in Canada in addition to skiing
 - Attending NHL games
 - Interested in hot springs
 - Prefer large-scale ski sites (ie. Whistler) – rather than sites near Vancouver
 - Interested in 2010 Olympics and skiing Olympic courses.

Group 2: 38 – 45 Year olds with children ≤ 13

- Motivated by:
 - Social aspects of skiing
 - Enjoyment of after-ski activities
 - Desire to expose school age children to winter nature

- Feel too busy with work to take long holidays
- Perceive overseas skiing:
 - Attractive because of magnitude of space, scenery and atmosphere not available in Japan
- Perceive Canada as a place of marvels of nature such as Rockies and Aurora, while European sites are stronger on luxurious atmosphere and history. Have no image of New Zealand and do not see the US as a place to ski.
- Prefer one week package tours.
- Males in this group tend to focus on enjoying winter sports while females focus more on ambience of a resort, Christmas lights and illumination.
- Family skiers expect a variety of snow activities, spa, shopping, and good quality accommodations at a ski resort – although females do not like condominium style accommodations because of the implication that they will have to cook meals!
- Snow programs for children is a strong motivator, other activities and sightseeing are medium to weak motivators – except females have a high interest in aesthetics/spa.
- Motivations/preferences for visiting Canada/BC
 - Experiencing nature in Canada in addition to skiing
 - Attending NHL games for males in this group
 - Similar to older male group, prefer large-scale ski sites (ie. Whistler) – rather than sites near Vancouver
 - Not as interested in 2010 Olympics and skiing Olympic courses as older male group.

4. Consumer Survey

- Socio-Demographics of survey respondents
 - Compared to other age segments, male respondents in their 50's and female respondents in their 60's were more likely to have visited Canada in the past.
 - Female respondents over the age of 30 and male respondents in their 50's were more likely to have travelled overseas frequently. Male respondents in their 20's were far less likely to have travelled overseas frequently.
 - Nearly a third of the respondents who came from middle income households (5 to 10 million yen per year) and almost half of the respondents with higher incomes (10+ million yen per year) had been to Canada in the past.
 - Two thirds of the respondents who came from high income households had travelled frequently to overseas destinations.
 - More than 60% of the under 40 respondents did not have children whereas over a third of the older respondents had adult aged children.
 - Over a quarter of the older respondents did not have children.
- Skier/Snowboarder behaviour
 - Participation in skiing varied among different respondent segments. In general, past visitors to Canada, male respondents and respondents with intermediate-advanced ski levels were more likely to have participated in skiing in the past 3

- years. Over a quarter of the respondents over 40 years old had been off the slopes for over 10 years.
- The majority of respondents had beginner to immediate skill levels for skiing. By comparison, male respondents, respondents over 40 years old, and those who skied recently (within the past 3 years) had higher skill levels. A smaller proportion of respondents (around 10%) had just started skiing.
 - Respondents were introduced to the sport of skiing at a variety of ages. By comparison, younger respondents, those who skied recently, and those with intermediate-advanced skill levels were more likely to have taken up the sport in their pre-teen years.
 - Younger respondents and recent skiers/snowboarders were more likely to have been introduced to skiing by family/relatives whereas friends were more influential on older respondents and those who had not skied/snowboarded recently.
 - While the participation level in snowboarding was lower than that of skiing in general, similar characteristics could be observed i.e. male respondents and respondents under 40 years old were more likely to have participated in the past 3 years. Almost half of the respondents over 40 indicated that they would never try snowboarding.
 - Skill levels for snowboarding were lower than those for skiing with a larger proportion of respondent indicating 'no experience'. This was particularly true for respondents over 40 and non-recent skiers/snowboarders.
 - Irrespective of respondent segments, the majority of respondents were introduced to the sport of snowboarding after the age of 19 or older. At least a third of respondents started snowboarding when they were 23 years of age or older.
 - Influence of friends was the top catalyst for all respondents to have taken up snowboarding.
 - The top reason cited for stopping or never skiing/snowboarding was lack of time for all respondents. By comparison, respondents who had never been to Canada before were more likely to indicate cost of travel, cost of equipment and having small children as their barriers.
- Ski destination experience and awareness
 - Overall, Koshinetsu was the most visited ski destination followed by Hokkaido and Tohoku.
 - Among overseas ski destinations, Canada was the most visited. One in five respondents who had previously been to Canada had skied/snowboarded at Whistler and/or Banff.
 - The awareness of Whistler is generally high in that around half of all respondents had heard of Whistler despite that they had never skied/snowboarded or visited the area.
 - Domestic ski destination/accommodation preferences
 - In general, top considerations for choosing a domestic ski destination included snow conditions, variety of ski runs and distance/travel time.
 - Top considerations for choosing accommodations at a domestic ski area included proximity to ski grounds, hot springs, low room rates and good on-site restaurants.
 - Foreign ski destination/accommodation preferences

- Snow conditions, magnificent scenery, variety of ski runs, shopping/dining and sightseeing opportunities were the most frequently mentioned priorities when choosing a foreign ski area.
 - Magnificent scenery, snow conditions and sightseeing opportunities were of the highest priority when choosing a foreign ski area.
 - By comparison, younger respondents and recent skiers/snowboarders placed higher priority on snow conditions when choosing a foreign ski area whereas older respondents and those who had not skied or snowboarded recently placed higher priority on magnificent scenery.
 - Proximity to ski grounds, good on-site restaurants and room with a view were the most frequently mentioned priorities when choosing accommodations at a foreign ski area.
 - Proximity to ski grounds, low room rates, room with a view and luxurious atmosphere were of the highest priority when choosing accommodations at a foreign ski area.
- Profile of domestic skiing/snowboarding trip
 - At least a quarter of all respondents had taken a domestic ski/snowboard trip within the past year. A higher proportion of older respondents (32%) had not skied/snowboarded domestically for at least 10 or more years.
 - Koshinetsu was the most popular domestic ski area followed by Hokkaido, Tohoku and Chubu.
 - On domestic ski/snowboard trips, respondents were most commonly accompanied by friends, spouse and children.
 - Most domestic ski/snowboard trips lasted 3 or fewer days in duration.
 - Overall, almost half of all respondents made their own reservations for their domestic ski/snowboard trip whereas only a third of all respondents used the services of a travel agency for either a free tour plan or a package tour.
- Profile of overseas skiing/snowboarding trip
 - Overall, around three quarters of all respondents had never skied/snowboarded overseas. The majority of respondents who had not been to Canada and over half those who had previously visited Canada had never skied or snowboarded overseas.
 - Similar to domestic ski/snowboard trips, respondents were most commonly accompanied by friends, spouse and children when traveling overseas to ski/snowboard.
 - Destinations for overseas ski/snowboard trips varied significantly among respondent segments. By comparison, younger respondents were much more likely to have skied at Whistler whereas older respondents were more likely to have skied at Banff and European destinations
 - Trip lengths for overseas ski/snowboard trips varied significantly as well. Younger respondents were more likely to have taken trips that lasted 5-6 days or over 16 days in duration whereas older respondents were more likely to have taken trips that were 7-9 days long.
- Potential and barrier of skiing/snowboarding trip
 - The majority of respondents indicated a desire to go skiing/ snowboarding within the next two years but had made not yet made any specific plans.
 - Most frequently cited barriers preventing respondents from skiing/snowboarding overseas included cost and difficulty in taking long vacations.
 - The majority of respondents expressed interest in visiting a snowy country resort within the next two years (by citing 'yes' or 'maybe'). By comparison, male

respondents, recent skiers/snowboarders, and those with intermediate-advanced skill levels expressed a higher level of interest.

- In general, most frequently mentioned motivations for visiting a snowy country resort included hot springs, enjoying snow scenery, looking at an aurora and participating in winter sports.

- Profile of trips to Canada
 - Frequent overseas travellers were most likely to have visited Canada followed by those with intermediate-advanced skill levels as well as recent skiers/snowboarders.
 - Overall, almost three quarters of all respondents were travelling for leisure. Fewer were visiting for business, study/training, or visiting family and friends.
 - Vancouver was the most frequently visited destination by all respondents. Other popular destinations included the Canadian Rockies and Niagara Falls.

- Potential for Canada
 - All respondents who had not been to Canada before expressed a desire to visit in the next two years. Over half of all prior visitors to Canada also expressed some interest in revisiting the country.
 - Over two-thirds of all respondents were aware that the 2010 Winter Olympics were to be held in Vancouver, Canada.
 - The majority of respondents indicated interest (by citing 'yes' or 'maybe') in skiing at the site of the Olympics.

Objectives and Methodology

Japan Tourism Marketing Co. was commissioned by Tourism British Columbia to conduct the 2006 Japan Ski Consumer & Travel Trade Research. The study was intended to:

- determine the current status and trends of the Japanese ski market
- understand the travel behaviours of Japanese skiers/snowboarders
- understand the experiences and preferences of Japanese skiers/snowboarders for domestic and overseas skiing/snowboarding
- understand the interests and needs of Japanese skiers/snowboarders for winter sports in Canada

A four phase study was implemented to fulfill these objectives:

Phase 1: Desk research

Phase 2: Japanese travel trade interviews

Phase 3: Japanese skier/snowboarder focus groups

Phase 4: Consumer quantitative web survey

PHASE ONE: DESK RESEARCH

Secondary research was conducted to gather information for an overview of Japan's ski/snowboard market, domestic ski/snowboard trends, and outbound ski/snowboard trends.

PHASE TWO: JAPANESE TRAVEL TRADE INTERVIEWS

Nine executive interviews were conducted during August and September 2006. The interview sessions were broken down as follows:

- Travel media (i.e. ski magazines) – 4 organizations
- Travel agency – 4 organizations
- Hotel – 1 organization

PHASE THREE: JAPANESE SKIER/SNOWBOARDER FOCUS GROUPS

The objectives of the focus groups were to understand:

- participants' perceptions towards winter sports, and,
- effective winter travel resources and promotional measures.

The topics covered were participants' experience in skiing/snowboarding, perceptions towards overseas ski sites, interest in travel resources for Whistler. The overarching criterion for recruiting focus groups participants was skiers/snowboarders who had an intention to travel overseas to ski/snowboard.

In total, 2 two-hour focus groups were conducted on October 12 and 13, 2006 in Tokyo. The two groups were broken down as follows:

Table 1: Focus group participant information.

| Group | Number of participants | Gender | Age | Ski Level | Income |
|--------|------------------------|--------|---|-------------------------|----------------|
| Older | 6 | Male | 55-65 | Intermediate | CAD50,000 plus |
| Family | 3 | Male | 38-45 with children aged 13 or under | Beginner to advanced | CAD50,000 plus |
| | 3 | Female | | | |

It is believed that the factors that originally motivated these two groups to take up skiing were quite different:

Older:

Several ski movies featuring popular actors skiing in the Alps created a desire for backcountry skiing among this group when they were young.

Family:

The Japanese ski market was booming when these participants were in their early 20s; these participants took up skiing as a way to meet members of the opposite sex, under the influence of the movies in the mid 1980s to early 1990s romanticizing skiing.

PHASE FOUR: CONSUMER QUANTITATIVE WEB SURVEY

A web survey was sent out to about 20,000 Internet panel participants from four major areas of Japan (i.e. Tokyo, Osaka, Nagoya (cities) and Hokkaido). The 20,000 respondents were selected from an online panel which consists of 1,370,000 registrants. The web survey ran from October 6 – 11, 2006 and yielded 500 completed surveys from qualified respondents.

The qualified respondents (n=500) met the following criteria:

- 20 to 69 years old, male or female
- Residents of Tokyo, Osaka, Nagoya metropolises or Hokkaido.
- Annual income more than 3 million yen (approximately CAD\$30,000)
- Intend to experience skiing/snowboarding in overseas
- Had skied/snowboarded at least once
- Had travelled overseas at least once

Quotas were set at 62 or 63 respondents for each of the following 8 groups:

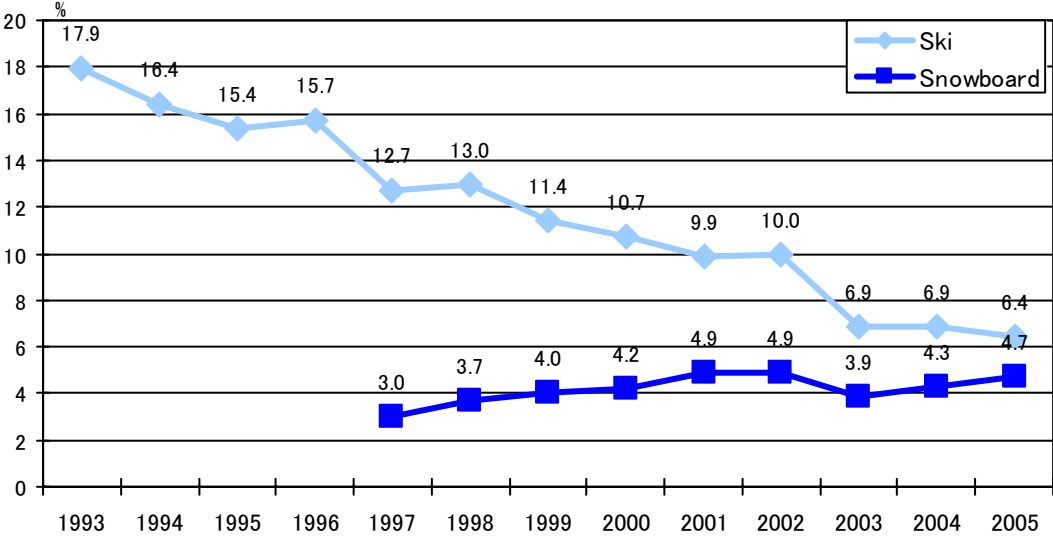
- Female 20-29
- Female 30-39
- Female 40-49
- Female 50-69
- Male 20-29
- Male 30-39
- Male 40-49
- Male 50-69

Section 1. Desk Research Findings

1.1 Overview – Declined Participation in Skiing/Snowboarding

- The Japanese ski market has experienced a prolonged decline since the early 1990s. According to the Japan Productivity Centre for Socio-Economic Development, the number of skiers and snowboarders in Japan had fallen from 17.5 million in 1992 to 12.3 million in 2005.
- Participation rate in skiing dropped from 17.9% in 1993 to only 6.4% in 2005.
- The Japanese snowboard market experienced gradual growth from 1997 to 2001, but stayed relatively stagnant from 2002 through to 2005, with 4.7% of Japanese participating in snowboarding in 2005.

Figure 1: Participation rate in skiing/snowboarding from 1993 to 2005.

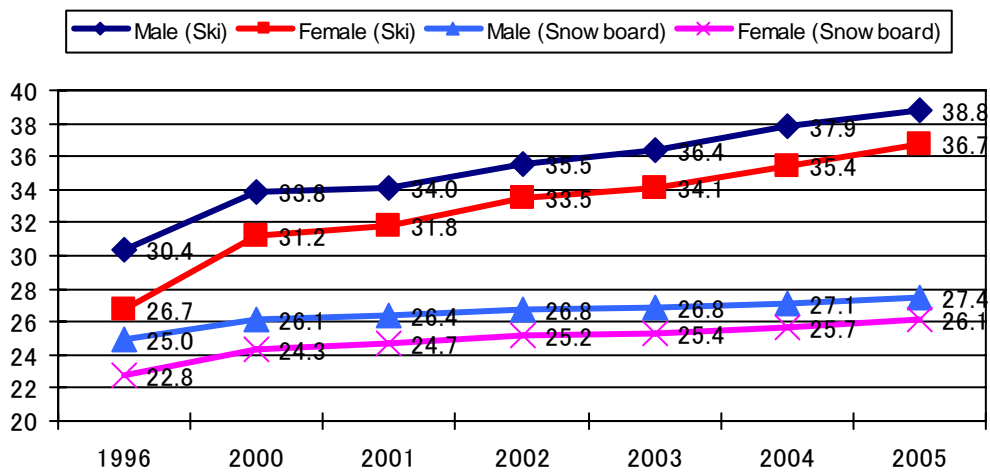


Source: Japan Productivity Centre for Socio-Economic Development

1.2 Overview - An Aging Market

- The Japanese ski market is aging quickly with the average age of Japanese skiers increasing every year since 1996. In 2005, the average age of male skiers was 39 which was almost 9 years older than that in 1996. The average age of female skiers was 37 in 2005, about 10 years older than that in 1996.
- The Japanese snowboard market is aging as well, but at a much slower pace than the ski market. In 2005, the average age of male snowboarders was 27 which was 2 years older than that in 1996. The average age of female snowboarder was 26 in 2005, about 3 years older than that in 1996.

Figure 2: Average age of skiers/snowboarders from 1996 to 2005.



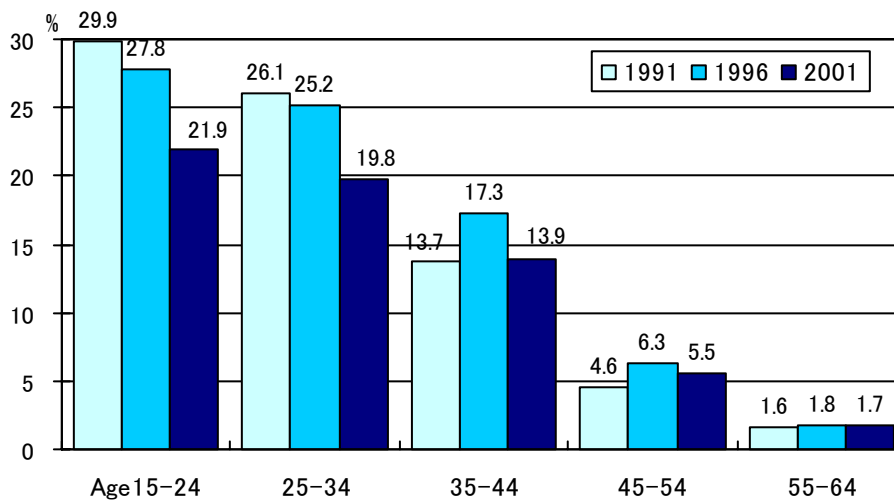
Source: Nippon Cable Co., Ltd. "Ski Site Visitors Survey"

- Along with aging, the average years of ski/snowboard experience has been increasing. Japanese skiers had, on average, 17 years of ski experience in 2004 compared to 10 years in 1996. Japanese snowboarders had, on average, 5 years of snowboard experience in 2004 compared to 2 years in 1996.

1.3 Overview - Decrease of Young Skiers

- One of the major factors that caused the decrease in the Japanese ski market was the decrease in the number of young skiers.
- Younger age groups (i.e. 15-34) experienced the largest decline in participation in skiing, from 30% in 1991 to 22% in 2001.
- Participation rates of older age groups (i.e. 35+) were marginally higher in 2001, compared to 1991, after peaking in 1996.

Figure 3: Change in ski participation rate by age group for 1991, 1996 and 2001.



Source: Ministry of Public Management, Home Affairs, Posts and Telecommunications.
 "Survey on Time Use and Leisure Activities"

- Possible explanations for the decrease of young skiers include fewer group activities taken among university students and fewer ski trips organized by schools. According to the Japan School Tours Bureau, ski trips accounted for 24% of all school trips among Japanese high schools in 1989. This proportion reached its peak in 1993 when 30% of high school trips were ski related but has been on a gradual decline ever since. In 2003, ski trips only accounted for 15% of all high school trips.
- The data above pertain to the period 1991 to 2001. More recent data shows that a diminishing number of ski tours organized within offices, which may be contributing to a further decline of younger skiers. Survey results indicate that the percentage of people who ski with their fellow employees has been decreasing since 2002 when a third of respondents (33%) skied with their fellow employees. In 2005, less than a quarter (24%) of respondents skied with their fellow employees. (Source: Ministry of Public Management, Home Affairs, Posts and Telecommunications. "Survey on Time Use and Leisure Activities")

1.4 Overview – Skier/Snowboarder Demographics

- Since 1996, the proportion of male skiers has been increasing. In 2005, two-thirds of Japanese skiers were male (7 percentage points higher than that in 1996) and a third were female.
- The proportions of male and female snowboarders are more evenly distributed compared to those of skiers, although male snowboarders are still a majority, accounting for 57% of all snowboarders in Japan.
- The share of skiers under the age of 30 has been decreasing rapidly. In 1996, two-thirds of Japanese skiers (66%) were under the age of 30. In 2005, less than a quarter of skiers (23%) were under 30. Instead, more than three quarters of skiers (78%) were over 30 with skiers in their 40s constituting the biggest group (40%).
- Snowboarders under 30 still account for the majority of the Japanese snowboarder market but that market has also shown signs of maturing. In 1996, 9 out of 10 snowboarders (91%) in Japan were under the age of 30 as opposed to only three quarters (75%) in the under 30 age group in 2005.

Table 2: Gender and age distribution of skiers in 1996, 2000, and 2005.

| Skiers | 1996 | 2000 | 2005 |
|---------------|-------|-------|-------|
| Gender | | | |
| Male | 59.6% | 62.4% | 66.6% |
| Female | 40.4% | 37.6% | 33.4% |
| Age | | | |
| 15-19 | 3.7% | 1.8% | 2.1% |
| 20-24 | 30.4% | 12.6% | 5.9% |
| 25-29 | 32.0% | 31.7% | 14.5% |
| 30-39 | 22.1% | 33.3% | 37.2% |
| 40 plus | 11.8% | 20.6% | 40.3% |

Source: Nippon Cable Co., Ltd. "Ski Site Visitor Survey".

Table 3: Gender and age distribution of snowboarders in 1996, 2000, and 2005.

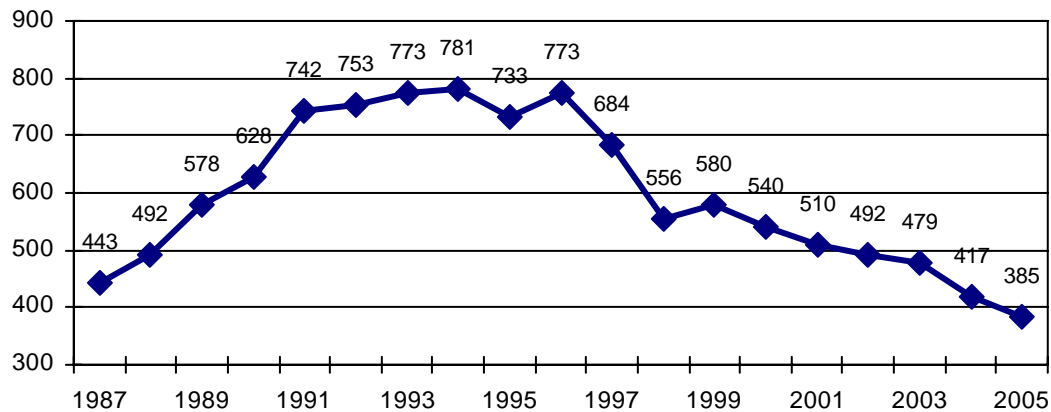
| Snowboarders | 1996 | 2000 | 2005 |
|---------------|-------|-------|-------|
| Gender | | | |
| Male | 58.6% | 53% | 56.8% |
| Female | 41.4% | 47% | 43.2% |
| Age | | | |
| 15-19 | 7.1% | 5.8% | 5.3% |
| 20-24 | 57.0% | 41.5% | 27.8% |
| 25-29 | 26.8% | 40.3% | 42.2% |
| 30-39 | 8.2% | 11.1% | 22.2% |
| 40 plus | 0.9% | 1.3% | 2.5% |

Source: Nippon Cable Co., Ltd. "Ski Site Visitor Survey".

1.5 Domestic Market – Overall Trend

- The rapid growth of the Japanese domestic ski market in the late 1980s was a reflection of a strong Japanese economy. Around 1990, the growth levelled off and remained constant through much of the 1990s. The Japanese ski market has been on a steady decline since 1997. While the financial crisis in some Asian economies in 1997 had a short term impact on Japan, there does not seem to be a clear relationship between economic performance and the Japanese ski market between 1987 and 2005.
- In 2005, the number of passengers of domestic ski lifts reached its all time low of 385 million, a 13% decrease compared to 1987, when the Japanese domestic ski market first started to grow rapidly, and a 51% decrease compared to 1994 when the market was at its peak.

Figure 4: Number of domestic ski lift passengers from 1987 to 2005.

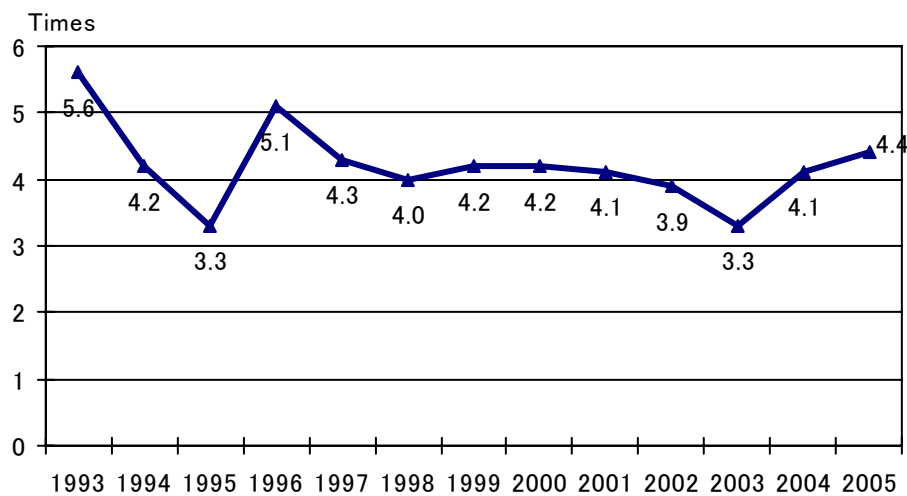


Source: Land, Infrastructure and Transportation Ministry

1.6 Domestic Market – Frequency of Skiing/Snowboarding

- Overall, the frequency of skiing per year by the average skier has declined between 1993 and 2005. The average number of times skiing per year was stagnant in the late 1990s, declining gradually through to 2003, but has been rising since 2003. In 2005, the average time of skiing was 4.4 times, which was a 21% decrease compared to 1993 (record high) and a 33% increase compared to 1995 and 2003 (record low). The decrease in the frequency of skiing per year by the average skier has not been sufficient to explain the decrease in the ski market – rather there has been an absolute decline in the number of skiers. The fluctuation in the average number of times skiing per year may just reflect fluctuations in snow conditions or economic performance from year to year.

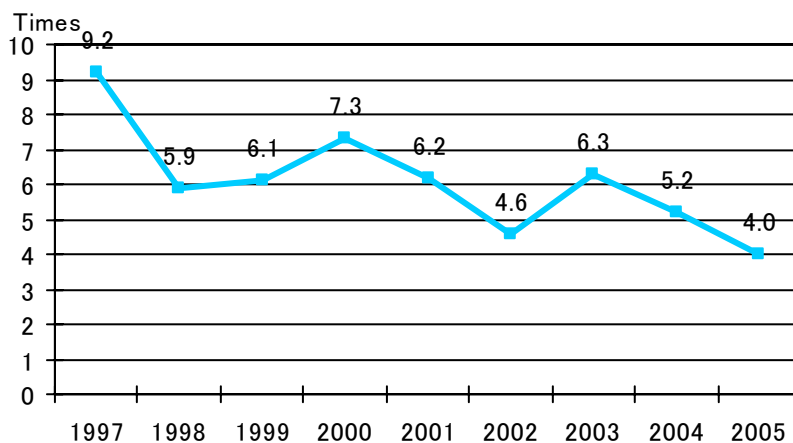
Figure 5: Average time of skiing per year from 1993 to 2005.



Source: Japan Productivity Centre for Socio-Economic Development.

- The frequency of snowboarding per year has dropped from 9.2 times in 1997 to 4.0 times in 2005, a 57% decrease compared to 1997.

Figure 5: Average time of snowboarding per year from 1997 to 2005.

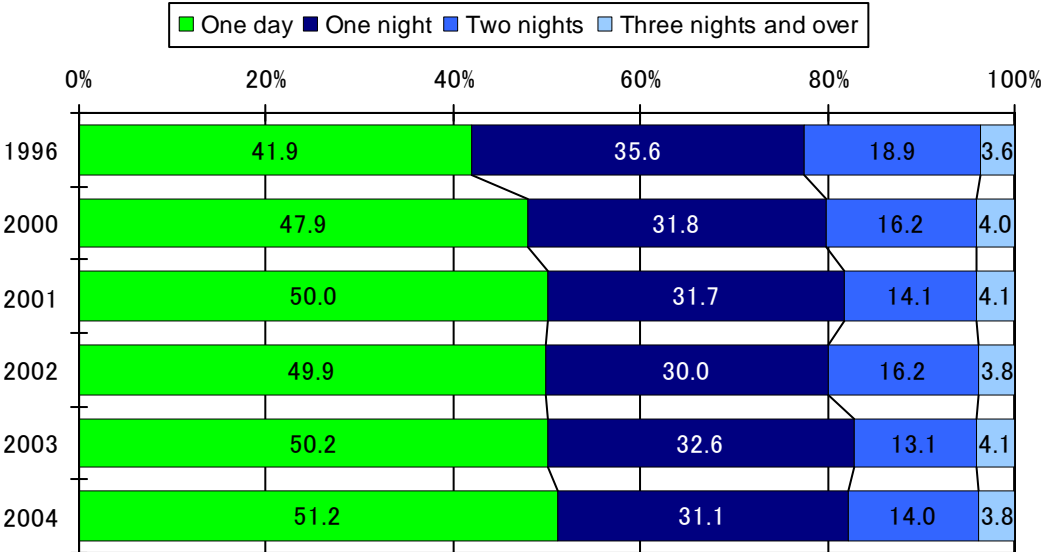


Source: Japan Productivity Centre for Socio-Economic Development.

1.7 Domestic Market – Decreased Trip Length

- Day trips have constituted the majority of Japan’s domestic ski trips. The proportion of day trips in all domestic ski trips increased steadily from 1996 (42%) to 2004 (51%).
- One possible explanation for the increase of day trips is that older skiers try to avoid busy times at ski sites and shorten their length of stay. It may also reflect the desire to reduce the cost of a ski trip and/or the decrease in overnight ski trips by school or employee groups.

Figure 6: Length of stay at ski sites from 1996 to 2004.



Source: Japan Productivity Centre for Socio-Economic Development.

1.8 Domestic Market – Increased Family Travel

- The proportion of skiers that went skiing with children has been increasing. In 2005, nearly a quarter of skiers (24%) visiting domestic ski sites were travelling with their children. On the other hand, the proportion couples or groups of employees skiing together has declined.
- Although the percentage of snowboarders who visit ski sites with children is currently very small compared with that of skiers, it has been gradually increasing as well. As in the case of skiing, the proportion snowboarding with fellow employees or friends, while large, has declined over the last five years.

Table 4: Travel party composition of domestic ski trips from 2001 to 2005.

| | 2001 | 2002 | 2003 | 2004 | 2005 |
|--------------------------------|-------|-------|-------|-------|-------|
| Alone | 2.1% | 2.5% | 2.8% | 2.4% | 2.6% |
| Couple | 11.2% | 9.7% | 8.9% | 8.1% | 7.7% |
| Married couple | 7.4% | 8.1% | 7.9% | 8.6% | 9.6% |
| Family (with children/parents) | 15.4% | 15.9% | 17.4% | 23.2% | 23.7% |
| Family (3 generation) | 1.0% | 1.1% | 1.1% | 1.6% | 1.8% |
| Fellow employees | 31.5% | 33.4% | 31.4% | 26.8% | 24.2% |
| Friends | 26.2% | 22.6% | 24.7% | 22.7% | 24.1% |
| Group | 5.2% | 6.7% | 5.9% | 6.5% | 6.3% |

Source: Nippon Cable Co., Ltd. "Ski Site Visitor Survey".

Table 5: Travel party composition of domestic snowboard trips from 2001 to 2005.

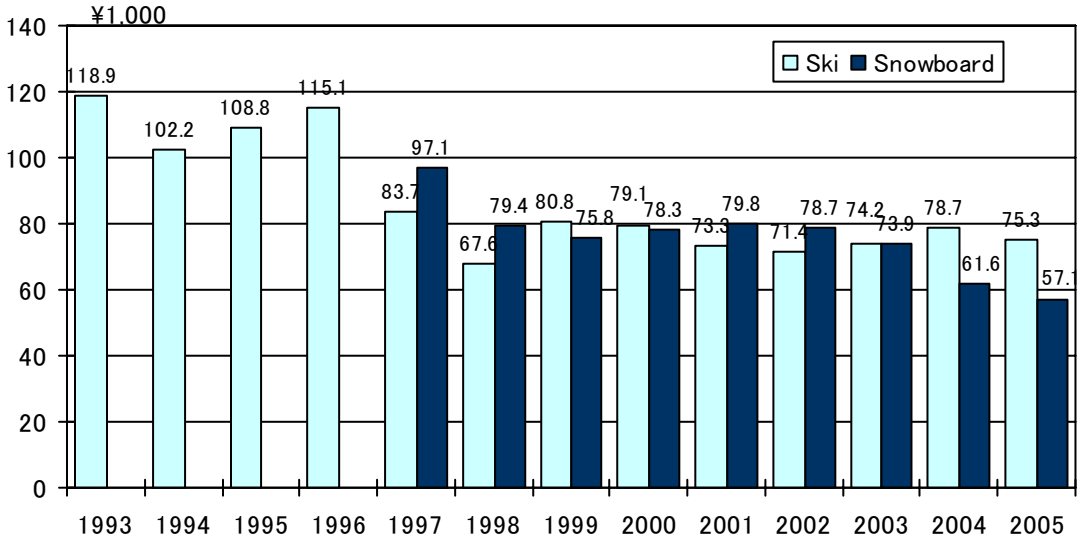
| | 2001 | 2002 | 2003 | 2004 | 2005 |
|--------------------------------|-------|-------|-------|-------|-------|
| Alone | 0.8% | 1.5% | 2.2% | 1.8% | 1.6% |
| Couple | 15.8% | 21.1% | 16.3% | 18.5% | 19.0% |
| Married couple | 2.3% | 3.7% | 3.1% | 3.3% | 3.7% |
| Family (with children/parents) | 2.2% | 2.7% | 3.7% | 3.8% | 4.7% |
| Family (3 generation) | 0.4% | 0.5% | 0.4% | 0.7% | 0.8% |
| Fellow employees | 33.3% | 30.7% | 33.7% | 29.6% | 29.2% |
| Friends | 39.1% | 34.0% | 34.4% | 36.9% | 35.5% |
| Group | 6.1% | 5.8% | 6.3% | 5.4% | 5.6% |

Source: Nippon Cable Co., Ltd. "Ski Site Visitor Survey".

1.9 Domestic Market – Ski/Snowboard Trip Expenditure

- Overall, average expenditure per skier per year has declined from 1993 to 2005. In 1997, the expenditure dropped 27% compared to 1996, and decreased another 19% in 1998 over 1997. The average expenditure rebounded in 1999 and has stayed rather stagnant through to 2005.
- In 2005, average expenditure per skier per year was 75,300 yen (CAD\$742.91), which was a 37% decrease compared to 1993 (record high) and an 11% increase compared to 1998 (record low).
- Average expenditure per snowboarder per year has been declining since 1997. In 2005, the expenditure reached its record low to 57,100 yen (CAD\$563.35), which was a 41% decrease compared to 1997 (record high).
- Average expenditure for snowboarders had been slightly higher than that of skiers from 1997 to 2003. However in 2004 and 2005, the trend seemed to have reversed.

Figure 7: Average expenditure per skier/snowboarder per year from 1993 to 2005.

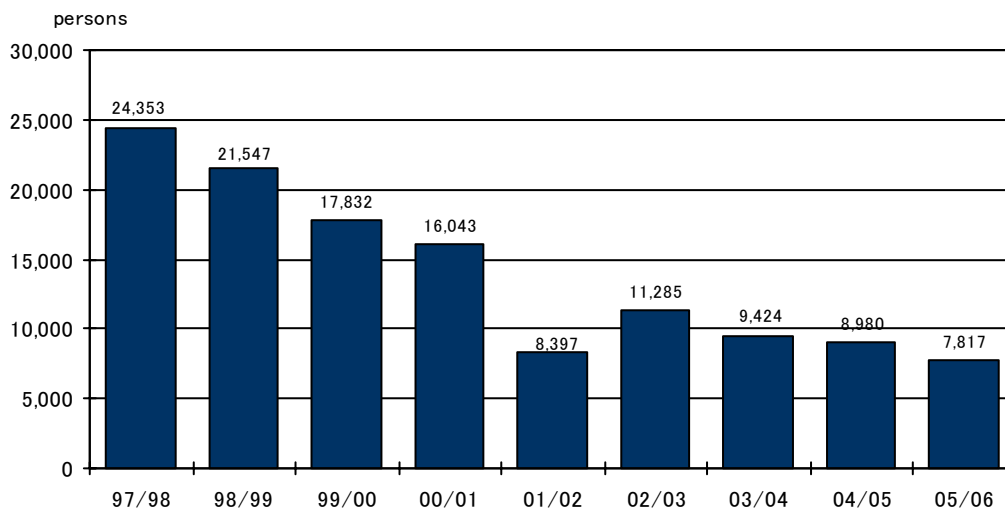


Source: Japan Productivity Center for Socio-Economic Development

1.10 Outbound Market – Declining Trend

- ** Please note that the data in this section only represents a particular sub-group of ski package operators. It does not include all agents, and only includes package tours, not all outbound ski travel.
- The number of Japanese overseas skiers have dropped significantly since the late 1990s. In 2005/2006, the number of participants in overseas ski package tours reached a record low to 7,817 people, which was a 68% decrease compared to 1997/1998 (record high) when 24,353 people went on overseas ski package tours.
- The average age of overseas ski package tour participants has been increasing one year every year. The average age of participants in ski package tours to Canada is about 40 years old whereas the average age of participants in European ski package tours is 52 years old. It has been observed that older skiers and more advanced skiers are more likely to visit Europe or New Zealand while Whistler attracts more general skiers (*Source: Overseas Ski Package Tour Conference*).

Figure 8: Number of people in overseas ski package tours from 1997/1998 to 2005/2006.



Source: Overseas Ski Package Tour Conference.

1.11 Outbound Market – Market Share

- Markets such as Canadian destinations outside BC, the US and Korea saw declines in market share between 1997/1998 and 2005/2006.
- In 2005/2006, Whistler, Banff and Europe accounted for 97% of Japan's total participants of overseas ski package tours.
- Overall, the market share of European ski tours has increased from 1997/1998 to 2005/2006, despite fluctuations in the interim. In 2005/2006, ski package tours to European destinations accounted for 35% of the total market, which was an 8 percentage point increase compared to 1997/1998.
- Whistler remains the no.1 destination for Japanese outbound skiers/snowboarders. Since 1997/1998, Whistler's market share peaked twice, attracting 58% of all outbound skiers/snowboarders in 1998/1999 and again in 2002/2003, but has gradually declined since 2002/2003. In 2005/2006, ski package tours to Whistler accounted for 49% of the total market, which was at the same level as in 1997/1998, but a 9 percentage point decrease compared to the peak years.

Table 6: Market share of overseas ski package tours from 1997 to 2006.

| | 97/98 | 98/99 | 99/00 | 00/01 | 01/02 | 02/03 | 03/04 | 04/05 | 05/06 |
|---------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Whistler | 49% | 58% | 51% | 50% | 52% | 58% | 52% | 53% | 49% |
| Other BC | 1% | 1% | 1% | 1% | 1% | 2% | 2% | 2% | 2% |
| Banff | 16% | 15% | 16% | 14% | 11% | 12% | 13% | 11% | 13% |
| Other Canada | 1% | 1% | 2% | 1% | 1% | 0% | 0% | 0% | 0% |
| America | 4% | 2% | 3% | 5% | 1% | 1% | 1% | 1% | 1% |
| Europe | 27% | 22% | 25% | 28% | 35% | 28% | 32% | 33% | 35% |
| Korea | 3% | 1% | 3% | 1% | 0% | 0% | 0% | 1% | 0% |

Source: Overseas Ski Package Tour Conference.

Section 2. Travel Trade Interview Findings

2.1 General Trends

MATURE CUSTOMER BASE

- Both the Japanese domestic and outbound travel trade have witnessed the aging of their customer base. Currently, clients of the outbound market are between 30 to 60 years of age, with a greater focus on the 40 to 50 age segment. Clients of the domestic market are currently between 20 to 40 years of age, with a greater focus on clients in their 40s.

“The average age is increasing 2 years every year.”

- Customers booking European ski tours are older (50s) than those booking Canadian ski tours (40s).
- Twenty percent of clients booking international ski travel are repeat customers while 80% are first timers when it comes to taking an overseas ski tour.

LACK OF YOUNG SKIERS/SNOWBOARDERS

- The lack of young skiers has been identified as the main factor contributing to the aging of the Japanese ski market.

“Many schools stopped organizing ski trips or ski activities. Children now have fewer opportunities to start skiing.”

“Unemployment rate of the younger generation is high and many of them can not afford to ski.”

“Time, money, and physical and spiritual energy are required to go skiing. The younger generation today does not have any of these.”

RISK OF OLDER SKIERS DISCONTINUING SKIING

- The Japanese travel trade felt that there have not been enough efforts made by the Japanese ski industry to ensure that skiers continue skiing as they age.

“During the heyday of the Japanese ski market, ski industries were devoted to making money and did not put any efforts to convey charms of ski experience to Japanese skiers and many skiers did not continue on skiing.”

2.2 Preferences of Travel Party Size

OUTBOUND MARKET

- The most common party size for outbound ski travel has always been 2 to 3 people. In addition, it has been observed that the proportion of solo travellers has increased recently.

“The ratio of skiers who participate in a ski tour by themselves has increased recently.”

DOMESTIC MARKET

- Family travel is strong for the Japanese domestic ski market as more families are participating in skiing.

“Couples, group of friends and families are the major units of customers.”

2.3 Destination Preferences

OUTBOUND MARKET

- Canada remains the most popular destination country for skiing/snowboarding yielding the majority of international bookings, followed by Europe and New Zealand.
- Whistler remains the most popular ski destination area due to its high level of awareness and effective product advertising.

“Most customers visit Whistler.”

“Only Whistler products are included in ski brochure while Banff products are included in general brochure.”

DOMESTIC MARKET

- In the domestic market, ski destinations near Tokyo are becoming popular (e.g. Joetsu), while further destinations are seeing a decline in customers (e.g. Tohoku).

2.4 Itinerary Preferences

OUTBOUND MARKET

- Popular travel itineraries usually range between 4 and 6 nights in duration. International travel agencies also felt that the length of stay was increasing.

“6 days and 4 nights itinerary ranks top followed by 7 days and 5 nights.”

“8 days and 6 nights itinerary ranks top (36%) followed by the 7 days and 5 nights itinerary.”

“The length of stay has been increasing recently.”

DOMESTIC MARKET

- The domestic ski market has seen an increase in same-day travel. The increase is possibly due to the development of highways in Japan which has allowed easier access to various ski sites. As a result, skiers have sufficient amount of time skiing and still have enough time to return to their homes.

“The ratio of same-day skiers has increased.”

“The domestic ski sites are not as crowded now as they used to be. Skiers can enjoy enough skiing within one day.”

- For multi-day ski travel, a weekend package (excluding Sunday) is the most popular itinerary.

“Typical itinerary is 2 days and 1 night starting from Friday. Most skiers leave the ski site on Saturday or early Sunday... few skiers ski on Sundays.”

2.5 Activity Preferences

- Off-piste skiing is more popular than demonstration skiing.

DIVERSIFIED WINTER ACTIVITIES

- Both the Japanese domestic and outbound markets have seen an increasing interest from skiers/snowboarders wanting to participate in alternative winter activities. The activities that become increasingly popular among the skiers include:
 - Heli-skiing (outbound)
 - Snowmobiling (outbound and domestic)
 - Fresh-track skiing (outbound)
 - Snowshoeing (domestic)
 - Snow tubing (domestic)

APRE SKI EXPERIENCE

- Aside from skiing/snowboarding and other winter activities, the Japanese skiers/snowboarders are also seeking other experiences such as staying in cities, enjoying nightlife, relaxing at hot springs or spas and dining.

“Vancouver stays, hot springs and Yakiniku (Japanese barbeque) are popular among skiers who visit Canada.”

“Most skiers leave the ski site at 3 or 4 o’clock and relax in a spa.”

- Language and/or cultural barrier might prevent the Japanese skiers/snowboarders from fully enjoying the experience.

“The Japanese skiers do not know how to enjoy a foreign bar and need some help and setup.”

2.6 Whistler's Competitive Advantage

PRICE, FLEXIBILITY, ACCESSIBILITY

- The cost of accommodations and airfare is seen to be reasonable, and there is more booking flexibility with Whistler products.

“The price of accommodation is reasonable for a 5 star hotel.”

“Airfare from Japan to Vancouver is relatively low, so Whistler is a good destination for travel planners to package products.”

“Travel agencies can only book European hotels on a per week basis, while Canadian hotels are more flexible.”

- Whistler is easily and quickly accessible by air. In addition, Whistler's proximity to Vancouver is seen to be an advantage.

“Good access from Japan. It does not take too long to fly to Vancouver compare to flying to European ski sites.”

“For skiers who want to enjoy both city and ski site, there are nice and sophisticated ski sites near Vancouver. Skiers can stay in Vancouver, enjoy shopping, eating, watching ice hockey games and skiing at the same time.”

DIVERSIFIED PRODUCTS

- Whistler is seen to be a comprehensive resort offering a wide array of activities. The availability of these extra activities is an added attraction of Whistler.

“We would like to make available not only winter products but also summer products next year.”

“Whistler is a robust resort destination where travellers can experience skiing as well as other activities such as canoeing and mountain biking around May.”

“Whistler is a comprehensive resort and travellers will not feel any inconvenience in shopping, dining and drinking.”

“There are other activities to enjoy such as watching NHL.”

2.6 Whistler's Competitive Advantage (continued)

FACILITIES, AMENITIES, SERVICES

- The layout of Whistler is seen to be ideal, leading to a more relaxing experience.

“Circulation planning of Whistler is perfect and skiers can enjoy skiing stress free.”

“Whistler is a new resort where slopes are planned well.”

“Quality of streetscape, landscape and accommodations is superior to that of Japanese ski sites.”

- The facilities, including Japanese staff in Whistler, are attractive to first-time and older skiers.

“Whistler has a condition to reduce anxiety for first-timers, such as many staff who understand Japanese.”

“Good access and nice facilities would attract first-timers and elder skiers.”

“It is a good place for the young generation and first timers to experience overseas skiing.”

- Satisfaction level of customers and travel trade towards Whistler is high which is crucial for motivating repeat visitation.

“Satisfaction of customers who have visited Whistler is high and they tend to become repeat visitors.”

2.7 Barriers to Visit Whistler and/or Canada

PRICE

- Prices for ski tours to Canada are seen to be increasing which could be a barrier to travel to Canada.

“The average price of ski tours to Canada is increasing and people can not visit Canada for skiing as casually as they used to...”

- A possible impact of price increases is that Japanese skiers will have higher expectations when skiing in Canada.

“One thing which could be a negative factor is the price increase to Canada... skiers could feel a gap to their expectations.”

- Due to the price increase, profit margin of Canadian ski products is low. As a result, international travel agencies are likely to be more passive when it comes to selling Canada as a ski destination.

LACK OF HISTORICAL ATTRACTIONS

- Older skiers are attracted to European ski sites because Europe has more historical sites.

“Compared with European ski sites, Whistler has less historical value and can not attract older skiers.”

2.8 Current Trends of Japanese Ski Travel Media

- Ski magazine readers are mostly based in Tokyo, Osaka, Nagoya and Hokkaido. Most readers are in their late 30s to early 40s, a majority of which are male.
- The annual number of magazine volumes being published has dropped.

“Seven volumes were published per year during the 80s, but currently, only 2 volumes are published annually.”

- Ski magazines are specializing to reflect the segmentation of skiers' needs.

“The categories of ski magazines are increasing along with segmentation of skier needs.”

“Skiers' needs have segmented and it is hard to focus on a general reader.”

- Ski magazines do not target new skiers in an effort to maintain the readership of more advanced skiers.

“All ski magazines have targeted advanced skiers to maintain their readership base. There are no ski magazines for someone who wants to start to ski.”

Section 3. Focus Group Findings

3.1 Motivations for Skiing/Snowboarding

- According to the focus group participants, there are numerous qualities of skiing that make it attractive. Most common qualities include:
 - Sense of achievement resulting from improvement of skills (especially important to the *older group*);
 - The ability to see spectacular mountain scenery that is not a part of everyday life in Japan (especially important to the *older group*);
 - The desire and excitement to see snow (especially for people who live in an area without snow);
 - Thrills, exhilarations and the feeling of wind caused by high speed;
 - Social aspects of skiing such as pleasure derived from getting together and having fun with friends and family, and maintaining rich contacts with children by skiing with children (especially important to the *family group*);
 - The enjoyment of after-ski activities such as relaxing at hot springs and having gourmet meals (especially important to the *family group*).

3.2 Non-Participation and Triggers for Resuming Skiing

- Older skiers feel that their strength has declined or that they are too busy with work, therefore skiing is low on their list of priorities.

TRIGGERS FOR RESUMING SKIING

- Certain visuals will trigger a desire for skiing and older skiers are likely to take up skiing (again) after retirement.

“When I was zapping TV channels a couple of years ago, I came across a how-to-ski program and thought of skiing again. I have been enjoying skiing every winter ever since.”

“My son visited the Swiss Alps for his honeymoon to ski. When I saw the video which my son took on site, I felt like I must go and ski there someday. I don’t have enough time now because I am still working, but I will visit Switzerland for skiing after my retirement.”

- For family skiers, once the children get past the toddler stage, parents will have more opportunities to enjoy doing activities with them. At the same time, parents will start providing their children with “emotional education, which includes getting “close to nature.” As the children became older and more experienced with skiing, family skiers would begin thinking about an overseas ski trip.

“We go skiing every year because we want our children to be exposed to winter nature. When our children were small, we only played with sled or snow balls, but now my children became school age and can ski well, we are thinking about travelling overseas to ski.

- Some families do recognize the advantage of travelling with young children, as it does not cause huge incremental costs.

“We are thinking about visiting overseas for skiing before our youngest child turns 2 years old because bringing a young child doesn’t increase the travel cost that much.”

3.3 Domestic Ski Destination Preferences

- Older skiers tend to try new ski sites every year. Their criteria for choosing ski sites include:
 - Enjoying skiing in a new location
 - Slopes are well groomed and safe
 - Slopes are easy enough for them to ski

- Family skiers on the other hand are likely to choose familiar ski sites because they know it is safe to take their children there and they will not have to worry about them. Their criteria for choosing ski sites include:
 - Understanding how the lift lines work
 - Easy-to-find meeting spots.
 - Familiar accommodations with flexible services

3.4 Other Considerations for Domestic Skiing

POPULAR ITINERARY

- A popular itinerary for older skiers is 3 days and 2 nights, with 1 – 1.5 days of skiing time. Older skiers like to have time to relax and therefore they would limit time on slopes in order to have time to relax at hotel.
- A popular itinerary for family skiers is 2 days and 1 night, with 1 -1.5 days of skiing time. Family skiers would like to have more than 1 day of skiing with their children, although they have shorter length of stay at the ski site. They tend to return home on Saturday night or Sunday morning in order to have some time to recharge before the new week begins.

SKI RENTALS

- Most of the focus group participants were receptive towards renting ski boards. However, they generally prefer using their own ski boots and ski wear.
- Older skiers still have a negative perception towards rental skis from when they were young – equipment was old and limited. However, they became more receptive when they were informed about the availability and quality of rental equipment.
- Compared to elder skiers, family skiers are more receptive to using rental equipment as it allows them to bring large suitcases with their children's “stuff “.

3.5 Perceptions of Overseas Skiing

- Older skiers perceive overseas to be a place to enjoy off-piste and backcountry skiing while family skiers perceive overseas to be a place for skiing on groomed slopes, similar to Japanese ski sites.
- For both older and family skiers, the attractions for skiing overseas are the magnitude of space, the scenery and atmosphere that are not seen in Japan.
- Older skiers perceive that only advanced skiers can ski at overseas ski sites and therefore the major barrier for them to go overseas for skiing is their anxiety. For this reason, older skiers appreciate having a ski guide so that their anxiety about skiing overseas is alleviated.
- The main challenge for family skiers is that they are too busy with work to take long holidays. They do not have the same anxiety about overseas skiing as the older skiers. As a result, family skiers are less receptive towards having a guided ski tour - having detailed information about the overseas ski sites is sufficient enough to make them feel comfortable.
- For both older and family skiers, top of the mind overseas ski destinations are Switzerland and Canada.

3.6 Perceptions of Overseas Ski Destinations

CANADA

- For older skiers, Canada is associated with large-scale ski sites and renowned sites for skiing/snowboarding. Family skiers perceive Canada as a place of marvels of nature such as Aurora and the Rockies.

EUROPE

- For both older and family skiers, European ski sites are where skiers/ snowboarders can enjoy long distance skiing, great scenery, luxurious atmosphere and deep history. European ski sites have a special attraction to the older generation in Japan.

NEW ZEALAND

- Older skiers associate New Zealand with heli-skiing. However, when it comes to imagery of the country, sheep and idyllic scenery are most common. Family skiers do not have an image of New Zealand as a destination to ski.

THE UNITED STATES

- Most of the focus group participants have images of the big cities of the US such as New York and Los Angeles; however they do not see the US as a place to ski.

3.7 Preferences of Overseas Ski Trip

- In general, the most popular way to go on an overseas ski trip is through a package tour which lasts one week in duration.
- In addition to skiing/snowboarding, skiers put importance on a variety of other activities such as:
 - Alternative snow activities
 - Shopping
 - Gourmet dining
 - Sightseeing
 - Relaxing at hot springs
 - Visiting historical or world heritage sites
 - Excursion to surrounding cities that are within 1 - 2 hours drive from the ski site.

3.8 Motivations for Visiting Canada and/or BC

- Most of the focus group participants perceive Canada to be a destination country offering unique opportunities to enjoy backcountry skiing, rail tours, gourmet dining. They perceive Whistler as a resort with good facilities for both summer and winter season.

ATTRACTION OF A 'WINTER RESORT'

- Major attractions of a winter resort for skiers differ by gender.
 - Male skiers are more focusing on enjoying winter sports
 - Female skiers are generally more likely to be attracted by the ambience of a resort, Christmas market and illumination.
- Depending on age, expectations of a winter resort are also likely to differ.
 - Older skiers see winter resort in a much more defined scope i.e. a place for skiing after which it is preferred that they stay at cities such as Vancouver for one or two days.
 - Family skiers, on the other hand, see winter resort in a much broader sense. At a winter resort, they expect to enjoy a variety of snow activities, relaxing at a spa, shopping and staying at a nice accommodation.

GENERAL PREFERENCES

- Older skiers are attracted by ski related activities such as backcountry skiing, guided skiing and skiing at the Olympic courses
- Male family skiers like to experience winter sports such as ice hockey, snowmobiling. They prefer staying at a condominium where family members can stay together.
- Female family skiers are interested in alternative activities such as snow shoeing and shopping.
- Popular winter sporting events for speculating at ski sites include figure skating, snowboarding, free style skiing and alpine skiing.

PRODUCT PREFERENCES – STRONG MOTIVATOR

- **Snow programs for children:** Older skiers are interested in visiting overseas ski sites with their grandchildren. These programs interest family skiers because they are seen as part of the 'emotional education' for their children. An added benefit of having children participant in the program is that parents could enjoy some free time.
- **Backcountry skiing:** For older skiers, backcountry skiing is the activity they dreamed of doing since they were young. The only barrier is their lack of confidence in their skills for skiing. Family skiers with more advanced skills are interested in backcountry skiing.
- **Ice Hockey (esp. for male):** Male skiers have a strong interest in watching NHL.

3.8 Motivations for Visiting Canada and/or BC (continued)

- **Accommodation:** Male skiers are interested in staying at a condominium. Female skiers have a feeling that they have to cook if they stay at a condominium and therefore tend to avoid such a choice of accommodation.
- **Canadian nature:** For older skiers, although it is hard for them to imagine enjoying the Canadian winter besides skiing, they are interested in experiencing nature in Canada. Family skiers respond positively towards nature experiences in Canada.
- **Whistler:** Older skiers see Whistler as an ideal report because it is a well setup town providing a variety of services (hence stress-free). Family skiers are interested in staying at Whistler for 1 to 2 weeks, enjoying shopping at local markets.

PRODUCT PREFERENCES – MEDIUM MOTIVATOR

- **Additional activities:** For both older and family skiers, their main purpose is to enjoying skiing but would like to see the availability of activities as additional benefits.
- **Gourmet dining:** Gourmet dining does not stand out as a unique attribute for Canada. Nevertheless, both older and family skiers are interested in enjoying local food during their travel.
- **Sightseeing:** Both older and family skiers are interesting in sightseeing although having some concerns over time spent on sightseeing.

PRODUCT PREFERENCES – WEAK MOTIVATOR

- **Christmas illumination:** Christmas illumination, although attractive, is not sufficient to motivate travellers to visit.
- **Aesthetics / Spa:** Older skiers have high interest in hot springs, but they regard spa / aesthetics as for women. Female family skiers have high interest in spa / aesthetics and male family skiers view these services positively as benefits for their wives.
- **Olympics:** Both older and family skiers have an interest in watching the Olympic Games on site. However, they have less interest in skiing at the ski site where the Olympics are going to be held.
- **Guided ski tour:** Older skiers have anxiety in skiing overseas and would like to be guided during skiing. Family skiers have a certain level of knowledge about overseas ski sites and do not think a ski guide is necessary.
- **Ski sites near Vancouver:** Most of the focus group participants have little interest in visiting ski sites near Vancouver, as they prefer large-scale ski sites that are different from those in Japan.
- **Vancouver:** Awareness of Vancouver is high and it is regarded as one of the main destinations for overseas travel.
- **Victoria:** Awareness of Victoria is low.

3.9 Impact of the 2010 Olympics

- Compared to family skiers, older skiers are more interested in the 2010 Olympics and are more interested in both skiing at the site where Olympics are held and watching the Games on site. They have a positive impression of Canada and Vancouver and could be triggered to visit during or after the Games.
- Overall, family skiers are less interested in the 2010 Olympics. They have an impression that the Olympic courses are only for athletes. Their interest level could be raised if the misunderstanding is clarified.

3.10 Sources of Information

- According the focus group participants, there are several sources that are likely to spark their interest in skiing such as,
 - TV programs
 - Travel magazines
 - Hanging posters
 - Word of mouth from a person who has recently skied
 - Word of mouth from a friend who is knowledgeable about skiing
- When these interests evolve into stronger desire, they start searching the Internet for more detailed information on ski destinations, accommodation and gourmet dining etc.
- Ski magazines:
 - None of the older skiers (in the focus group) were currently reading ski magazines, as they feel the content is too technical (They used to read ski magazines when they were younger).
 - Family skiers (in the focus group) read ski magazines on a regular basis to help them choose a family ski destination.

Section 4. Consumer Survey Findings

Cautionary Notes

The incidence of the eight groups of respondents among all skiers/snowboarders, or among skiers/snowboarders with an interest in overseas travel was not determined during the fieldwork or screening process. Therefore responses of the eight groups cannot be validly combined, since it can not be determined what proportion of the overall target market a particular respondent group (e.g. 20 to 29 year old females) actually represents.

To rectify the limitation aforementioned, six respondent segments were created to examine the research results through different perspectives including,

- Male vs. Female
- Under 40 years old vs. 40 years and older
- Beginner skier/snowboarder vs. Intermediate-Advanced skier/snowboarder
- Have been to Canada vs. Have not been to Canada
- Frequent overseas traveller (i.e. travelled overseas 6 times or more) vs. infrequent overseas traveler (i.e. travelled overseas 1 – 5 times)
- Recent skier/snowboarder (i.e. have participated in past 3 years) vs. Non-recent skier/snowboarder (i.e. have not participated in past 3 years)

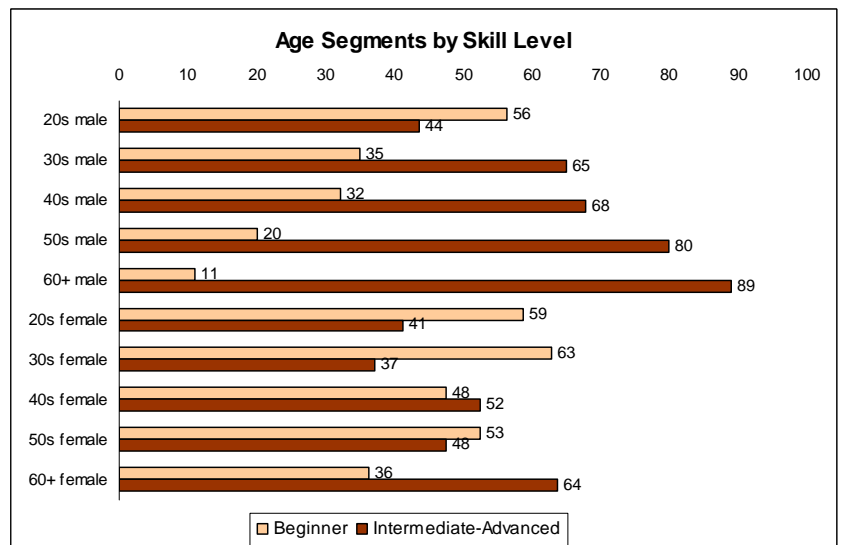
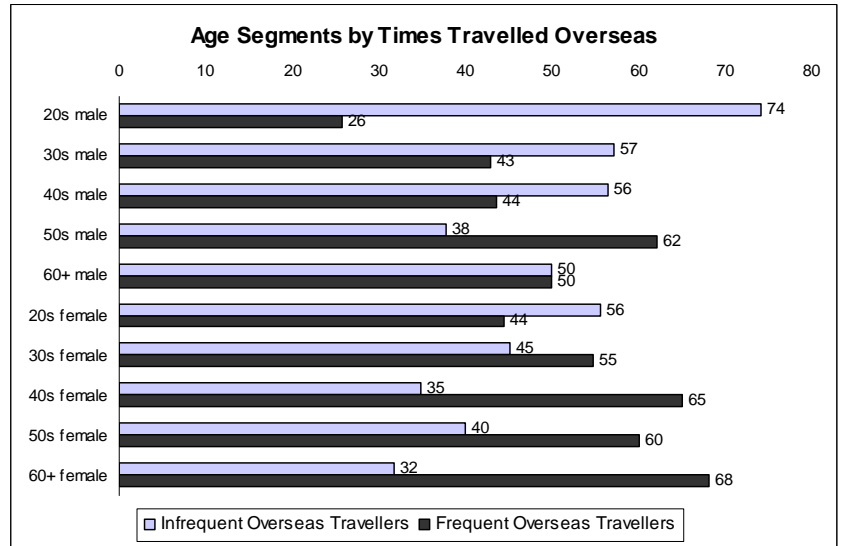
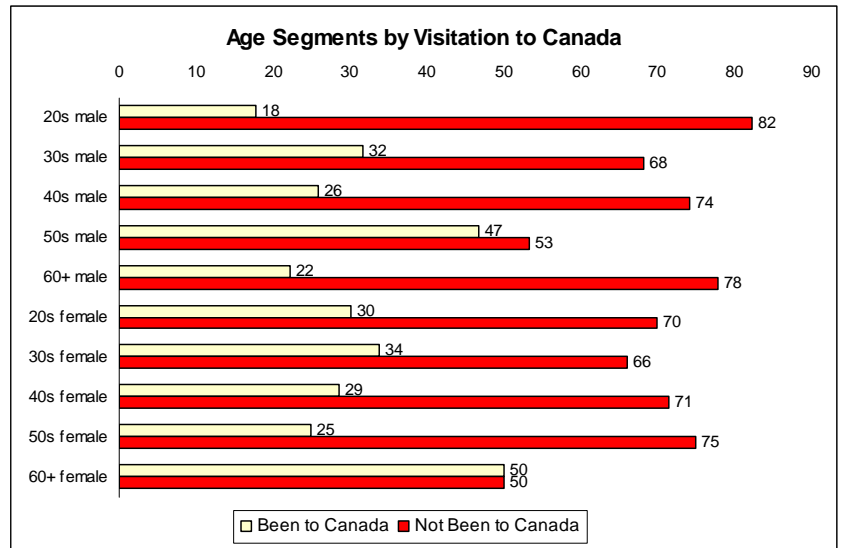
For each question, if there are substantial differences in the responses of different segments, these differences among the segments are presented in the report. In cases where there are only minor differences in the responses of different segments, only the overall results of the entire sample are reported.

In addition, caution is advised that the survey respondents were selected from four major areas of Japan. Therefore the results presented in this report only represent those respondents in Tokyo, Osaka, Nagoya metropolises or Hokkaido.

4.10 Socio-Demographics of Survey Respondents

Age Segment

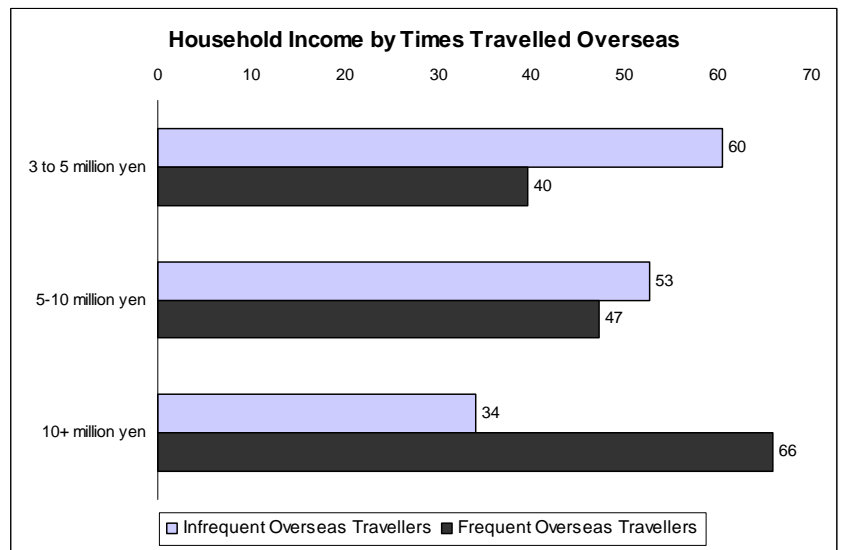
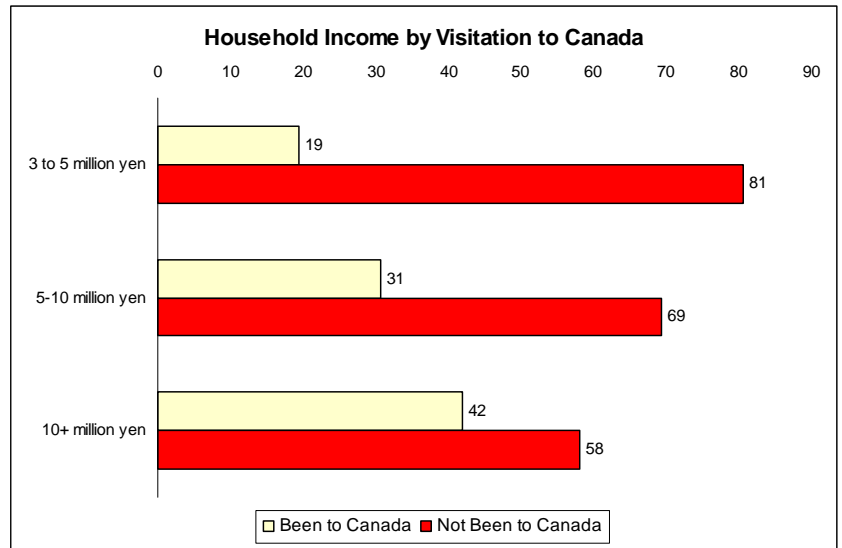
- The majority of male respondents in their 20's, 30's, 40's and 60's had not been to Canada in the past. For male respondents in their 50's, almost half had previously visited Canada.
- Similarly, the majority of female respondents between the ages of 20 to 59 had not been to Canada in the past. For female respondents in their 60's, half had previously visited Canada.
- Female respondents over the age of 30 were more likely to have travelled overseas frequently.
- Male respondents in their 50's were more likely to have travelled overseas frequently. Male respondents in their 20's were far less likely to have travelled frequently to overseas destinations.
- Male respondents over the age of 30 and female respondents in their 60's were more likely to have intermediate/advanced skill levels for skiing.
- Male respondents in their 20's and female respondents in their 20's and 30's were far less likely to have acquired intermediate/advanced skill levels for skiing.



4.10 Socio-Demographics of Survey Respondents (continued)

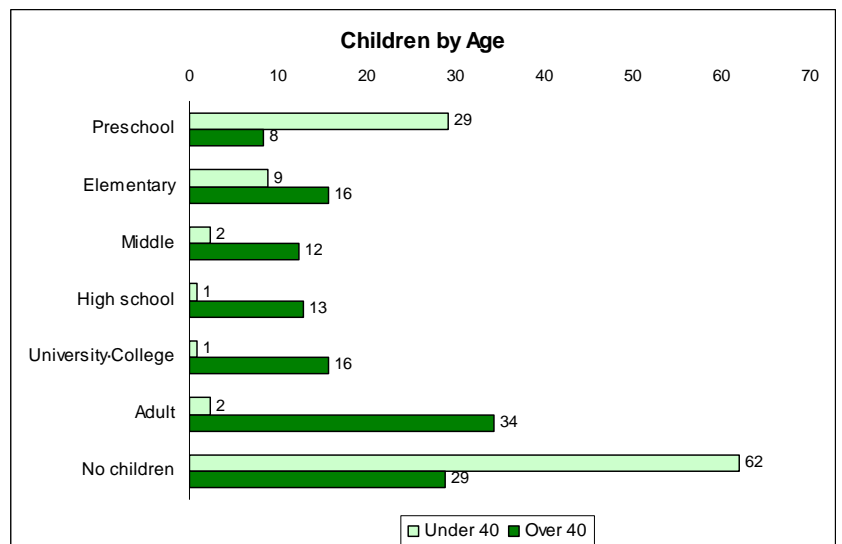
Household Income

- Nearly a third of the respondents who came from middle income households (5 to 10 million yen per year) and almost half of the respondents with higher incomes (10+ million yen per year) had been to Canada in the past.
- Two thirds of the respondents who came from high income households (10+ million yen per year) had travelled frequently to overseas destinations.



Children

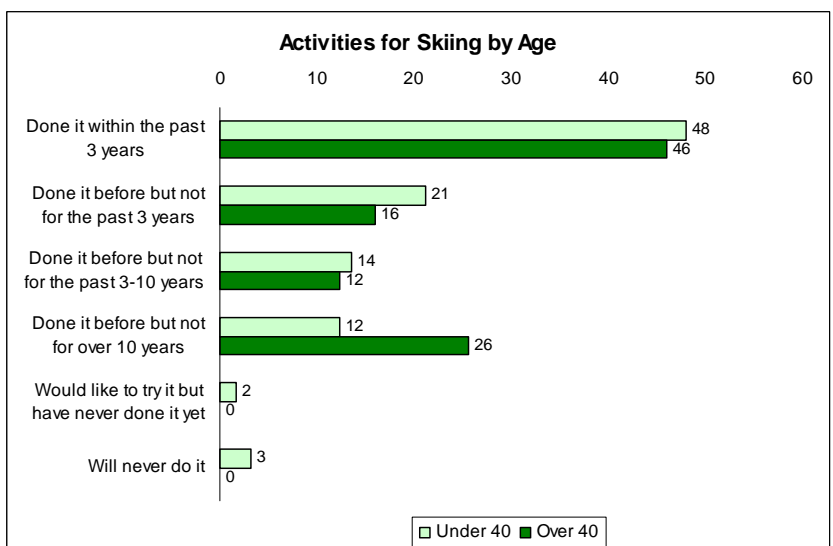
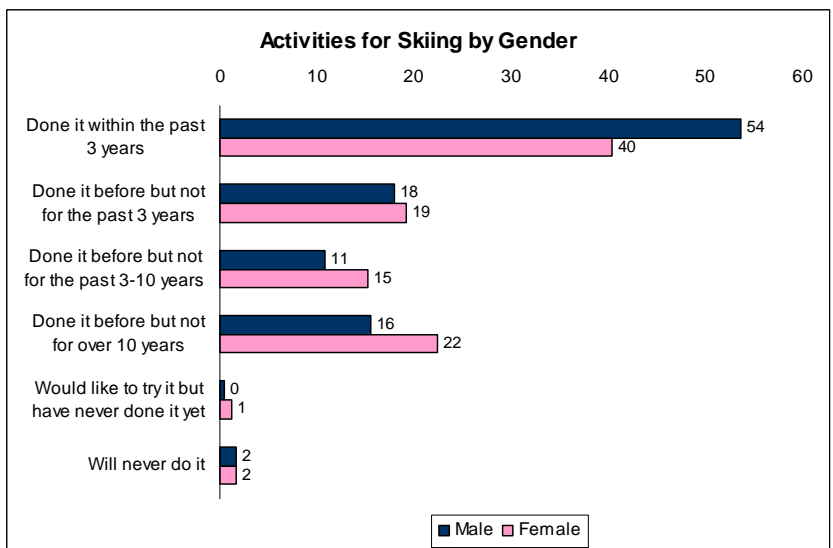
- Younger respondents were more likely to have no children, or to have children that were in preschool whereas older respondents were more likely to have adult aged children, as well as children in elementary, middle, high school and college/university.
- It is interesting to note that over a quarter of the older respondents did not have children.



4.11 Skier/Snowboarder Behaviour

Participation in skiing:

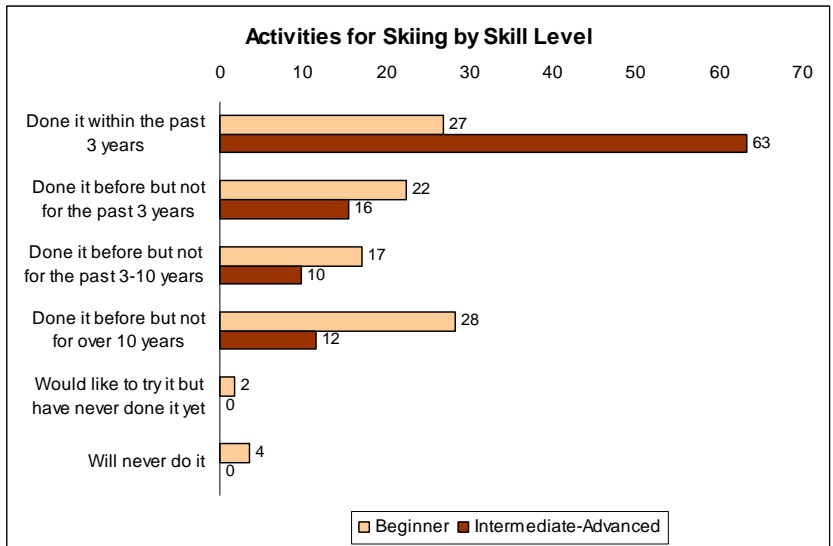
- Respondents were asked about their participation in skiing. Responses differed substantially by prior visitation to Canada, gender, age, and skill level but not by frequency of overseas travel or recency of skiing/snowboarding.
- Compared to those who had not been to Canada, respondents who had visited Canada were more likely to have skied within the past three years.
- Compared to female respondents, male respondents were much more likely to have skied within the past three years.
- Compared to their younger counterparts, older respondents who had skied in the past were more likely to have been off the slopes for over 10 years.



4.11 Skier/Snowboarder Behaviour (continued)

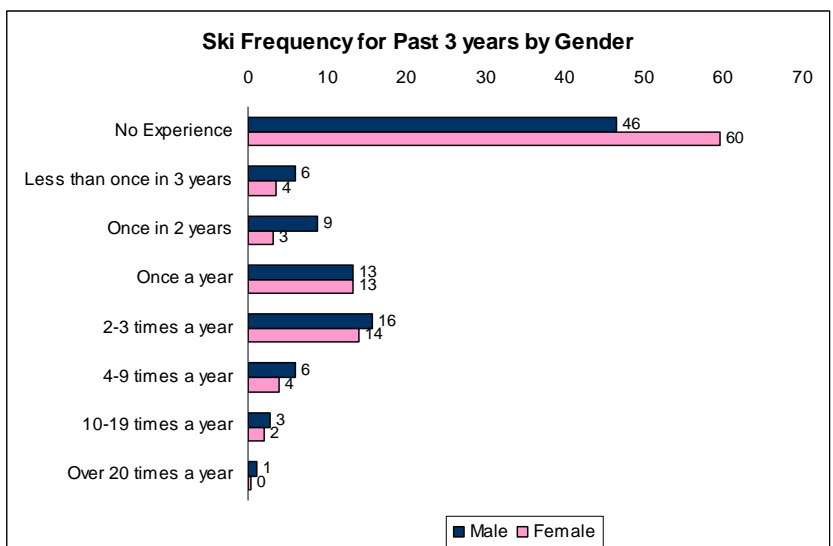
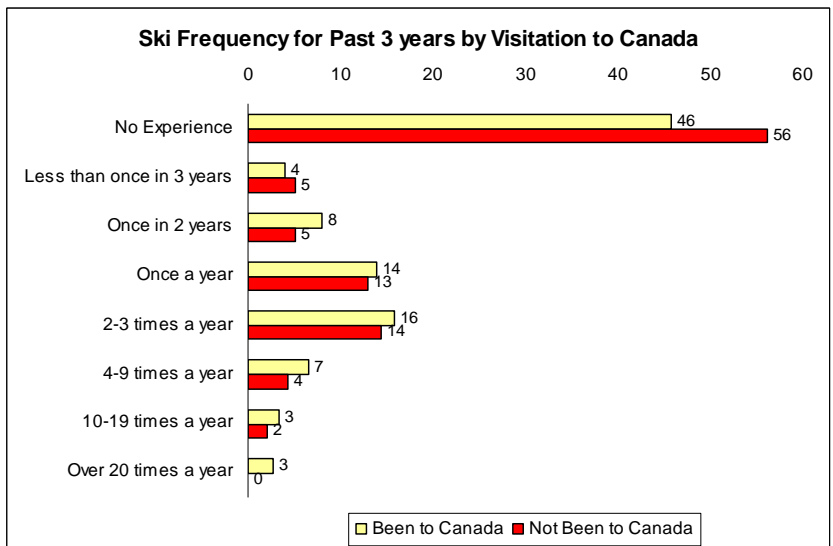
Participation in skiing: (continued)

- Respondents with intermediate-advanced skill levels were much more likely to have participated in skiing within the past three years whereas respondents with beginner level skills who have skied in the past were more likely to have been off the slopes for the past 3 or more years.



Frequency for the past 3 years:

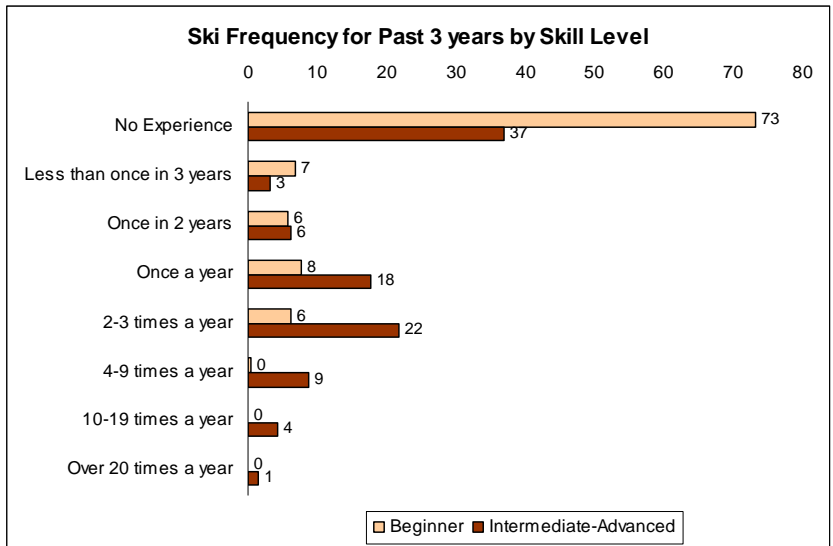
- Respondents were asked about their frequency of skiing over the past three years. Responses differed substantially by prior visitation to Canada, gender and skill level but not by age, frequency of overseas travel or recency of skiing/snowboarding.
- Respondents who had not been to Canada were more likely to have limited or no experience skiing compared to those that had visited Canada in the past.
- Compared to their male counterparts, female respondents were much more likely to have had no experience skiing in the past three years.



4.11 Skier/Snowboarder Behaviour (continued)

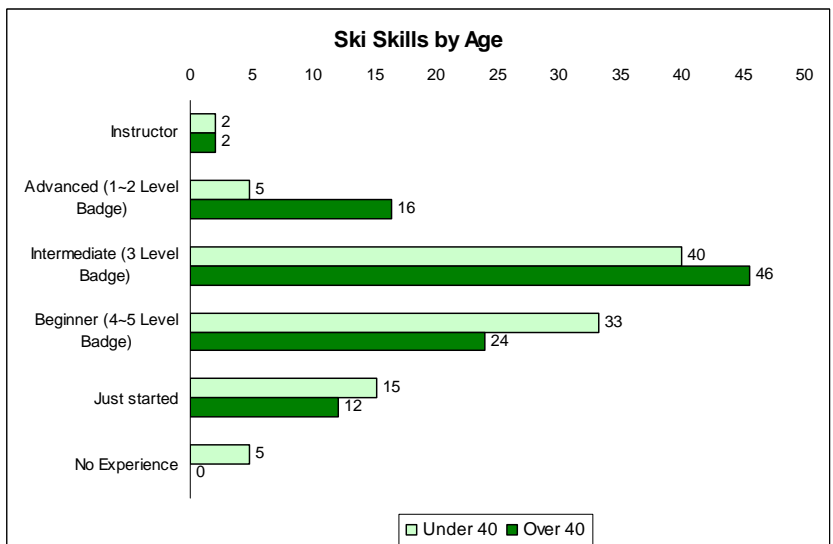
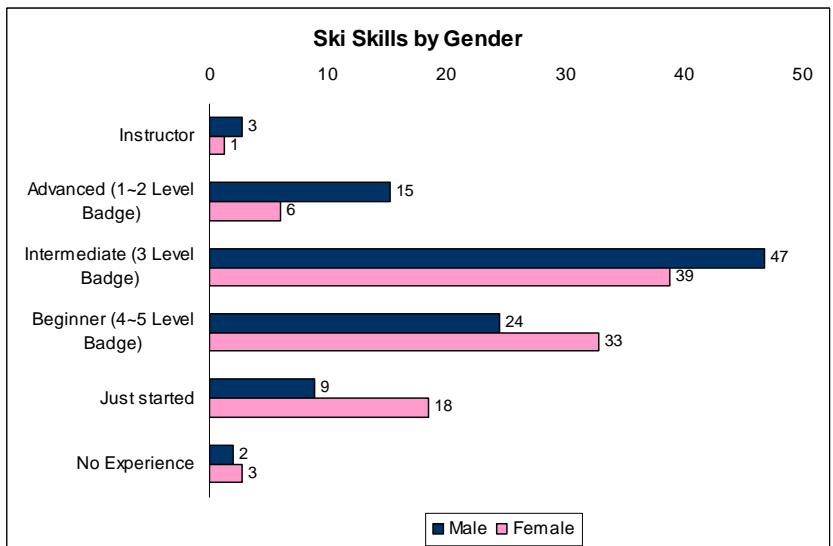
Frequency for the past 3 years: (continued)

- A majority of beginner level skiers had not experienced any skiing in the past three years.
- More than a third of intermediate/advanced level skiers had also been away from the slopes in the past three years.



Ski Skills:

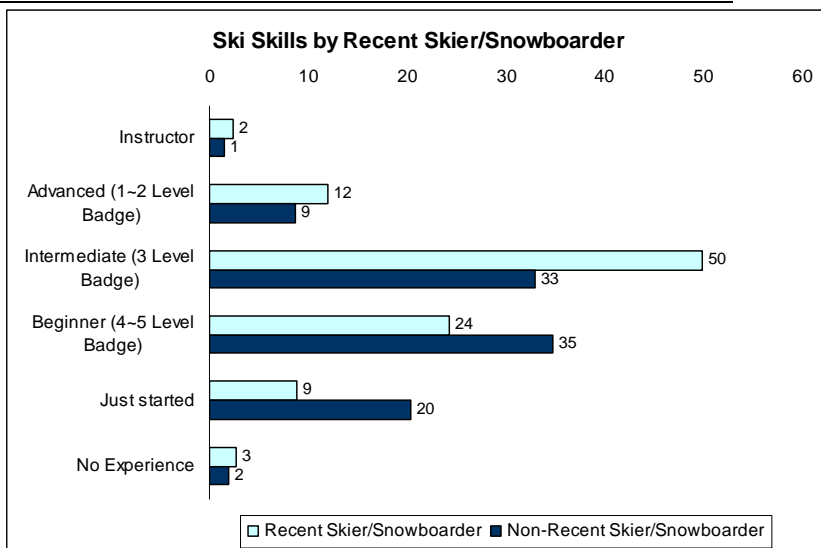
- Respondents were asked about their skill levels. Responses differed substantially by gender, age and recency of skiing/snowboarding but not by prior visitation to Canada or frequency of overseas travel.
- Male respondents were more likely to have acquired higher skill levels than did their female counterparts.
- From an age perspective, older respondents had higher skill levels than did those who were younger.



4.11 Skier/Snowboarder Behaviour (continued)

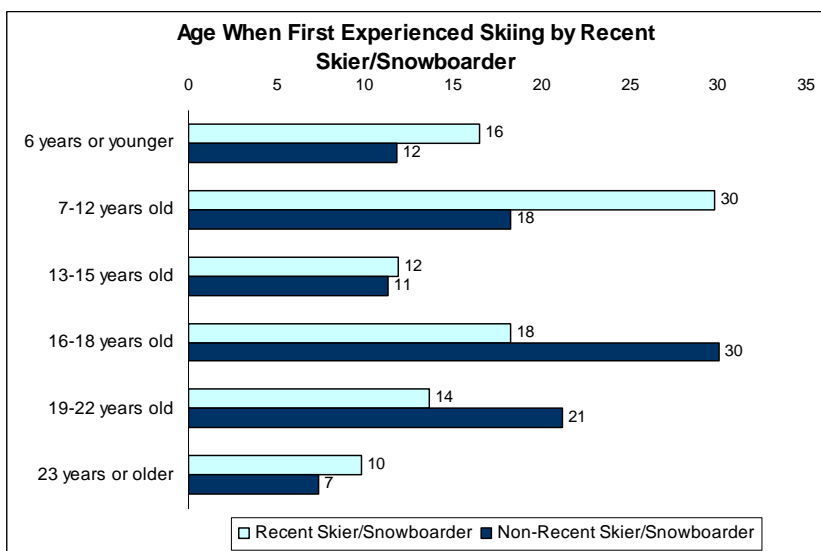
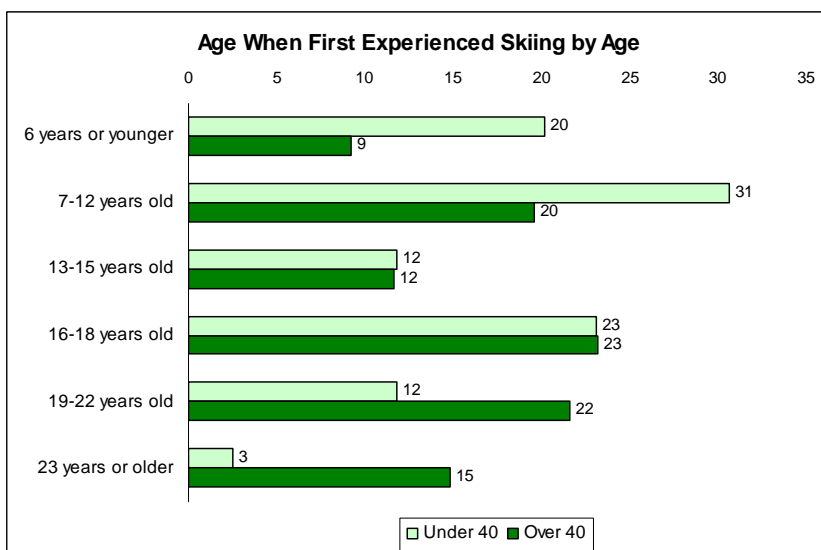
Ski Skills (continued)

- Recent skiers/snowboarders tended to be more experienced than those who had yet to start skiing/snowboarding or who had been away from the slopes for 3 or more years.



How old were you when you first experienced skiing?

- Respondents were asked about the age at which they first experienced skiing. Responses differed substantially by age, recency of skiing/snowboarding and skill level but not by prior visitation to Canada, gender or frequency of overseas travel.
- Respondents were introduced to the sport at a variety of ages.
- Respondents who were under the age of 40 were much more likely to have started skiing when they were 12 or younger whereas older respondents were more likely to have started skiing after the age of 15.
- Recent skiers/snowboarders were much more likely to have picked up the sport when they were 12 or younger compared to those who had not skied or snowboarded recently.

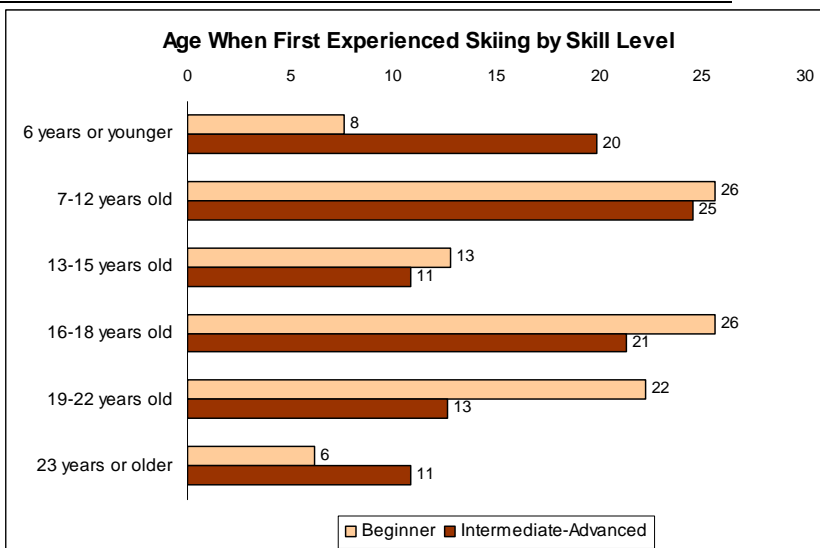


4.11 Skier/Snowboarder Behaviour (continued)

How old were you when you first experienced skiing?

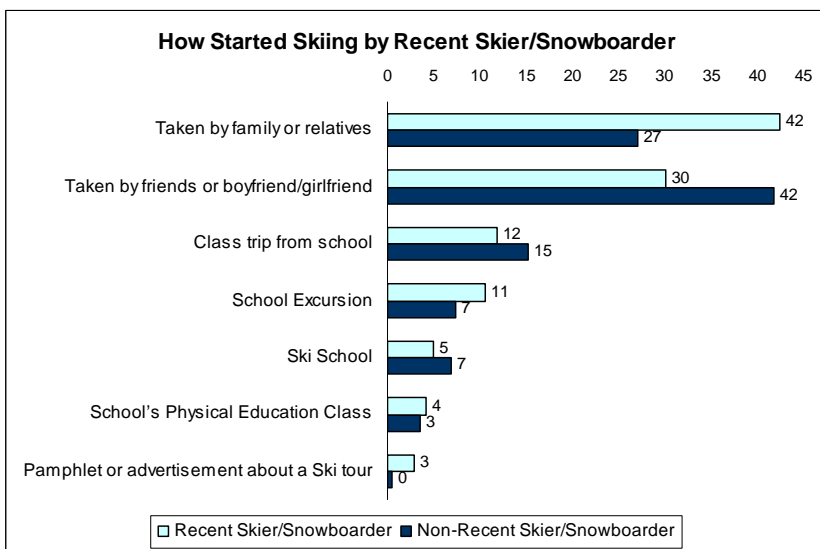
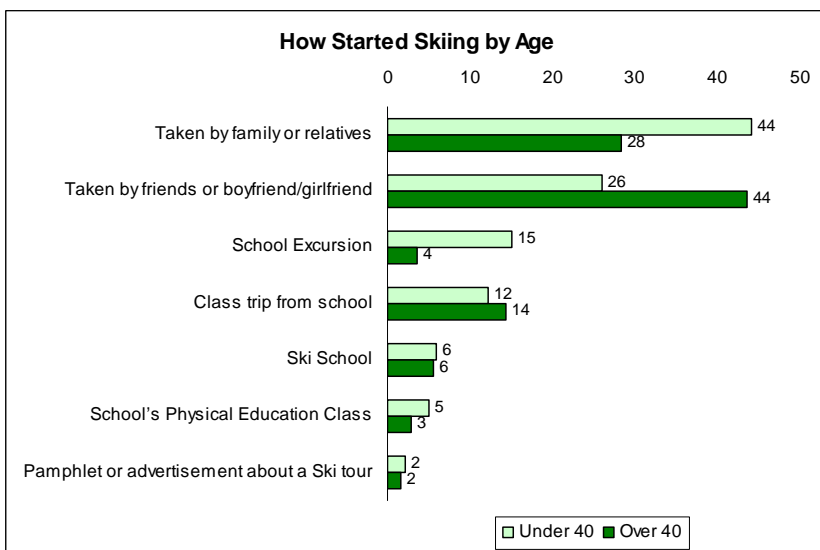
(continued)

- Experienced skiers were much more likely to have started skiing in their pre-teen years. A higher proportion of beginners took up the sport after the age of 18.



How did you start skiing?

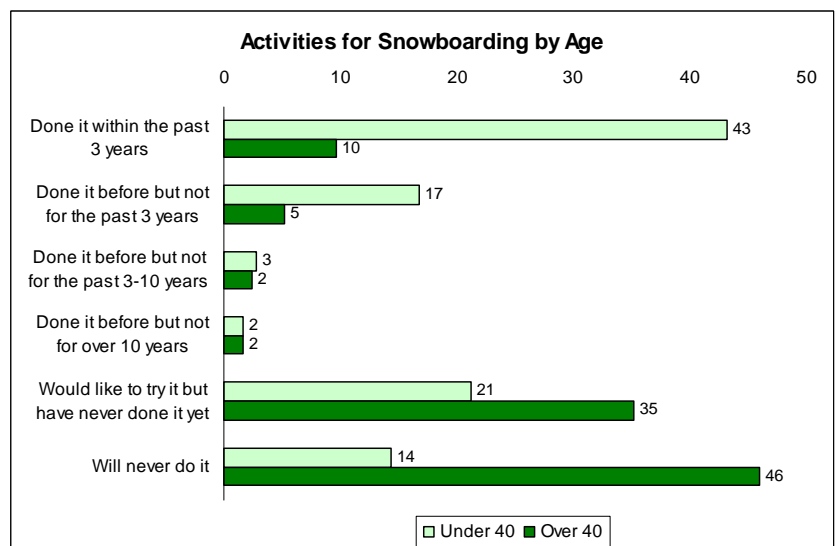
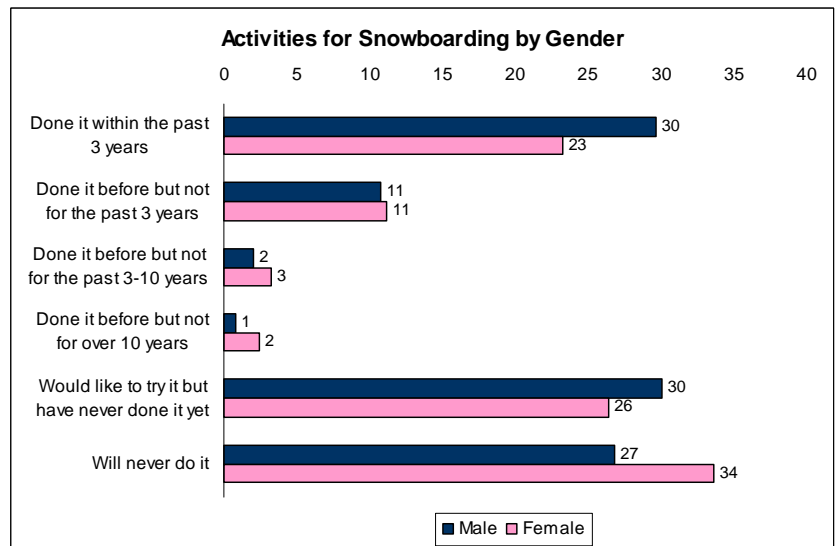
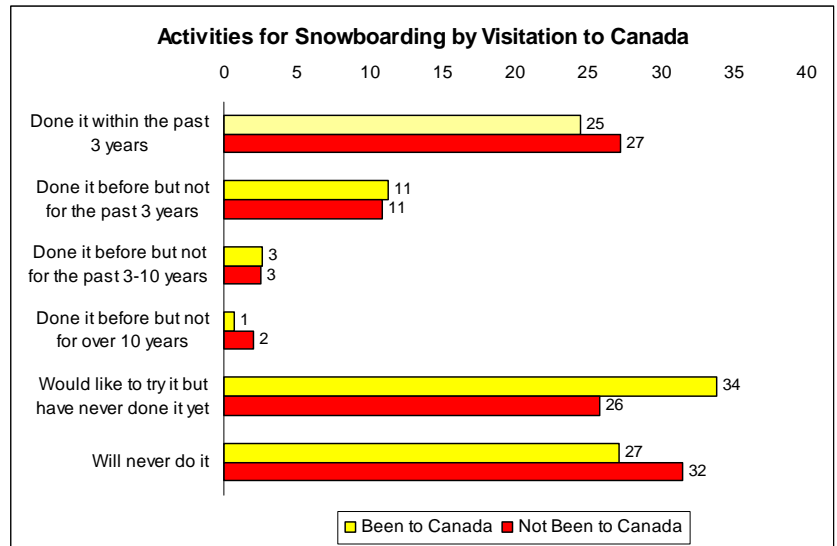
- Respondents were asked about how they were introduced to skiing. Responses differed substantially by age and recency of skiing/snowboarding but not by prior visitation to Canada, gender, frequency of overseas travel or skill level.
- Frequent responses included family/relatives, friends, class trip from school and school excursion.
- Younger respondents were much more likely to have been introduced to the sport by family/relatives whereas friends (including boyfriends and girlfriends) were more influential on those who were older.
- Recent skiers/snowboarders were much more likely to have been introduced to the sport by family/relatives whereas friends (including boyfriends and girlfriends) were more influential on those who had not skied or snowboarded recently.



4.11 Skier/Snowboarder Behaviour (continued)

Participation in Snowboarding

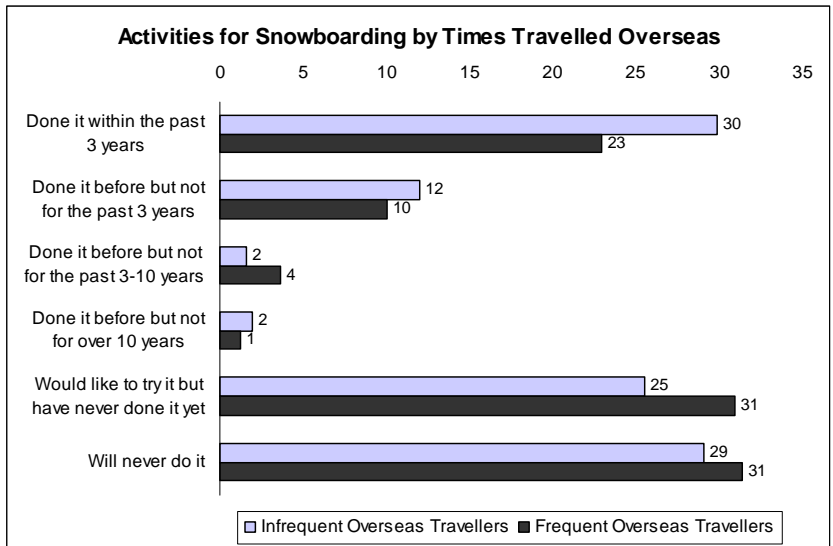
- Respondents were asked about their participation in snowboarding. Responses differed substantially by prior visitation to Canada, gender, age and frequency of overseas travel but not by recency of skiing/snowboarding or skill level.
- A higher proportion of respondents who had previously visited Canada expressed an interest in trying snowboarding for the first time whereas a higher proportion of those who had not been to Canada indicated they would never do it.
- A higher proportion of male respondents were likely to have snowboarded within the past three years whereas a higher proportion of female respondents indicated they would never try this sport.
- Younger respondents were much more likely to have snowboarded within the past three years whereas those who were older were much more likely to indicate that snowboarding was something they would never try.



4.11 Skier/Snowboarder Behaviour (continued)

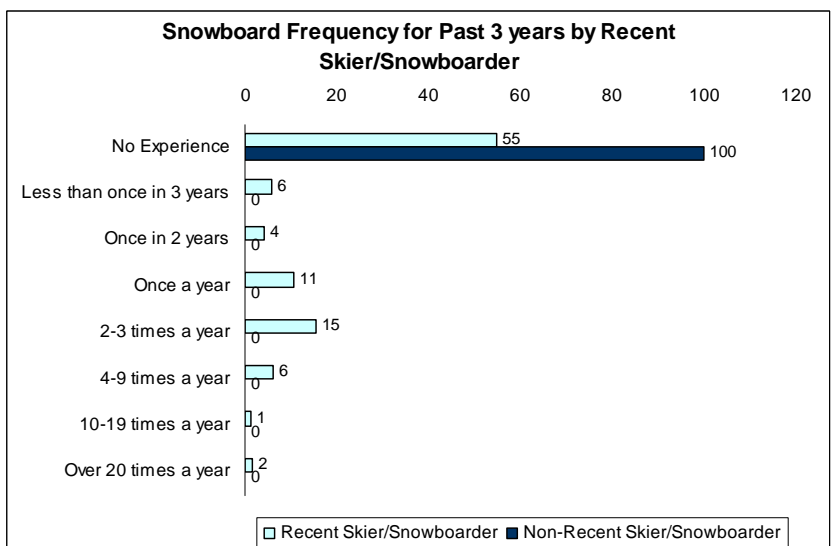
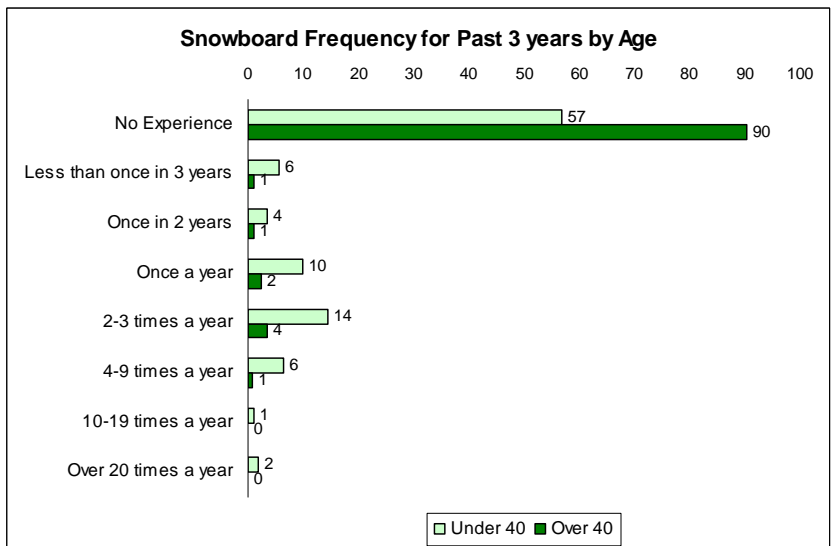
Participation in Snowboarding (continued)

- Infrequent overseas travellers were more likely to have snowboarded within the past three years.
- A majority (62%) of those who travelled overseas more often had never participated in snowboarding. Nearly a third (31%) expressed an interest in trying it for the first time.



Frequency for the past 3 years:

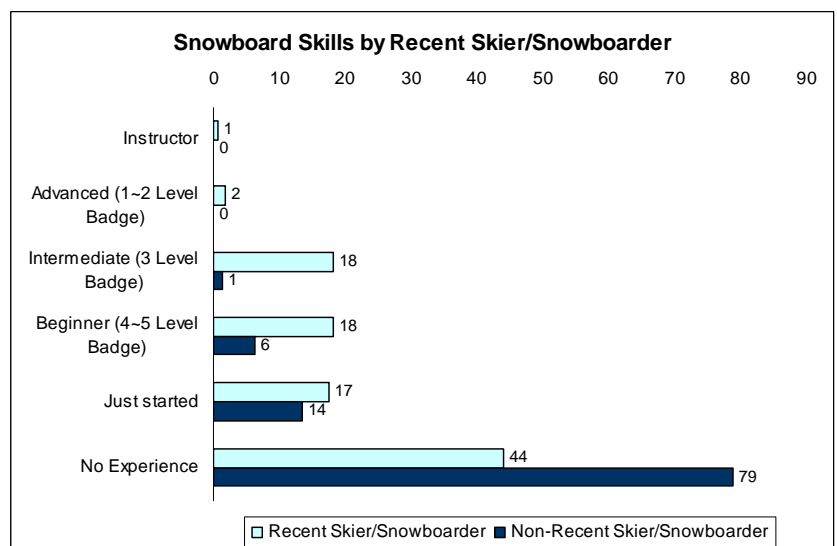
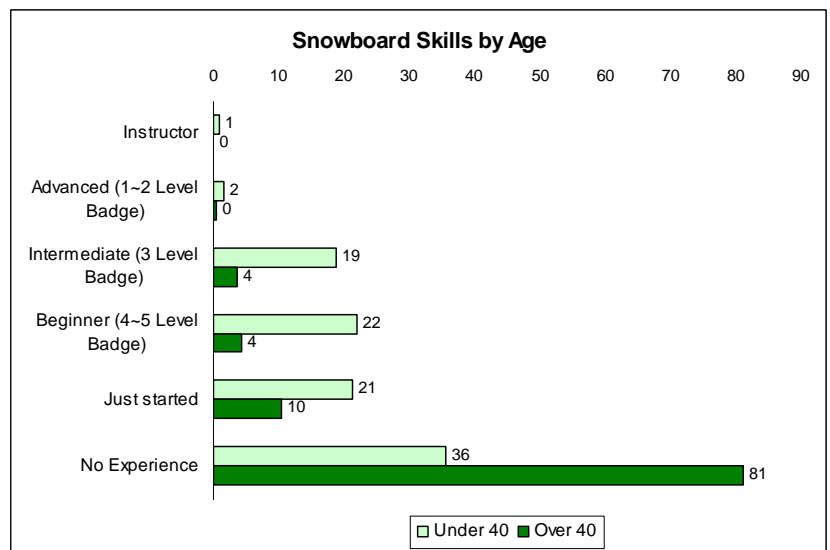
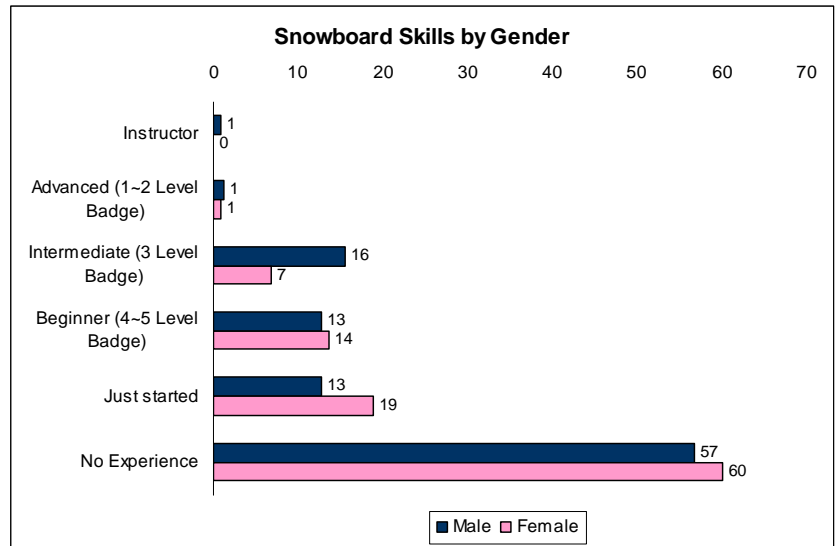
- Respondents were asked about their frequency of participation in snowboarding over the previous three years. Responses differed substantially by age and recency of skiing/snowboarding but not by prior visitation to Canada, gender, skill level or frequency of overseas travel.
- The majority of older respondents and a high proportion of younger respondents had not participated in snowboarding within the past three years.
- A third of the younger respondents snowboarded at least once during the year.
- For respondents who had not skied/snowboarded in the past three years, none had experienced the sport of snowboarding. Among recent skiers/snowboarders, over a third went snowboarding on at least one occasion during the year.



4.11 Skier/Snowboarder Behaviour (continued)

Snowboard Skills:

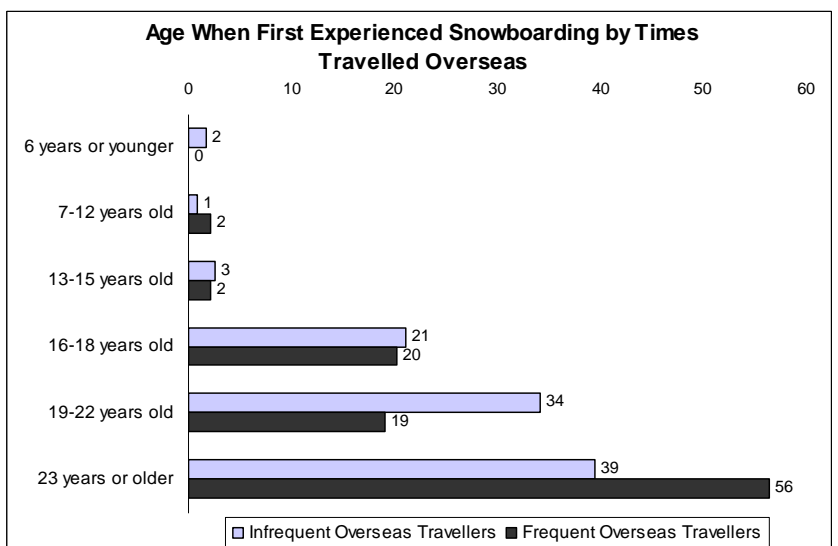
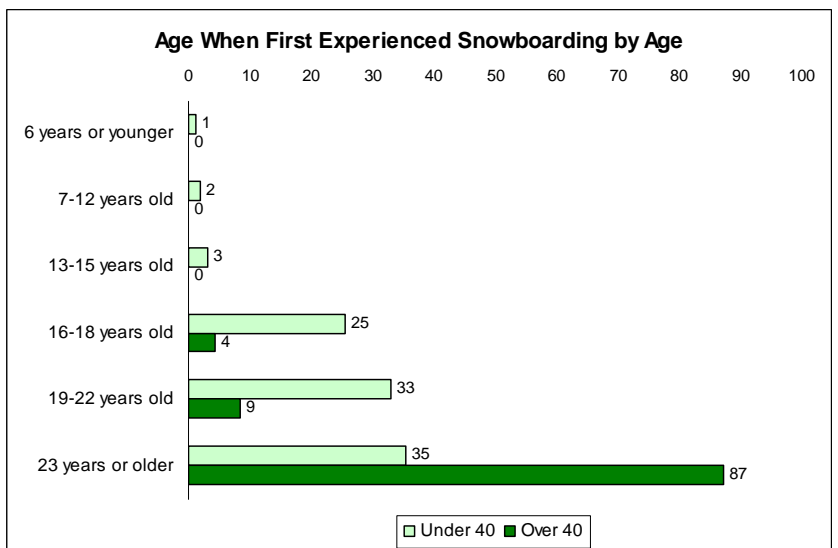
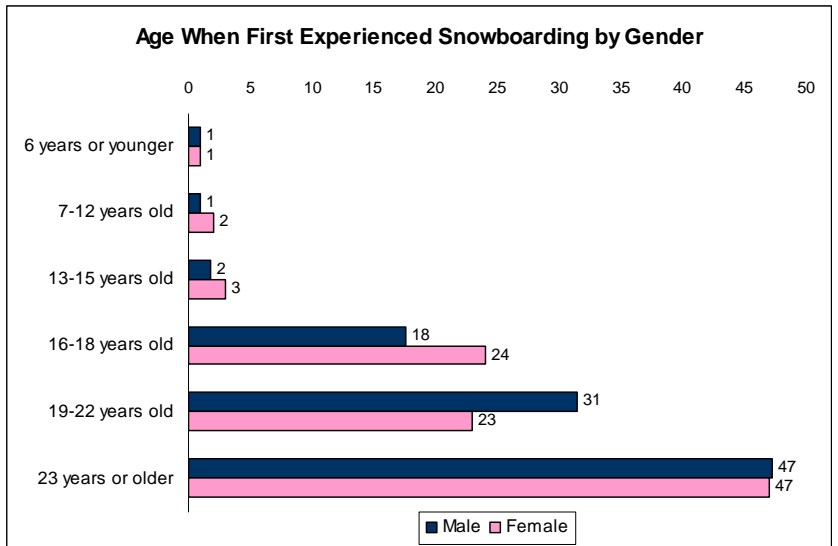
- Respondents were asked about their snowboarding skills. Responses differed substantially by gender, age and recency of skiing/snowboarding but not by prior visitation to Canada, skill level or frequency of overseas travel.
- A higher proportion of female respondents had just started snowboarding or had no experience in snowboarding whereas a higher proportion of male respondents had acquired intermediate levels of snowboarding skills.
- The majority of older respondents had no experience in snowboarding whereas younger respondents were more actively involved in the sport with over one-fifth at beginner level and another one-fifth at intermediate to instructor levels of skill.
- A higher proportion of those who had not skied or snowboarded recently had no prior experience in snowboarding.
- A majority of recent skiers/snowboarders indicated that they had no prior experience in snowboarding or had just started to take up the sport.



4.11 Skier/Snowboarder Behaviour (continued)

How old were you when you first experienced snowboarding?

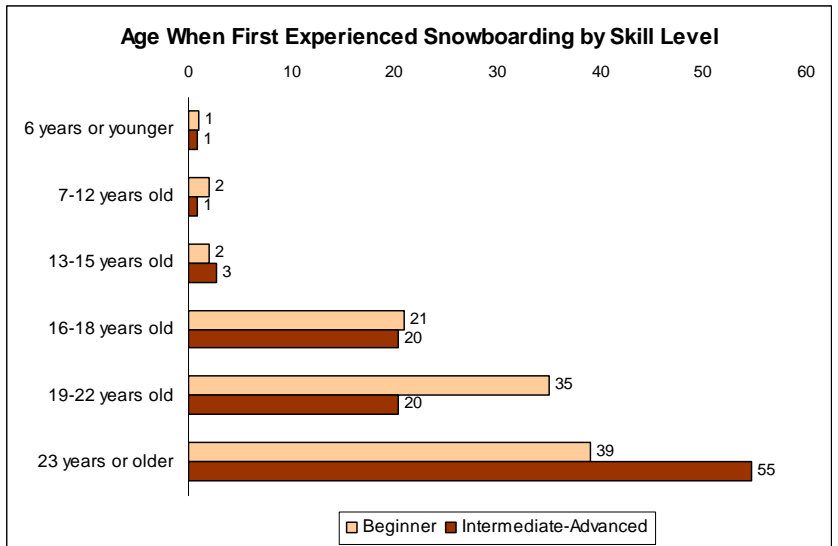
- Respondents were asked about the age at which they first experienced snowboarding. Responses differed substantially by gender, age, frequency of overseas travel and skill level but not by prior visitation to Canada or recency of skiing/snowboarding.
- Irrespective of gender, almost half of all male and female respondents started snowboarding when they were 23 years of age or older. Amongst those who started earlier, male respondents were more likely to have started between the ages of 19 and 22 whereas female respondents were more likely to have started between the ages of 16 and 18.
- The majority of older respondents first experienced snowboarding when they were 23 years of age or older. Although a substantial proportion of younger respondents also started snowboarding at this same age, compared to their older counterparts, they were more likely to start snowboarding between the ages of 16 and 22.
- A higher proportion of frequent overseas travellers started snowboarding when they were 23 years of age or older whereas a higher proportion of those who did not travel overseas as frequently started snowboarding between the ages of 19 and 22.



4.11 Skier/Snowboarder Behaviour (continued)

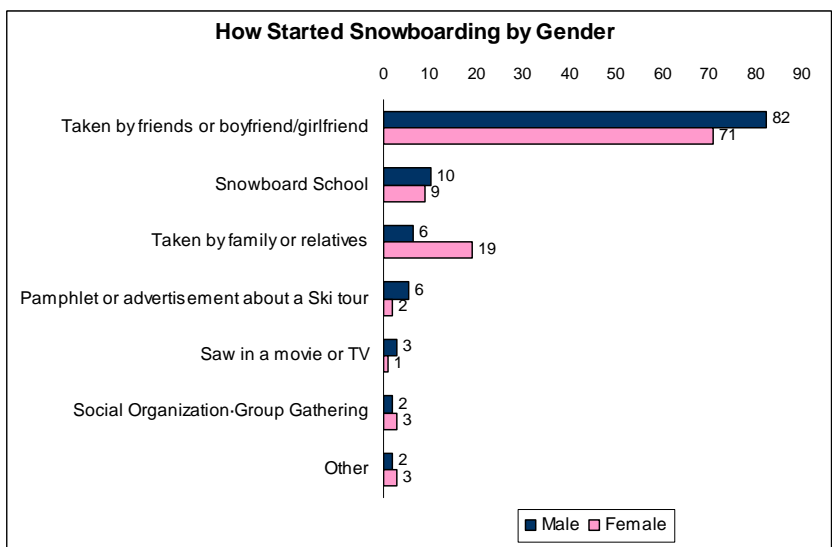
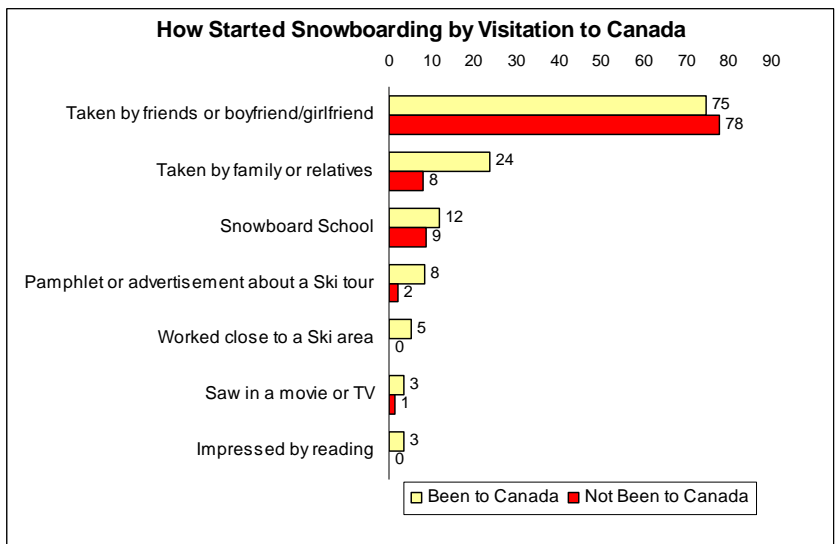
How old were you when you first experienced snowboarding? (continued)

- A higher proportion of respondents with intermediate-advanced skill levels started snowboarding when they were 23 years of age or older whereas a higher proportion of those with beginner skill levels started snowboarding between the ages of 19 and 22.



How did you start snowboarding?

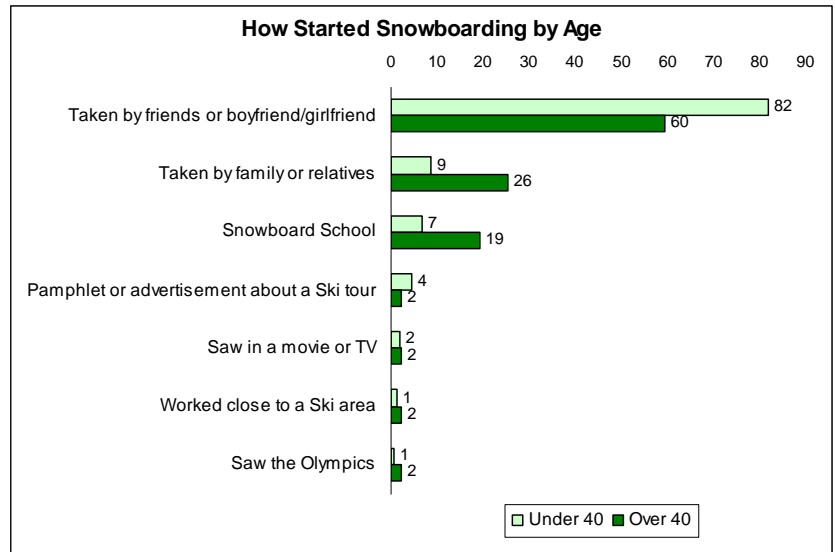
- Respondents were asked about how they were introduced to snowboarding. Responses differed substantially by prior visitation to Canada, gender, age and skill level but not by frequency of overseas travel or recency of skiing/snowboarding.
- Frequent responses included friends (including boyfriend/girlfriend), family/relatives, snowboard school, and pamphlet or advertisement about a ski tour.
- Respondents who had been to Canada were much more likely to have been introduced to snowboarding by family/relatives than were those who had never been to Canada.
- Male respondents were much more likely to have been introduced to snowboarding by friends, including their boyfriend/girlfriend whereas female respondents were more likely to have been introduced to snowboarding by their family/relatives.



4.11 Skier/Snowboarder Behaviour (continued)

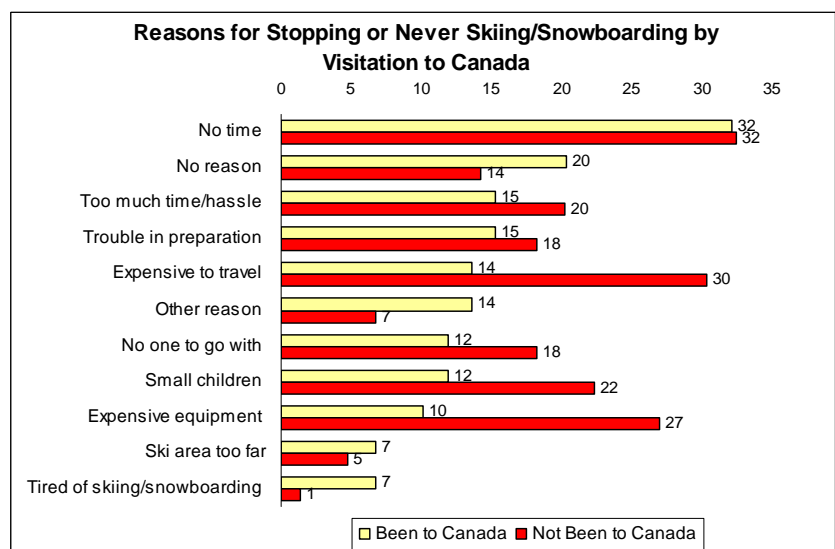
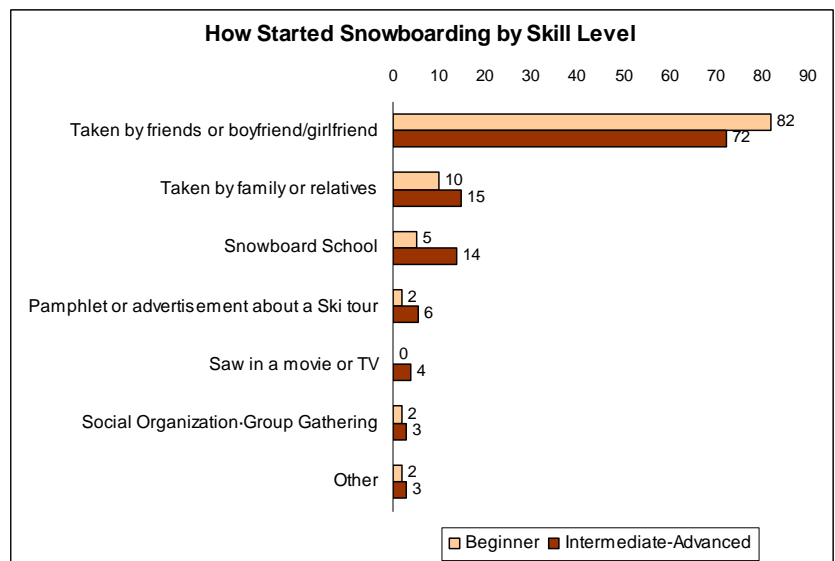
How did you start snowboarding? (continued)

- Younger respondents were much more likely to have been introduced to snowboarding by friends, including their boyfriend/ girlfriend whereas older respondents were more likely to have been introduced to snowboarding through family/relatives or a snowboard school.
- Respondents with beginner skill levels were much more likely to have been introduced to snowboarding through friends whereas those with intermediate-advanced skill levels were more likely to have been introduced to snowboarding by family/relatives or snowboard schools.



Reasons for those who have never skied or snowboarded (for those who have stopped):

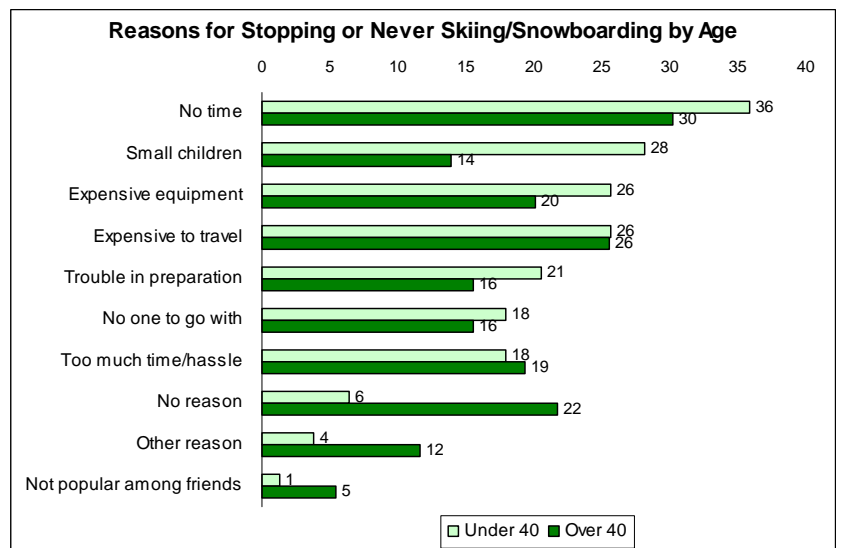
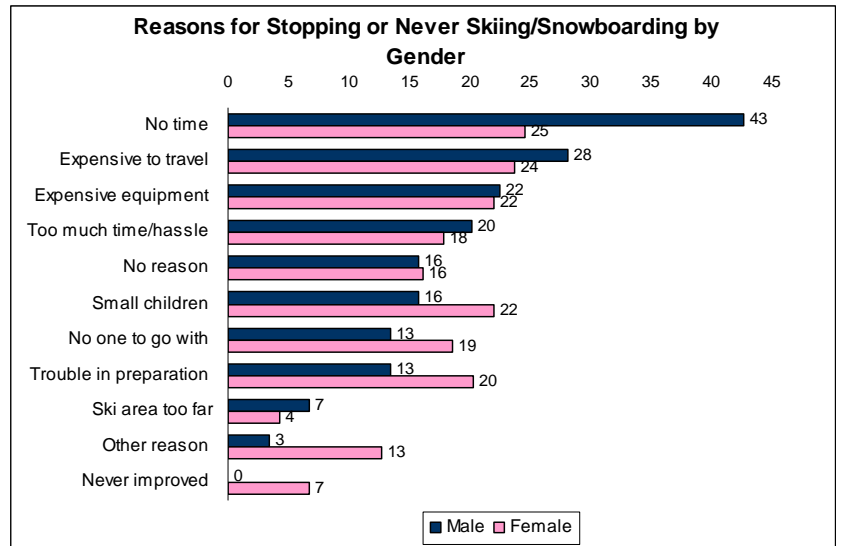
- Respondents were asked about their reasons for dropping, or not having tried, skiing/snowboarding. Responses differed substantially by prior visitation to Canada, gender and age.
- Lack of time seemed to be the top reason for all respondent segments used in this analysis, although to a lesser extent for female respondents.
- Compared to those who had visited Canada before, respondents who had not been to Canada were much more likely to be inhibited by cost of equipment, cost of travel or having small children.



4.11 Skier/Snowboarder Behaviour (continued)

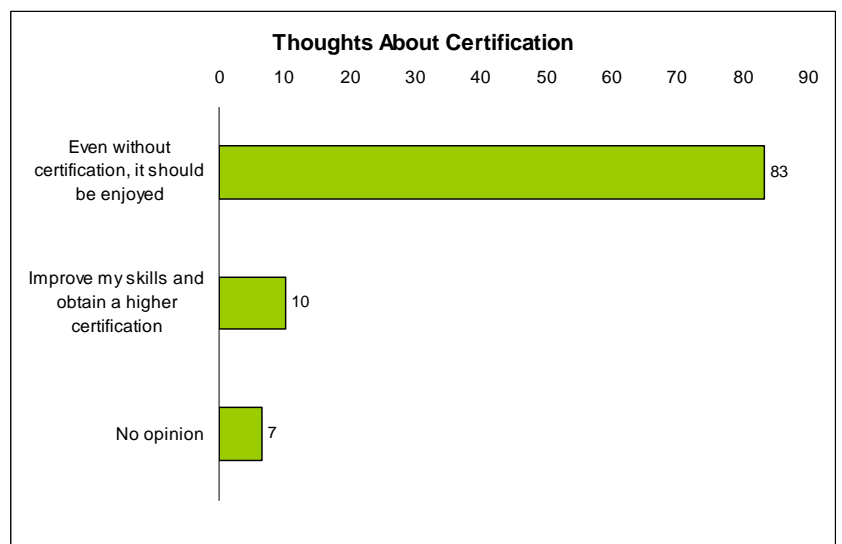
Reasons for those who have never skied or snowboarded (for those who have stopped):
(continued)

- Male respondents were more likely to have never skied/snowboarded or stopped due to lack of time whereas female respondents were more likely to indicate small children, trouble in preparation or having no-one to go with as their barriers.
- Compared to older respondents, younger respondents were more likely to have never skied/snowboarded or stopped due to lack of time, having small children or trouble in preparation for such trips.
- A significantly larger proportion of older respondents indicated that they had never skied/snowboarded or stopped due to no particular reason.



What do you think about certifications for skiing or snowboarding?

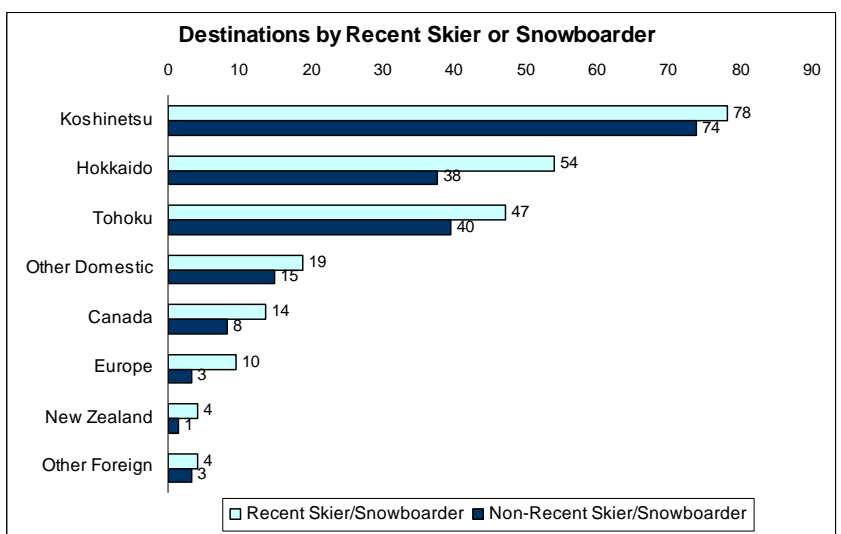
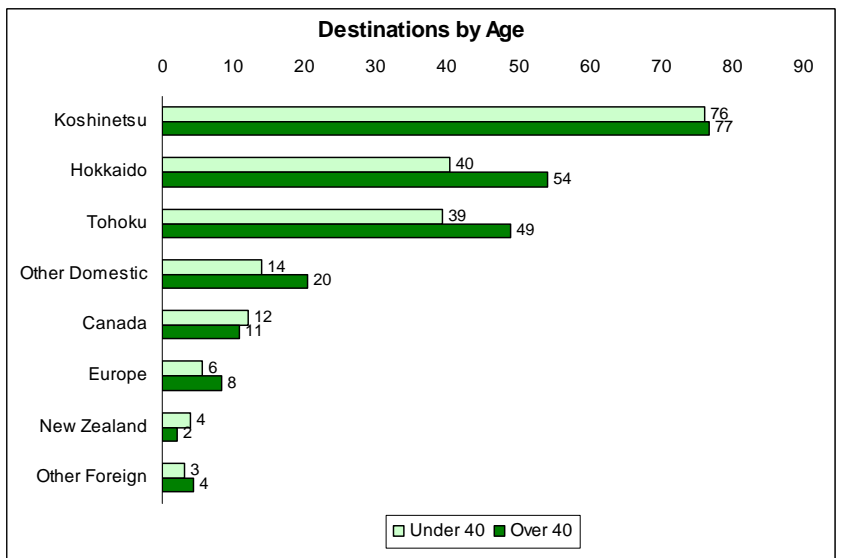
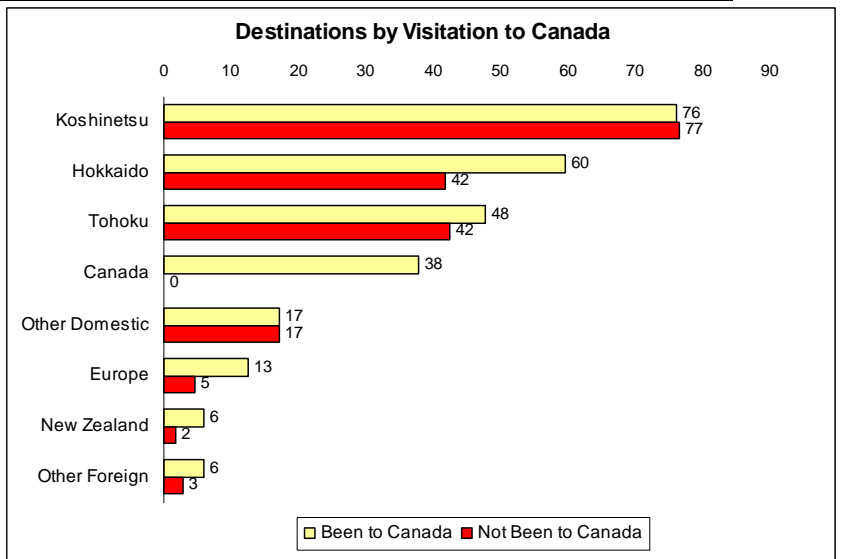
- Respondents were asked about their thoughts on certifications for skiing/snowboarding. There were no substantial differences in response between the various groups used for this analysis.
- In general, the majority of respondents felt the sport should be enjoyed with or without certification. A minority felt a higher certification would motivate them to improve their skills.



4.12 Ski Destination Experience and Awareness

Destinations that you have skied or snowboarded:

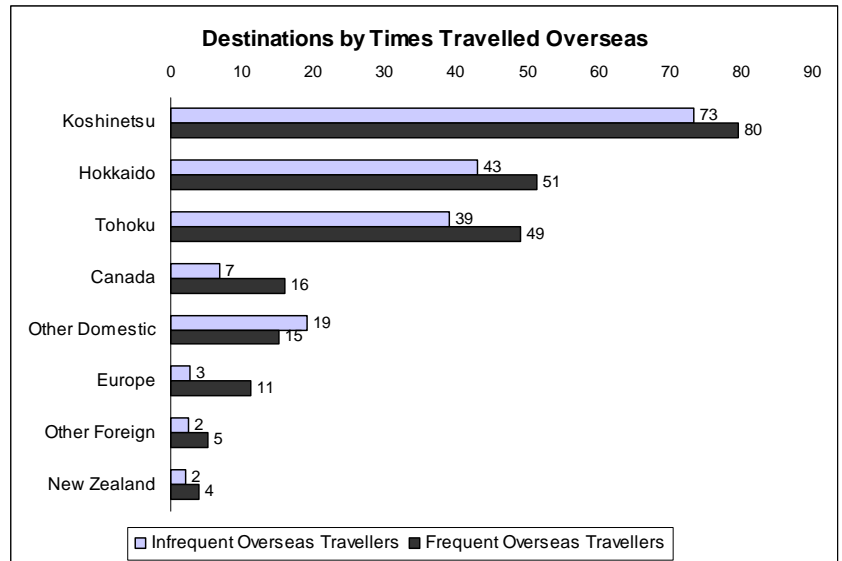
- Respondents were asked about various destinations in which they had skied or snowboarded. Responses differed substantially by prior visitation to Canada, age, recency of skiing/snowboarding frequency of overseas travel and skill level but not by gender.
- Domestic ski areas such as Koshinetsu, Hokkaido and Tohoku were indicated by most respondents. Among overseas ski destinations, Canada was the most visited.
- Compared to those who had not visited Canada before, respondents who had previously visited Canada were more likely to have skied or snowboarded at almost all of the listed destinations except for Koshinetsu.
- Compared to younger respondents, older respondents were more likely to have skied or snowboarded at Hokkaido and Tohoku as well as at other domestic destinations.
- Compared to those who had not skied/snowboarded recently, respondents who had participated in these activities recently were more likely to have skied or snowboarded at all of the listed destinations especially Hokkaido.



4.12 Ski Destination Experience and Awareness (continued)

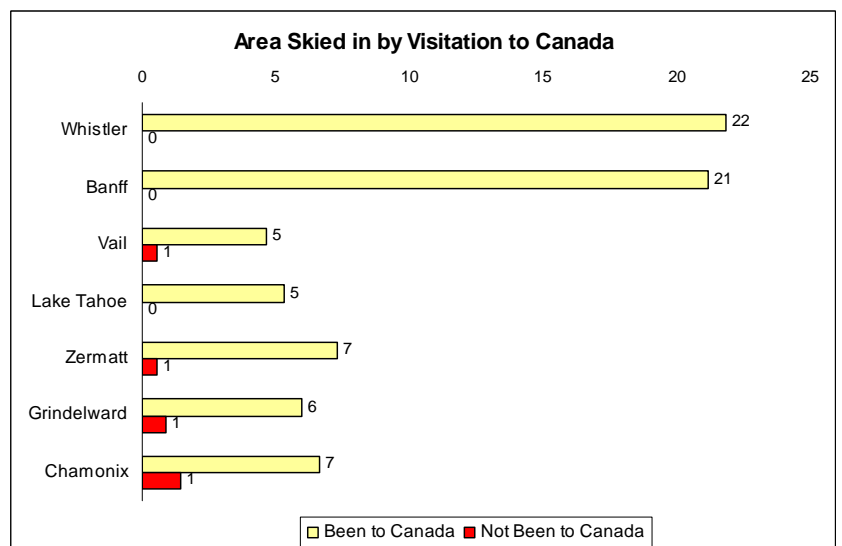
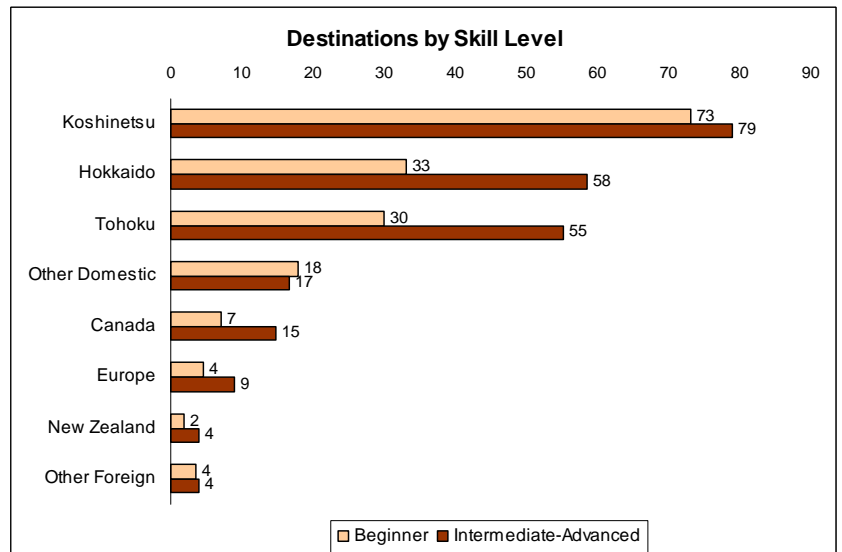
Destinations that you have skied or snowboarded: (continued)

- Compared to infrequent overseas travellers, respondents who travelled often were more likely to have skied or snowboarded at almost all of the listed destinations.
- Compared to respondents with beginner skill levels, those with intermediate-advanced skills were more likely to have skied or snowboarded at almost all of the listed destinations. This was particularly true for Tohoku and Hokkaido.



Have skied or snowboarded in the area:

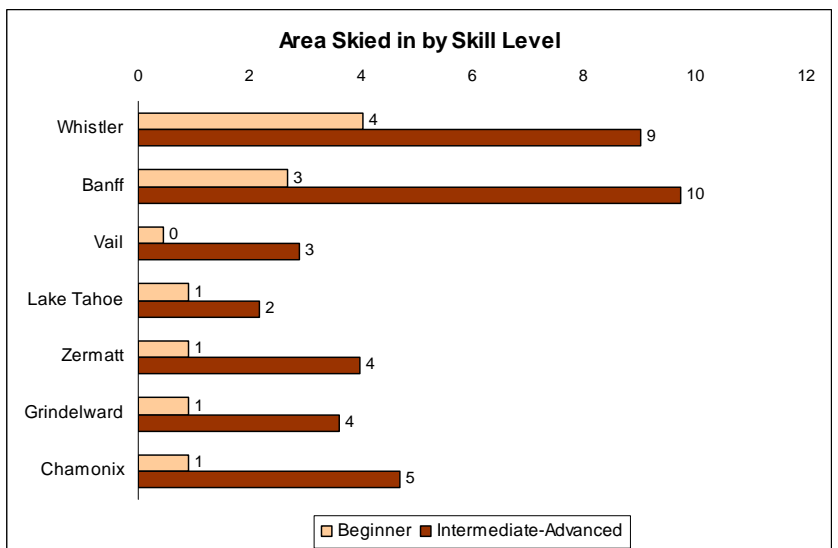
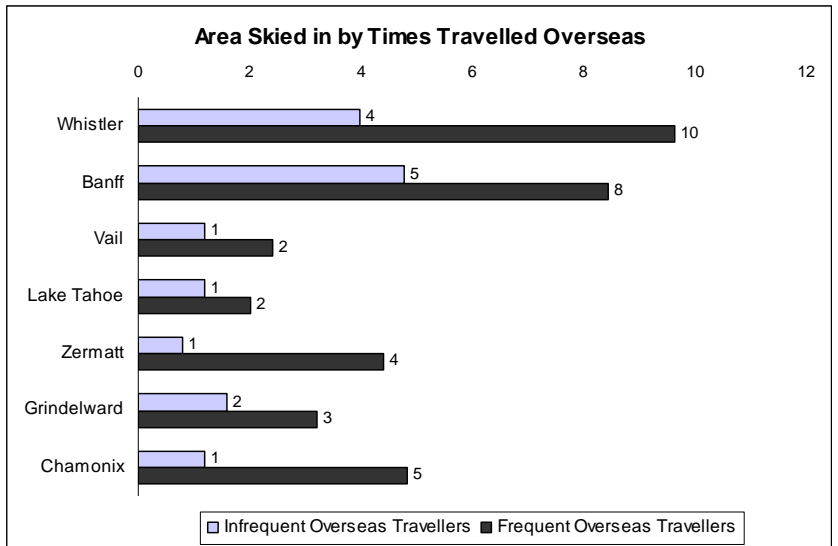
- Respondents were asked about ski destinations in which they had skied or snowboarded. Responses differed substantially by prior visitation to Canada, frequency of overseas travel and skill level but not by gender, age or recency of skiing/ snowboarding.
- One in five respondents who had previously been to Canada had skied at Whistler and/or Banff.
- Respondents who had previously been to Canada were more likely to have skied or snowboarded at all of the listed destinations.



4.12 Ski Destination Experience and Awareness (continued)

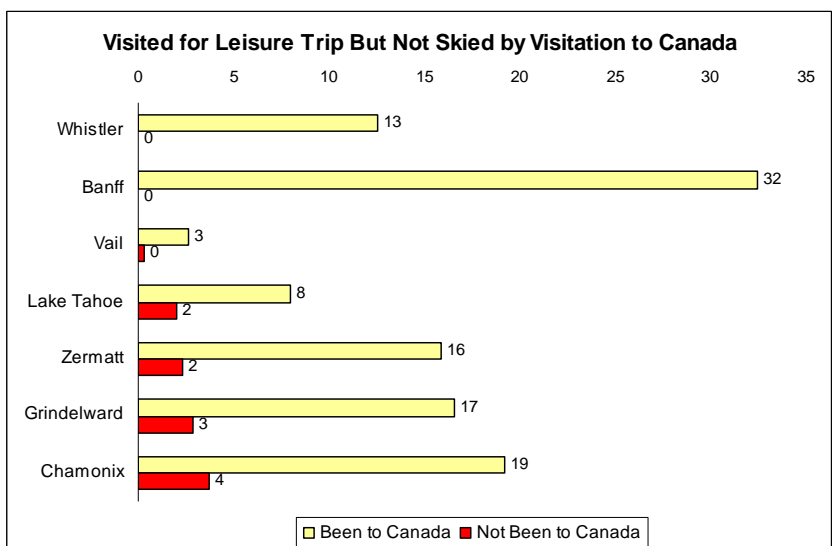
Have skied or snowboarded in the area: (continued)

- Not surprisingly, frequent overseas travellers were more likely to have skied or snowboarded at all of the destinations listed in the survey than were those who travelled less often.
- Respondents with intermediate-advanced skill levels were more likely to have skied or snowboarded at all of the listed destinations than were those who were less skilled.



Have visited for leisure trip but not skied or snowboarded:

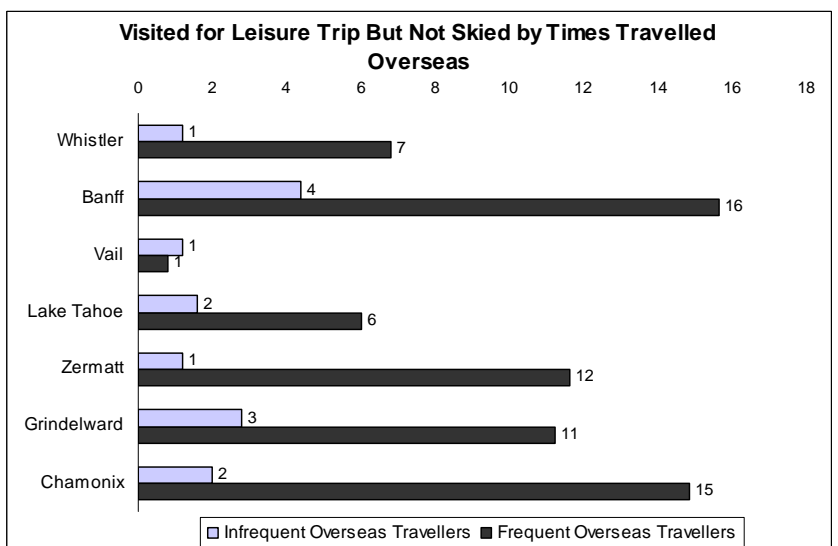
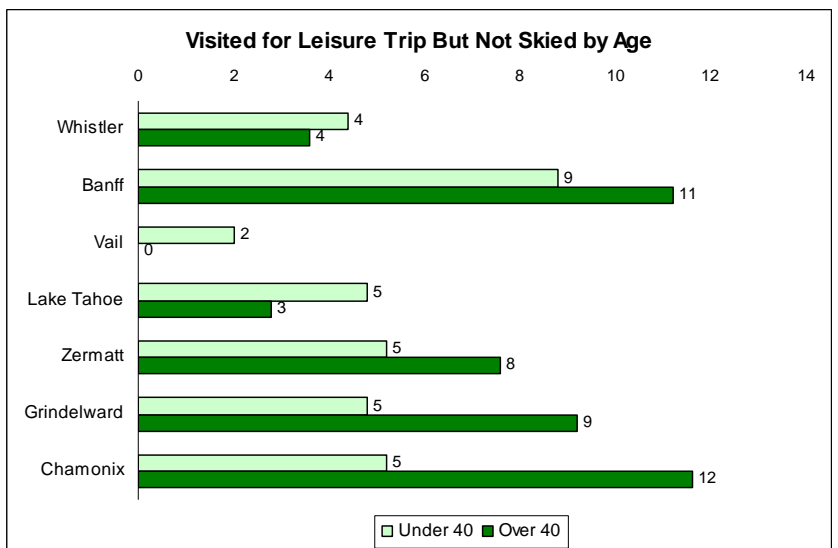
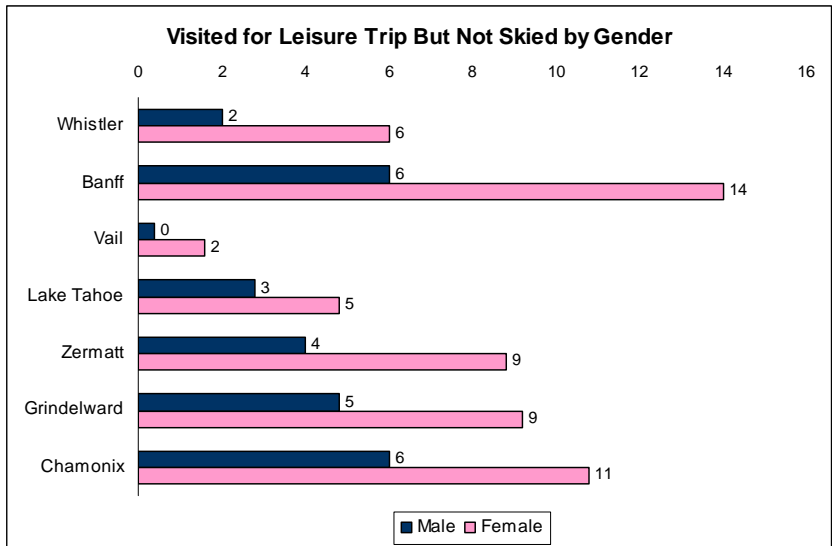
- Respondents were asked about ski destinations they had visited for leisure but not skied/snowboarded. Responses differed substantially by prior visitation to Canada, gender, age and frequency of overseas travel but not by recency of skiing/snowboarding or skill level.
- Banff, and to a lesser extent, Whistler, had been visited for a leisure trip by respondents who had previously been to Canada. These respondents were also more likely to have visited other overseas ski destinations on their leisure trips.



4.12 Ski Destination Experience and Awareness (continued)

Have visited for leisure trip but not skied or snowboarded:
(continued)

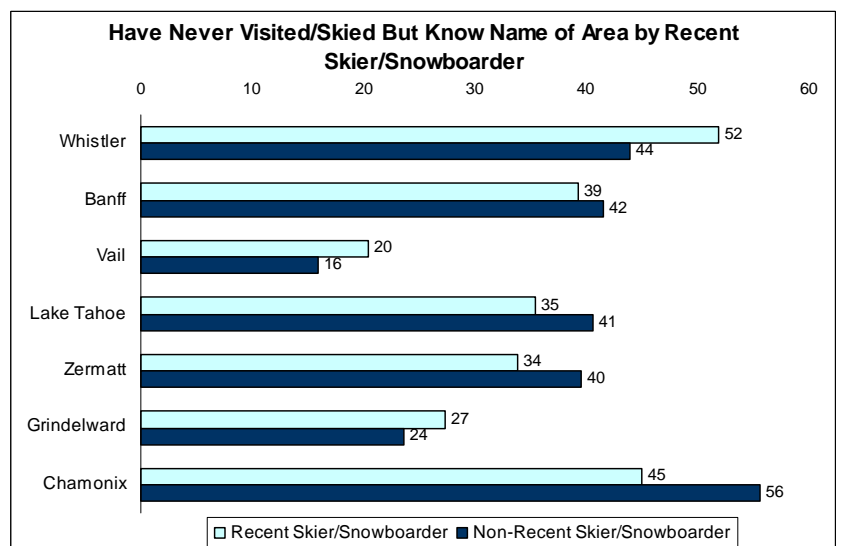
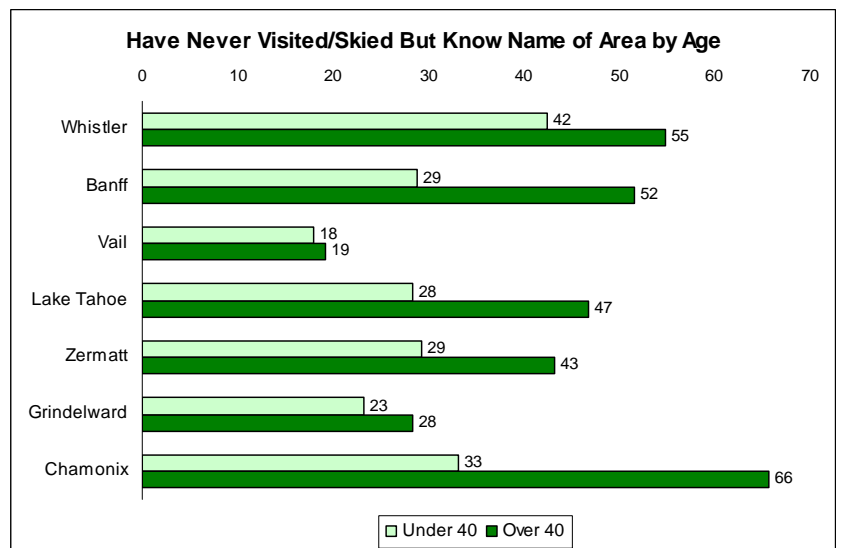
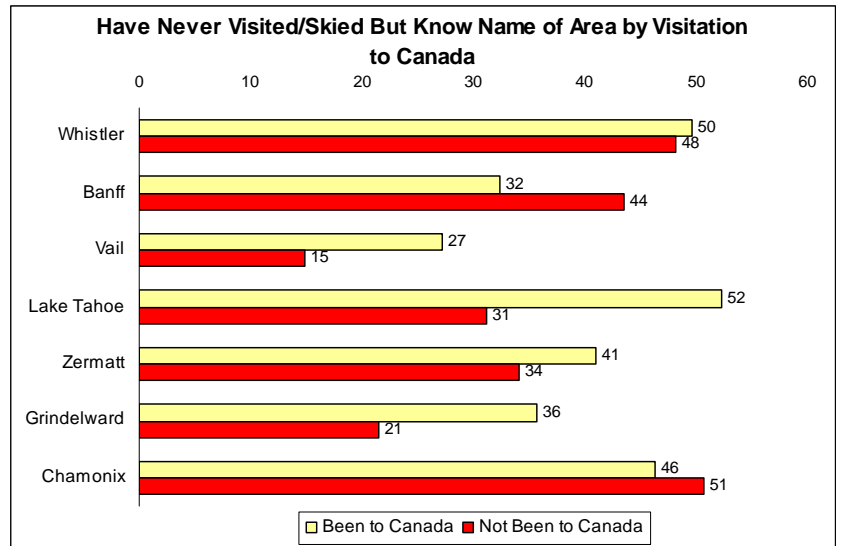
- Female respondents were more likely to have visited all of the listed destinations especially Banff, Chamonix and Zermatt for a leisure trip than were male respondents.
- Compared to those who were younger, older respondents were more likely to have visited the destinations in Europe for a leisure trip.
- Compared to infrequent overseas travellers, respondents who travelled often were much more likely to have visited almost all of the destinations listed in the survey on a leisure trip.



4.12 Ski Destination Experience and Awareness (continued)

Have never visited nor skied/snowboarded, but know the name:

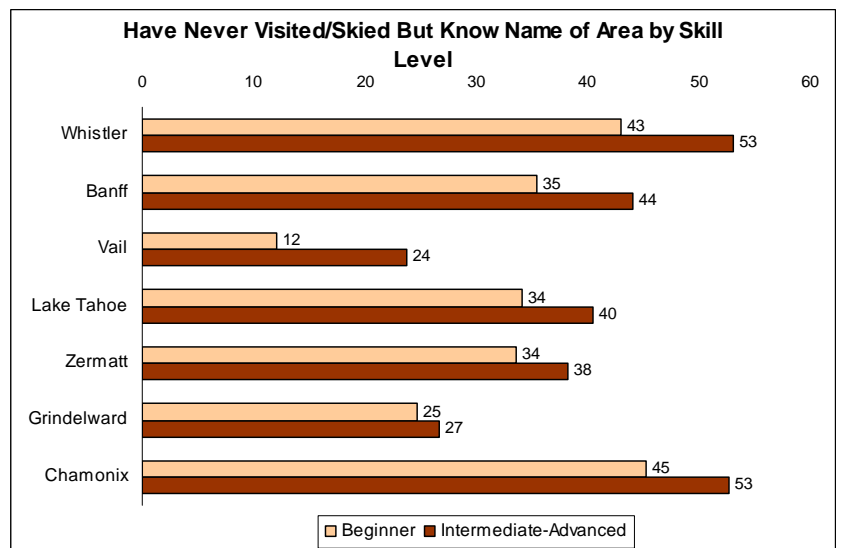
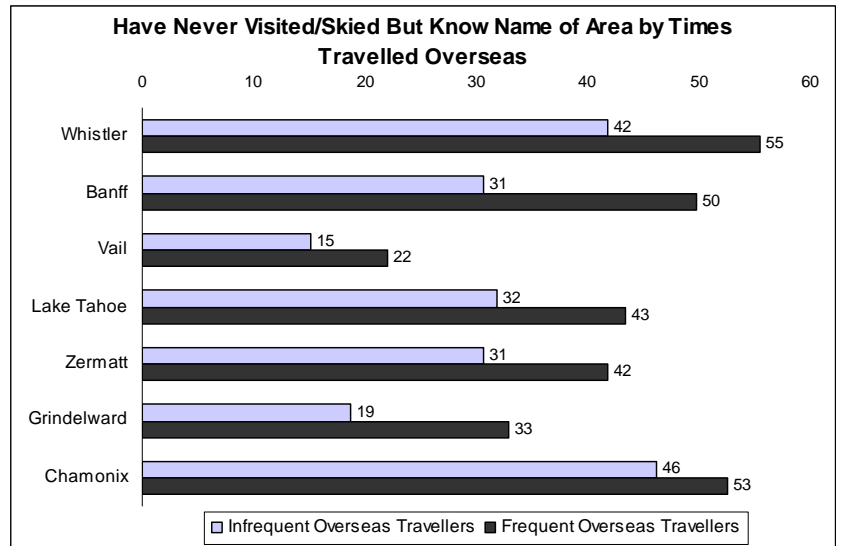
- Respondents were asked about ski destinations they knew of by name but had never visited or skied/snowboarded. Responses differed substantially by prior visitation to Canada, age, frequency of overseas travel, recency of skiing/snowboarding and skill level but not by gender.
- The awareness of Whistler is generally high in that around half of all respondents had heard of Whistler despite that they had never skied/snowboarded or visited the area.
- Respondents who had previously visited Canada were more likely to have heard of Lake Tahoe, Grendelward, Vail and Zermatt. Respondents who had not visited Canada in the past were more likely to have heard of Banff and Chamonix.
- Compared to younger respondents, older respondents were more likely to be aware of all of the listed destinations. This was particularly true for Chamonix, Banff, Lake Tahoe, Zermatt and Whistler.
- Recent skiers/snowboarders were more likely to be aware of Whistler whereas those who had not skied/snowboarded recently were more likely to be aware of Chamonix, Zermatt and Lake Tahoe.



4.12 Ski Destination Experience and Awareness (continued)

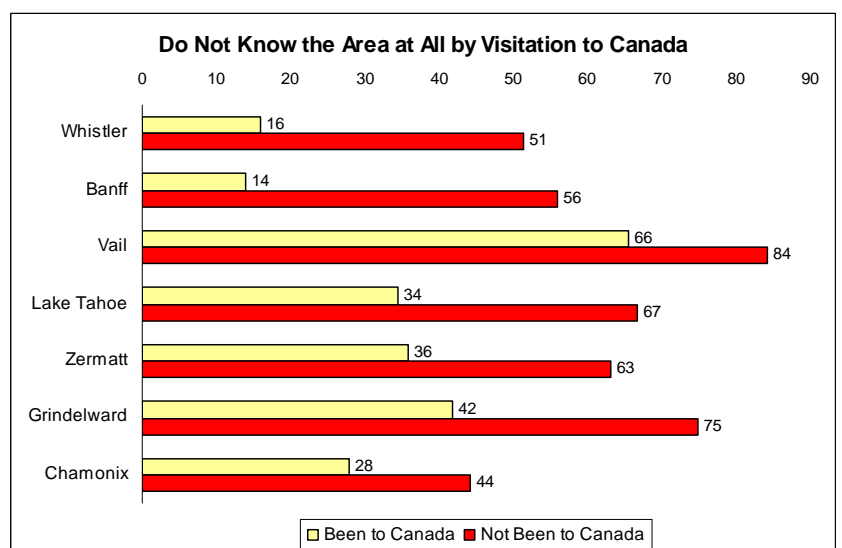
Have never visited nor skied/snowboarded, but know the name: (continued)

- Compared to infrequent overseas travellers, respondents who travelled often were more likely to be aware of all of the listed destinations. This was particularly true for Banff, Grindelwald, Whistler and Lake Tahoe.
- Compared to respondents with beginner skill levels, those with intermediate-advanced skills were more likely to be aware of all of the listed destinations especially Vail, Whistler and Banff.



Do not know the area at all:

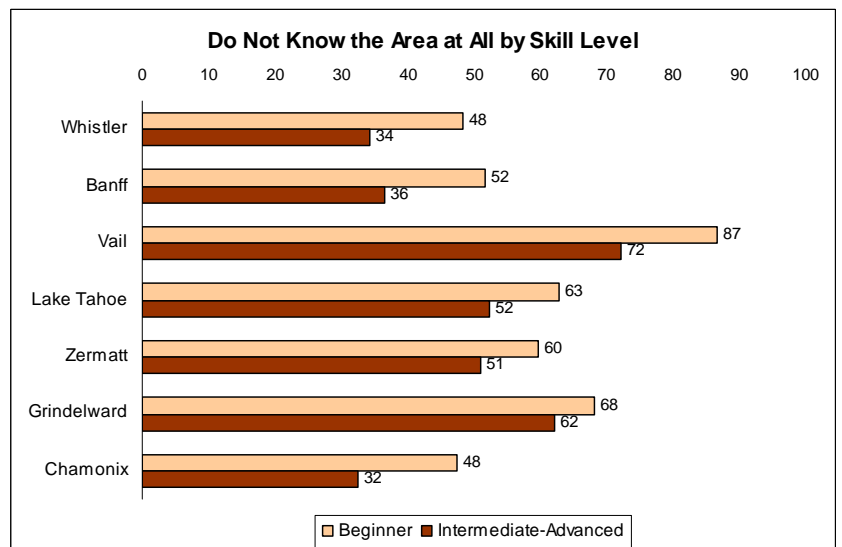
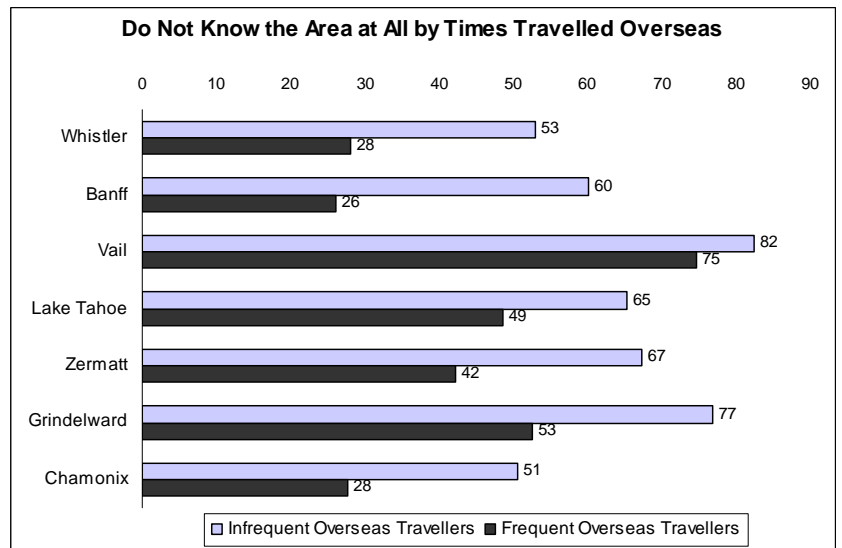
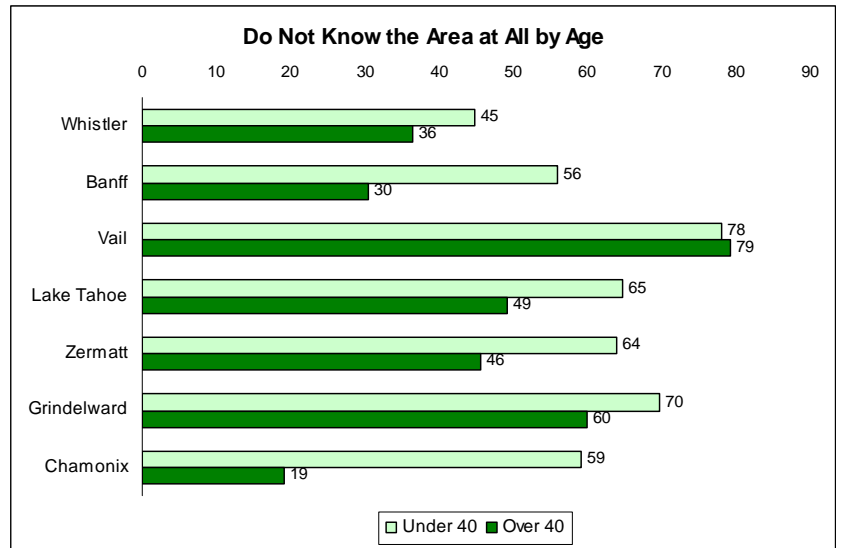
- Respondents were asked about ski destinations they did not know at all. Responses differed substantially by prior visitation to Canada, age, frequency of overseas travel and skill level but not by gender or recency of skiing/snowboarding.
- Awareness of all of the listed overseas destinations was generally low among those who had not previously visited Canada.



4.12 Ski Destination Experience and Awareness (continued)

Do not know the area at all:
(continued)

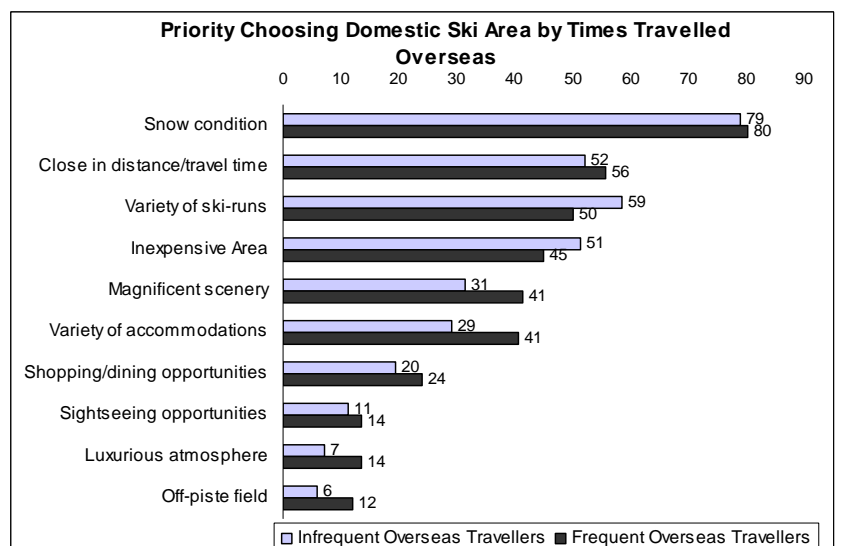
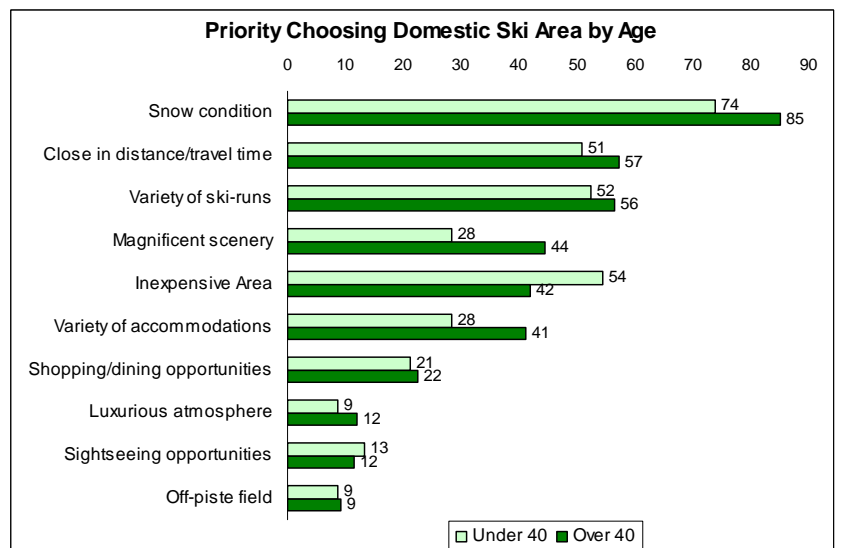
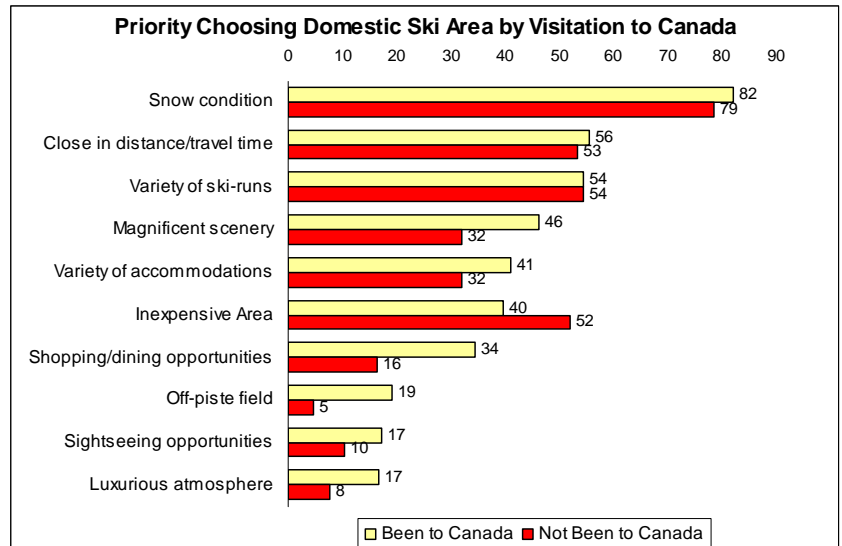
- Older respondents were much more likely to be aware of all the listed overseas destinations especially Chamonix and Banff.
- Compared to infrequent overseas travellers, respondents who travelled more often were more likely to be aware of all the listed destinations particularly Banff and the prominent ski destinations in Europe.
- Compared to respondents with beginner ski skills, those with intermediate-advanced skill levels were more likely to be aware of all of the listed overseas destinations in general.



4.13 Domestic Ski Destination/Accommodation Preferences

Priorities when choosing a domestic ski area:

- Respondents were asked about factors that influenced their selection of a domestic ski area. Responses differed substantially by prior visitation to Canada, age, frequency of overseas travel and skill level but not by gender or recency of skiing/snowboarding.
- In general, top considerations included snow conditions, variety of ski runs and distance/travel time.
- Respondents who had been to Canada placed a higher priority on shopping/dining opportunities, magnificent scenery, off-piste field, variety of accommodations, luxurious atmosphere and sightseeing opportunities whereas those that had not been to Canada placed a higher priority on inexpensive areas.
- Older respondents placed a higher priority on magnificent scenery, variety of accommodations, snow conditions and distance/travel times whereas younger respondents placed higher priority on inexpensive areas.
- Infrequent overseas travellers placed a higher priority on variety of ski runs and inexpensive areas whereas those who travelled overseas frequently were more concerned about variety of accommodations, magnificent scenery, luxurious atmosphere and off-piste field.



4.13 Domestic Ski Destination/Accommodation Preferences (ctd.)

Priorities when choosing a domestic ski area: (continued)

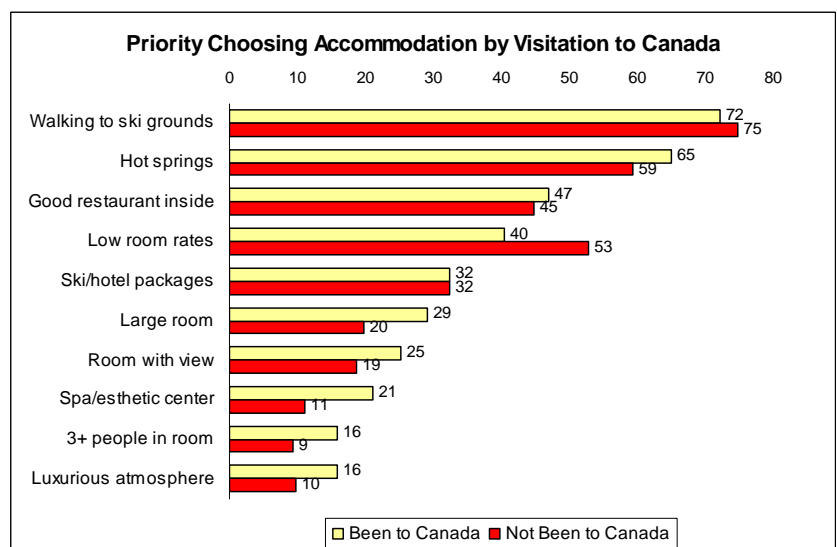
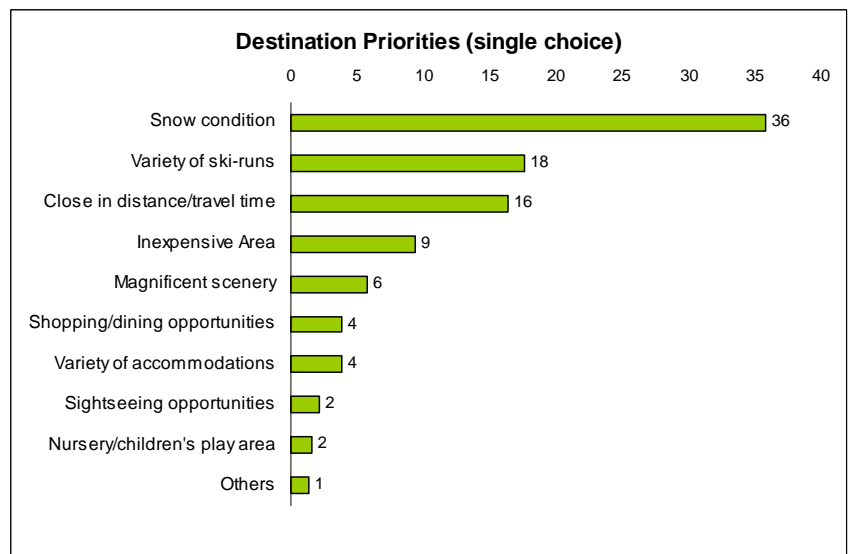
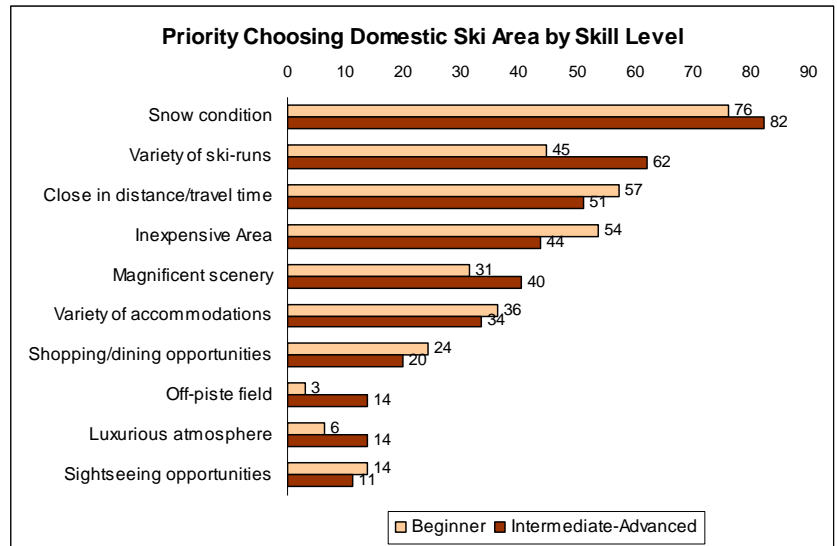
- Respondents with beginner level skills placed a higher priority on inexpensive areas and distance/ travel time whereas those with higher skill levels were more concerned with variety of ski runs, magnificent scenery and snow condition.

What is your highest priority when choosing a domestic ski area? (single choice)

- Regarding highest priority in choosing a domestic ski are, there were no substantial differences among the various groups used for this analysis.
- Overall, snow condition was of the highest priority to all respondents, followed by variety of ski runs and distance/travel time.

Priorities for choosing accommodations at a domestic ski area:

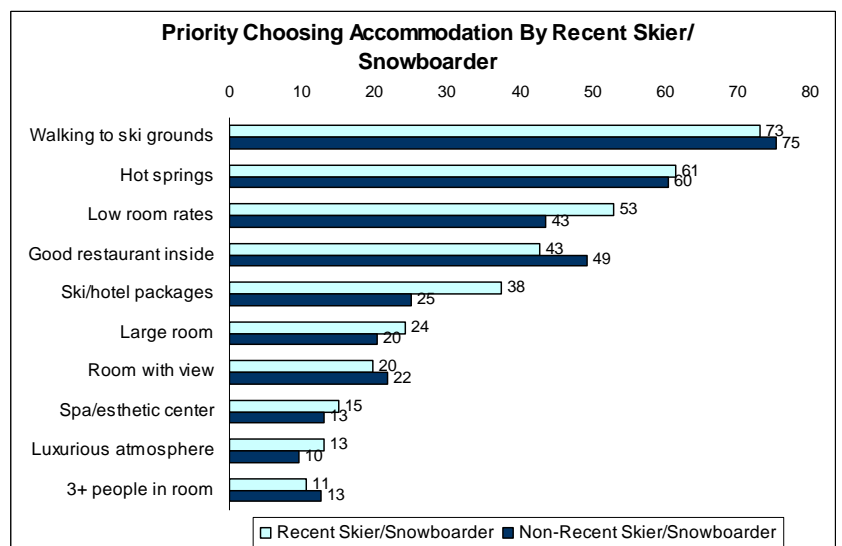
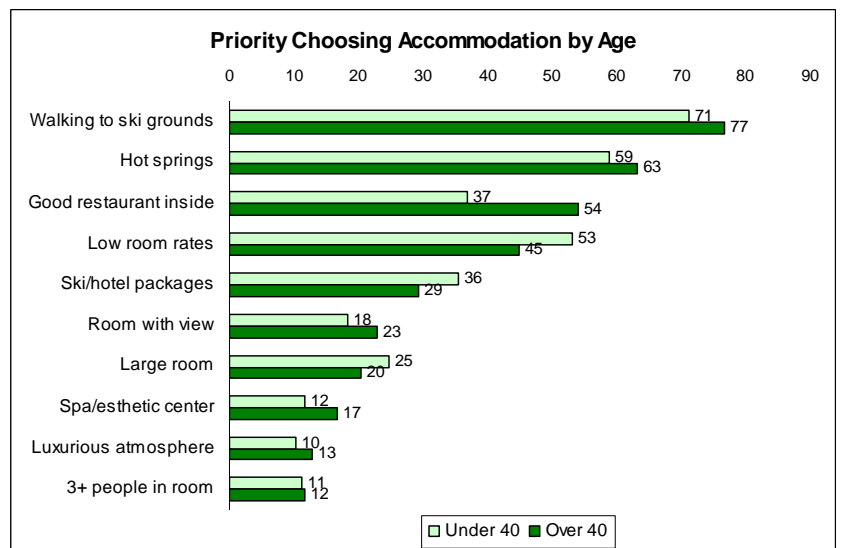
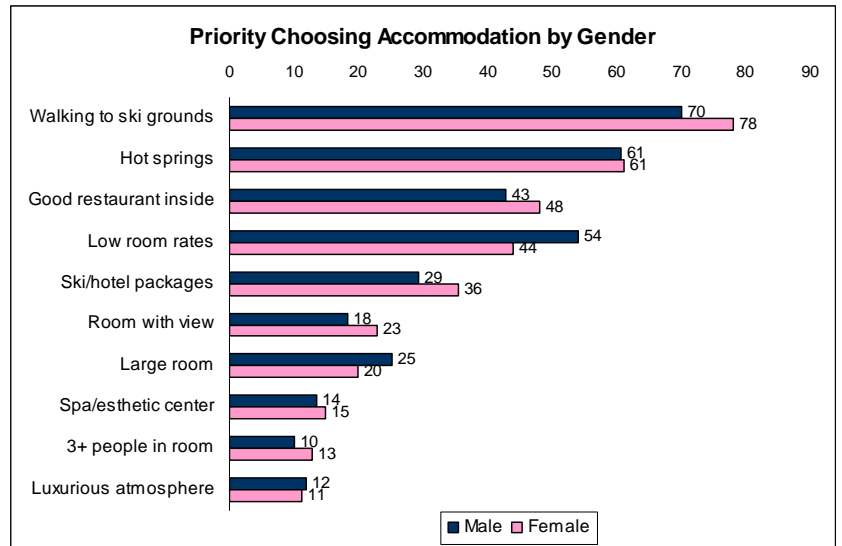
- Respondents were asked about the priorities in selecting accommodation at a domestic ski area. Responses differed substantially by prior visitation to Canada, gender, age, recency of skiing/ snowboarding and frequency of overseas travel but not by skill level.
- In general, top considerations included walking to ski grounds, hot springs, low room rates and good on-site restaurants.
- Previous visitors to Canada placed higher priorities on spa/esthetic centre and large rooms whereas low room rates were a higher priority for those who had not visited Canada.



4.13 Domestic Ski Destination/Accommodation Preferences (ctd.)

Priorities for choosing accommodations at a domestic ski area: (continued)

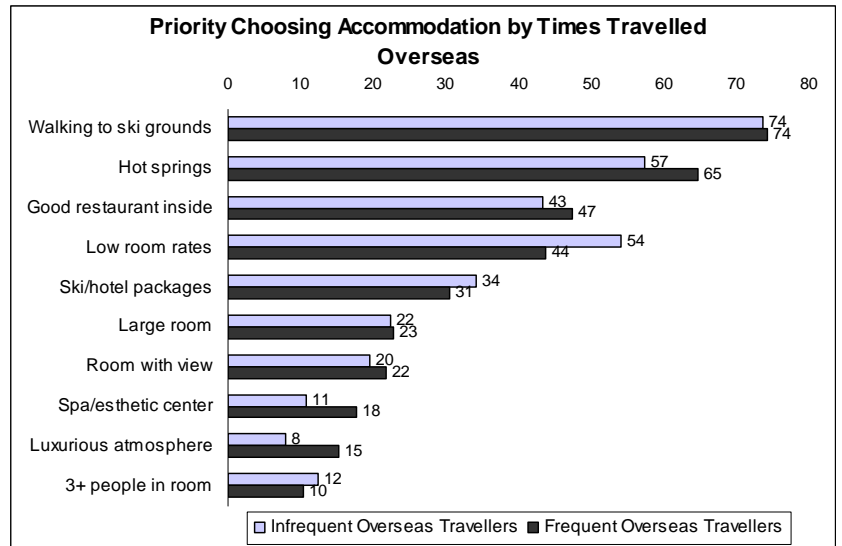
- Male respondents placed higher priorities on low room rates and larger rooms whereas female respondents placed higher priorities on proximity to ski grounds, the availability of ski/hotel packages and good on-site restaurants.
- Younger respondents placed higher priority on low room rates, ski/hotel packages and large rooms whereas older respondents placed higher priorities on amenity related features including good on-site restaurants, proximity to ski grounds, room with a view, spa/aesthetic centres and hot springs.
- Recent skiers/snowboarders placed higher priorities on ski/hotel packages and low room rates when it came to selecting accommodation at domestic ski areas whereas good on-site restaurants were more important to those who had not skied or snowboarded recently.



4.13 Domestic Ski Destination/Accommodation Preferences (ctd.)

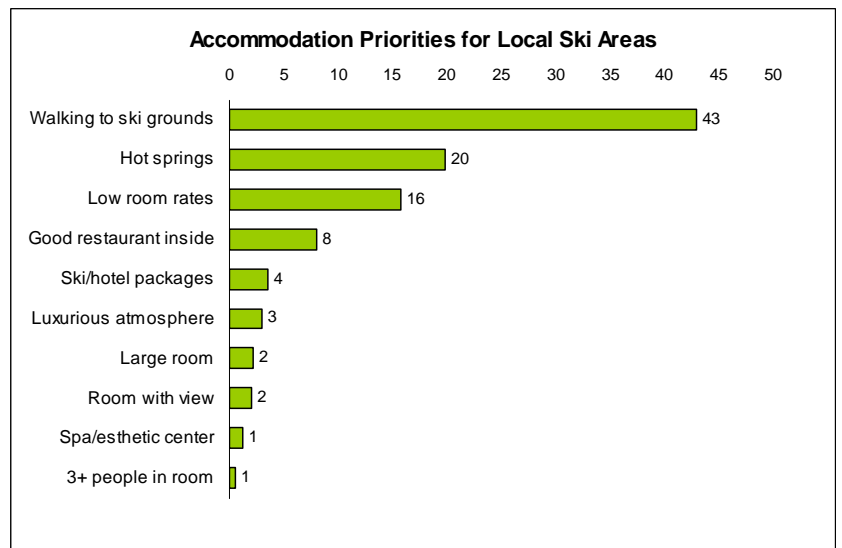
Priorities for choosing accommodations at a domestic ski area: (continued)

- Frequent overseas travellers placed higher priorities on hot springs, spa/aesthetic centres and luxurious atmosphere with respect to choosing accommodation at domestic ski areas whereas those who travelled less frequently placed higher priority on low room rates.



What is your highest priority when choosing accommodations at a domestic ski area? (single choice)

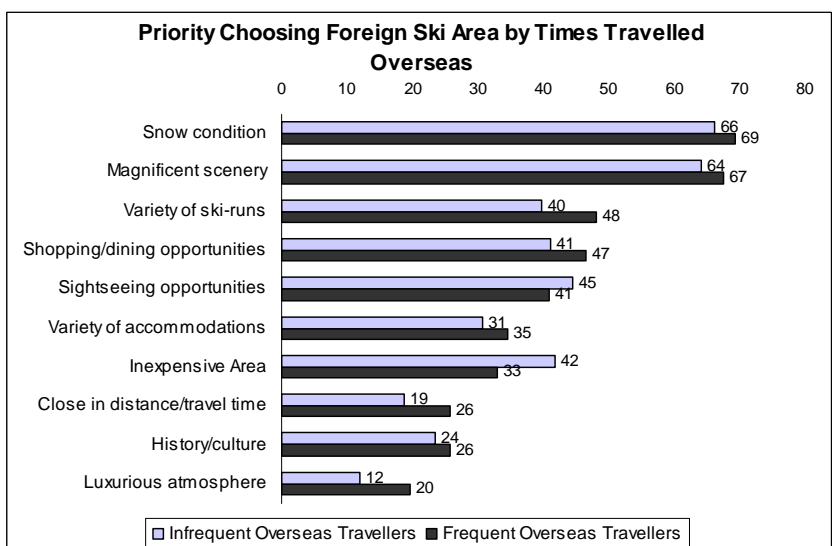
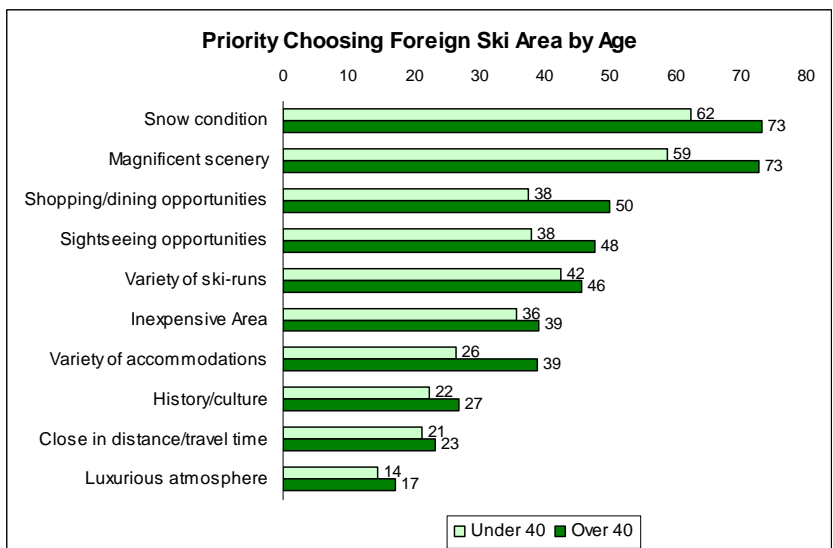
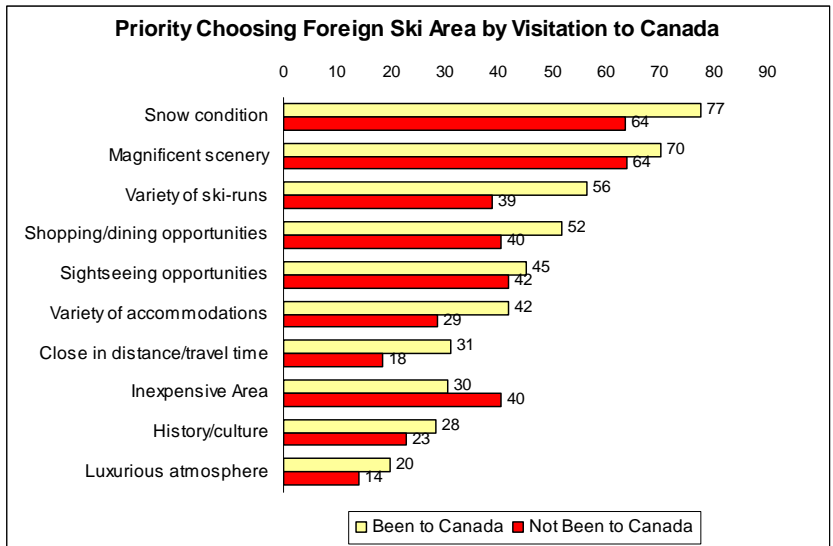
- Regarding highest priority in choosing accommodations at a domestic ski area, there were no substantial differences among the various groups used for this analysis.
- The ability to walk to ski grounds was by far the most frequently cited priority, followed by the presence of hot springs and the availability of low room rates.



4.14 Foreign Ski Destination/Accommodation Preferences

Priorities when choosing a foreign ski area:

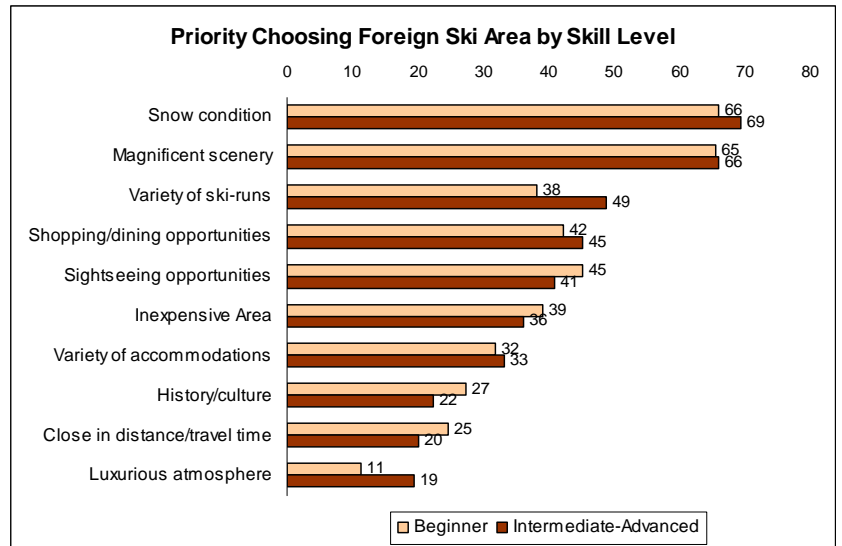
- Respondents were asked about their priorities in choosing a foreign ski area. Responses differed substantially by prior visitation to Canada, age, frequency of overseas travel and skill level but not by gender or recency of skiing/snowboarding.
- In general, top considerations included snow conditions, magnificent scenery, variety of ski runs, shopping/dining and sightseeing opportunities.
- Respondents who had been to Canada placed higher priority on almost every destination feature compared to those who had not visited Canada. This was particularly true with respect to variety of ski runs, distance/ travel time, snow conditions, variety of accommodation and shopping/dining opportunities. Of particular importance to those who had not been to Canada was the availability of inexpensive ski areas.
- Older respondents placed higher priority on every destination feature. This was especially true for magnificent scenery, accommodation variety, shopping/dining opportunities, snow conditions and sightseeing opportunities.
- Frequent overseas travellers placed higher priority on variety of ski runs, luxurious atmosphere, distance/travel time and shopping/dining opportunities when choosing a foreign ski area whereas those who travelled less frequently placed higher priority on inexpensive areas and sightseeing opportunities.



4.14 Foreign Ski Destination/Accommodation Preferences (ctd.)

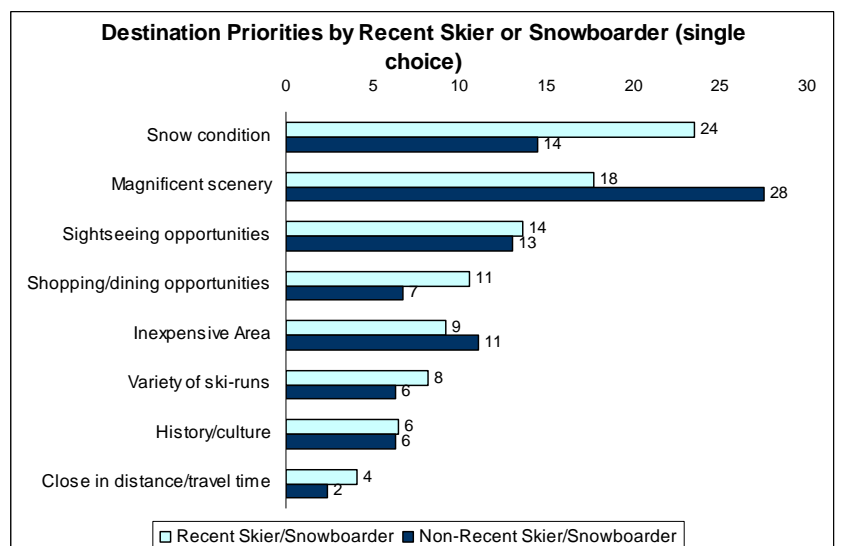
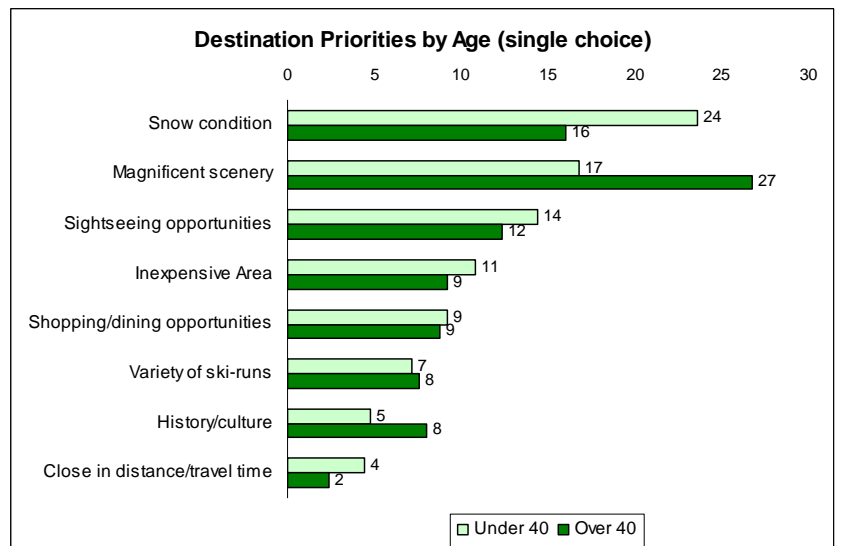
Priority when choosing a foreign ski area: (continued)

- Respondents with beginner skill levels placed higher priority on history/culture, distance/travel time and sightseeing opportunities when choosing a foreign ski area whereas those with intermediate-advanced skill levels placed higher priority on variety of ski runs and luxurious atmosphere.



What is your highest priority when choosing a foreign ski area? (single choice)

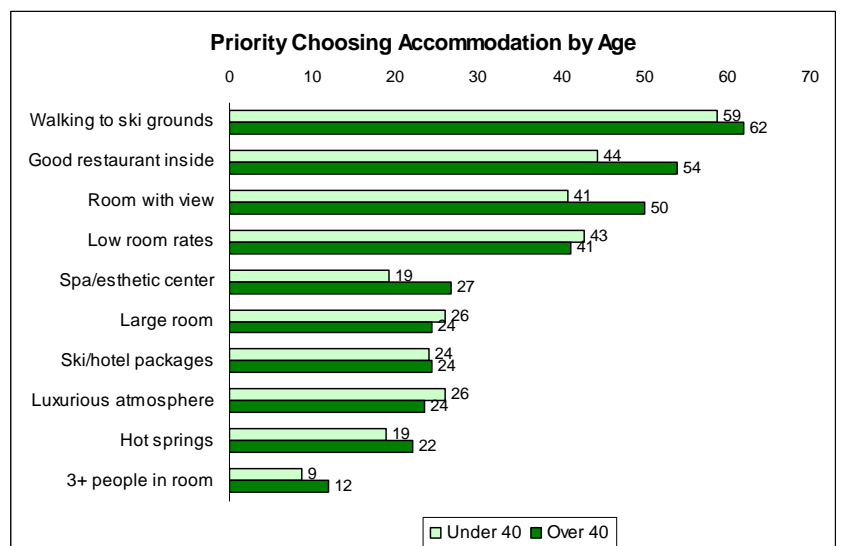
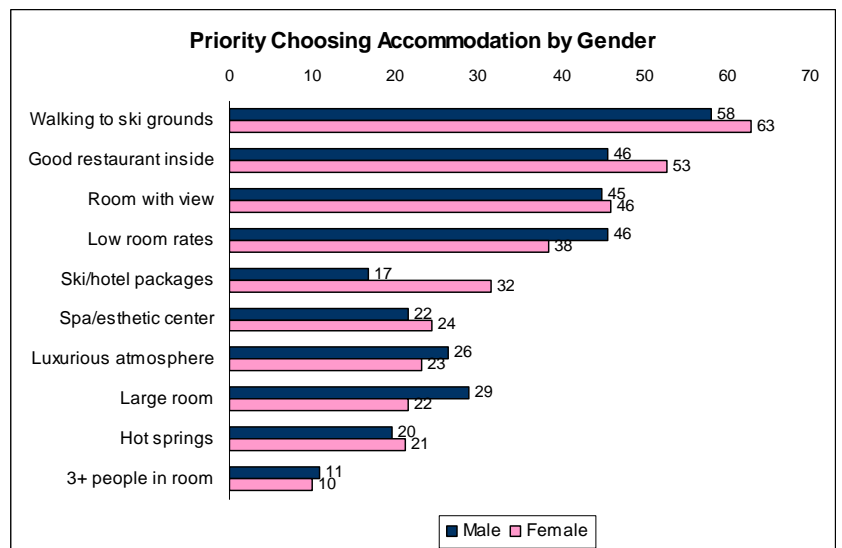
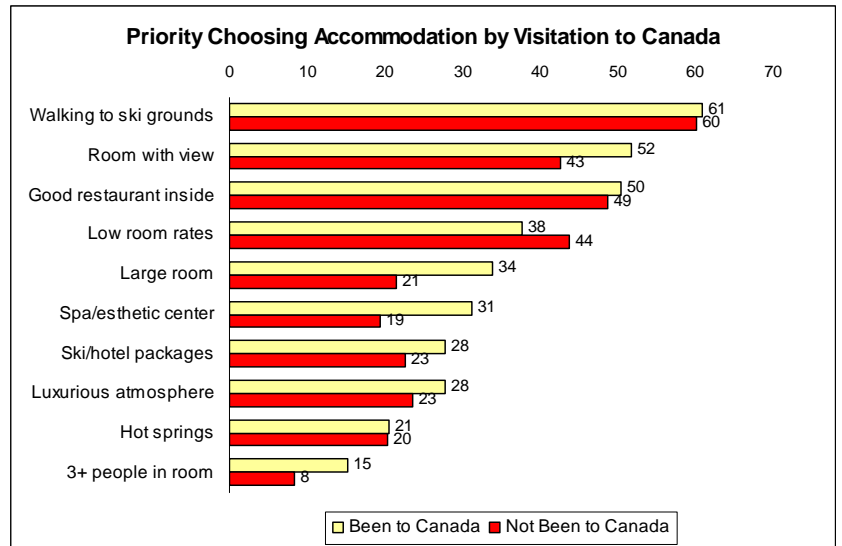
- Respondents were asked about their highest priority in choosing a foreign ski area. Responses differed substantially by age and recency of skiing/snowboarding but not by prior visitation to Canada, gender, frequency of overseas travel or skill level.
- In general, most frequent responses included magnificent scenery, snow conditions and sightseeing opportunities.
- Younger respondents placed higher priority on snow conditions when choosing a foreign ski area whereas older respondents placed higher priority on magnificent scenery.
- Recent skiers/snowboarders placed higher priority on snow conditions when choosing a foreign ski area whereas those who had not skied or snowboarded recently placed higher priority on magnificent scenery.



4.14 Foreign Ski Destination/Accommodation Preferences (ctd.)

Priorities for choosing accommodations at a foreign ski area:

- Respondents were asked about their priorities in choosing accommodations at a foreign ski area. Responses differed substantially by prior visitation to Canada, gender, age and recency of skiing/snowboarding but not by frequency of overseas travel or skill level.
- In general, top considerations included proximity to ski grounds, good on-site restaurants and room with view.
- Large rooms, spa/esthetic centre, the ability of accommodating more than 3 people in a room, ski/hotel packages and luxurious atmosphere were cited more often by respondents who had been to Canada in the past whereas low room rates were rated more highly by those who had not been to Canada before.
- Female respondents placed higher priority on ski/hotel packages, good on-site restaurants and the ability to walk to the ski grounds whereas male respondents placed higher priority on large rooms and low room rates.
- Older respondents placed higher priority on good on-site restaurants, room with a view and spa/esthetic centre than did younger respondents.



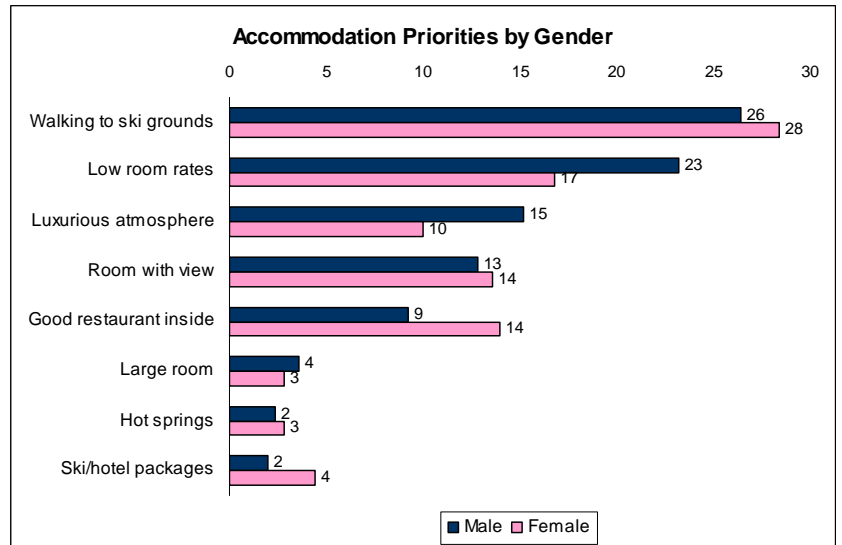
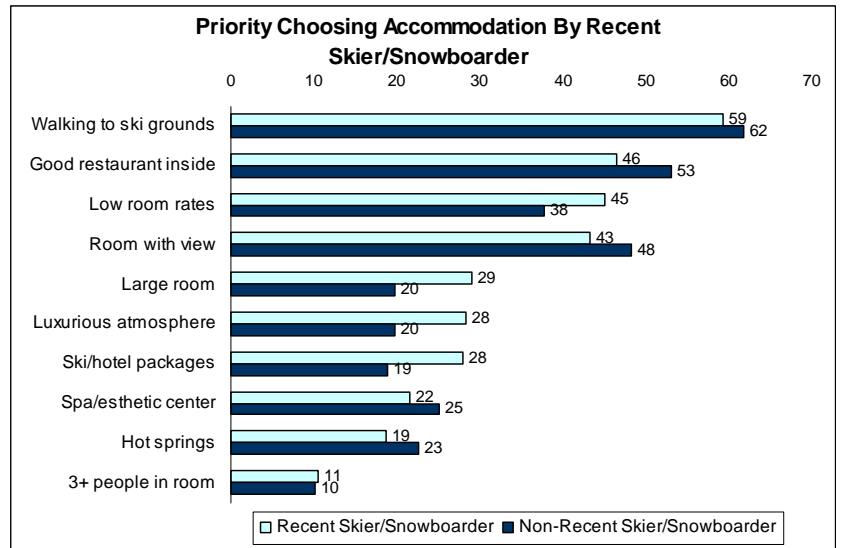
4.14 Foreign Ski Destination/Accommodation Preferences (ctd.)

Priorities for choosing accommodations at a foreign ski area: (continued)

- Recent skiers/snowboarders placed higher priority on large rooms, ski/hotel packages, luxurious atmosphere and low room rates whereas good on-site restaurants and a room with a view were of higher priority to those who had not skied or snowboarded recently.

What is your highest priority when choosing accommodations at a foreign ski area? (single choice)

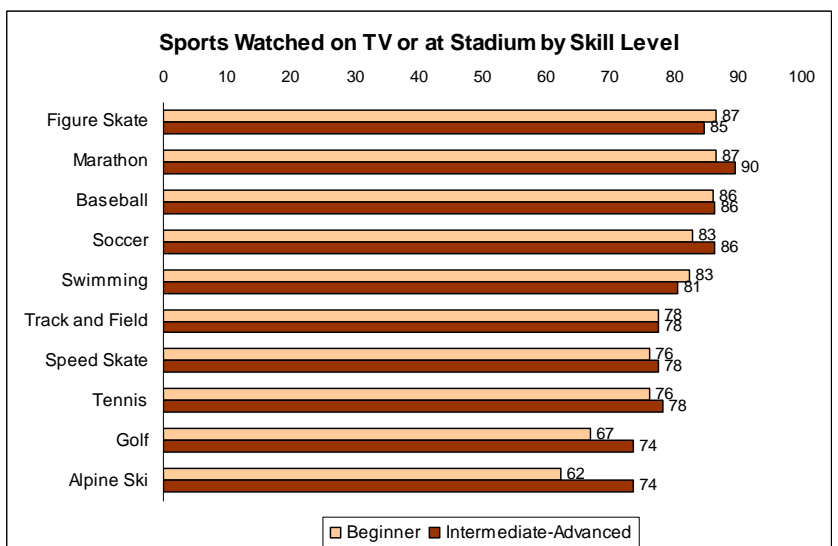
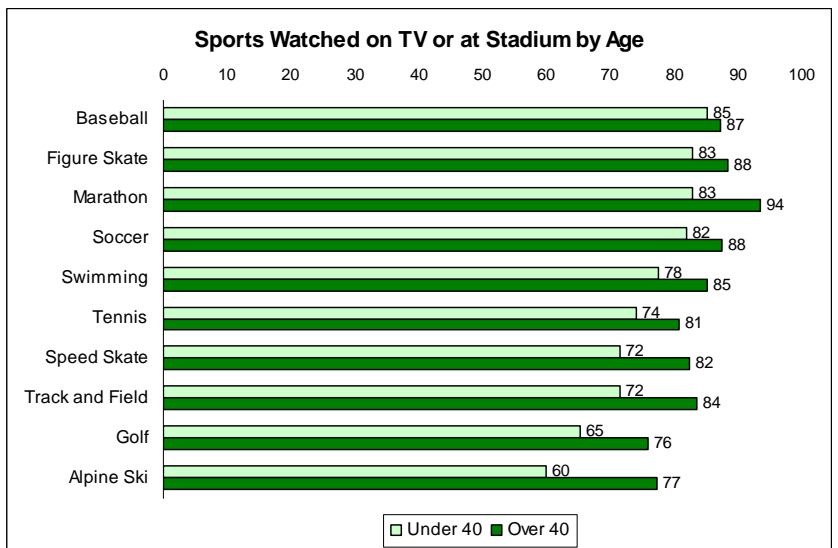
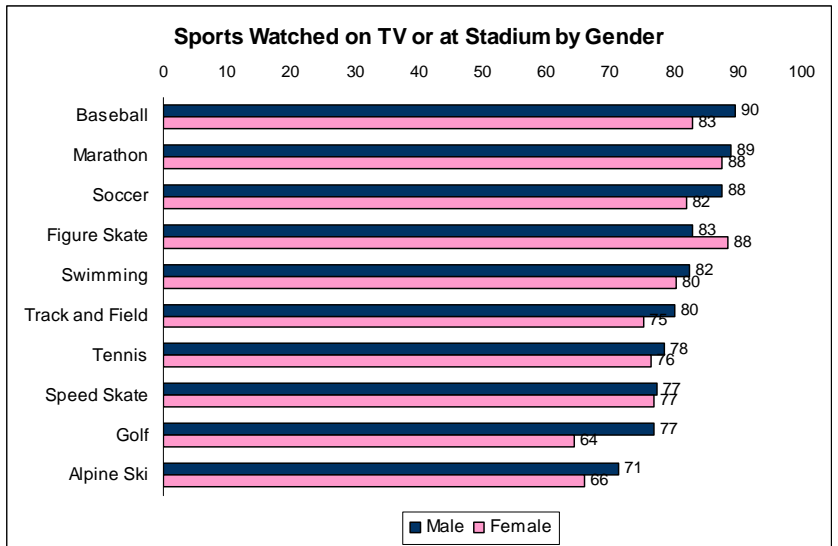
- Respondents were asked about their highest priority in choosing accommodations at a foreign ski area. Responses differed substantially only by gender.
- Overall, walking to ski grounds, low room rates, room with a view and luxurious atmosphere were the top priorities for all respondents.
- Low room rates and luxurious atmosphere were cited more frequently by male respondents whereas a larger proportion of female respondents placed priority on good on-site restaurants.



4.15 General Preferences of Sports Activities

Sports you have watched either on TV or at a stadium:

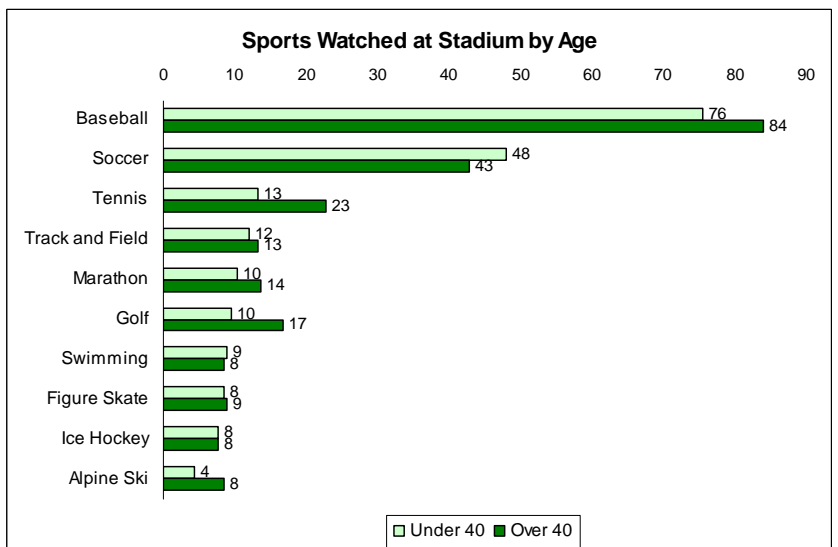
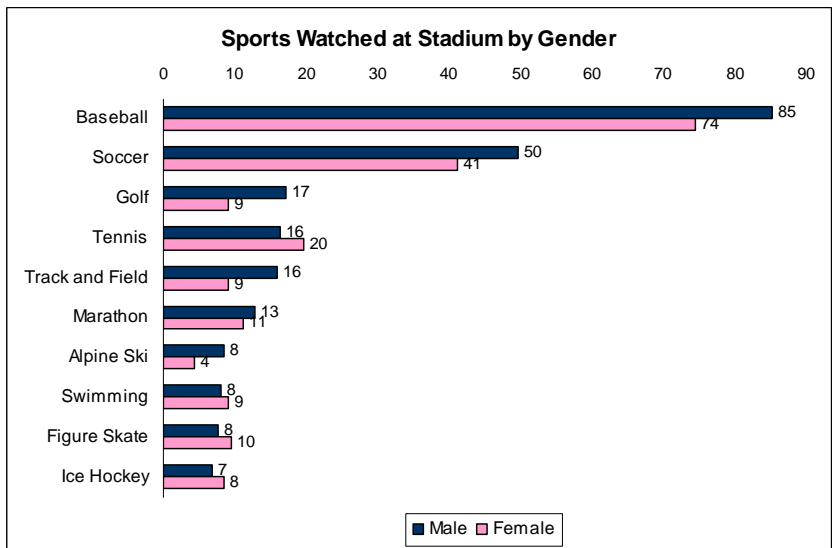
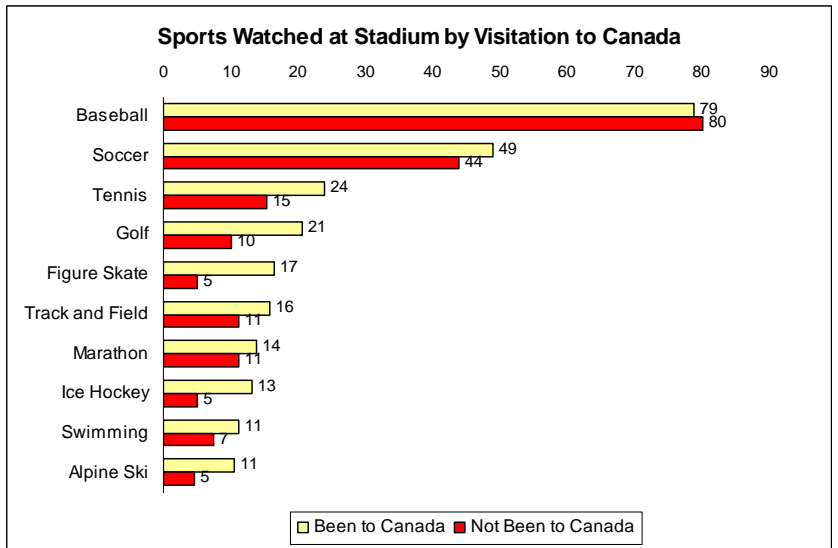
- Respondents were asked about sports they had watched live at a stadium or on TV. Responses differed substantially by gender, age and skill level but not by prior visitation to Canada, recency of skiing/snowboarding or frequency of overseas travel.
- Overall, viewership of all listed sports was generally high particularly marathon, baseball, figure skating and soccer.
- Male respondents were more likely to have watched golf, baseball, soccer, alpine skiing and track and field whereas female respondents were more likely to have watched figure skating.
- Older respondents were more likely to have watched all the listed sports than did younger respondents. These differences were most pronounced for alpine skiing, track and field, golf, marathon and speed skating.
- Respondents with intermediate-advanced skill levels were more likely to have watched alpine skiing and golf than were respondents with beginner skill levels.



4.15 General Preferences of Sports Activities (continued)

Sports you have watched at a stadium:

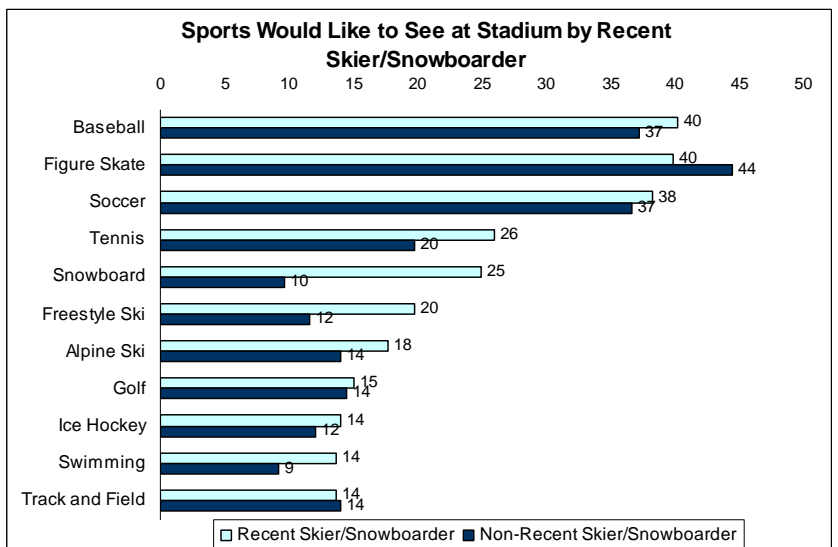
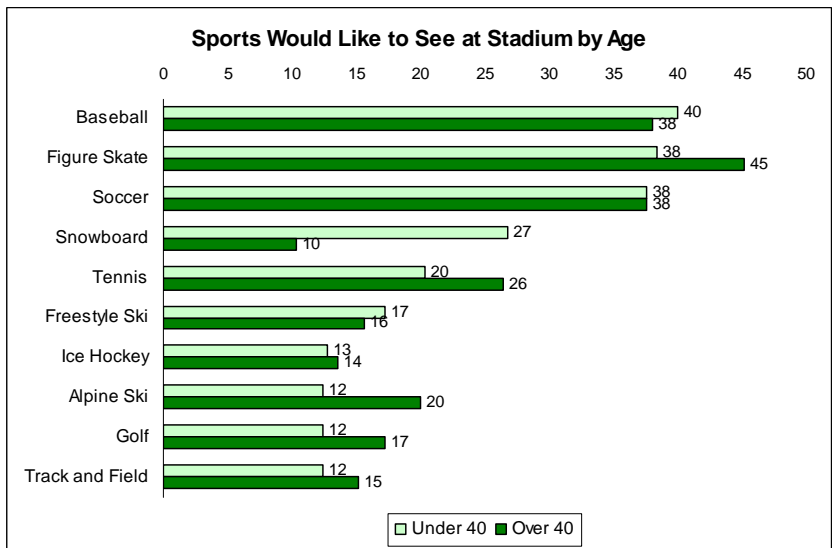
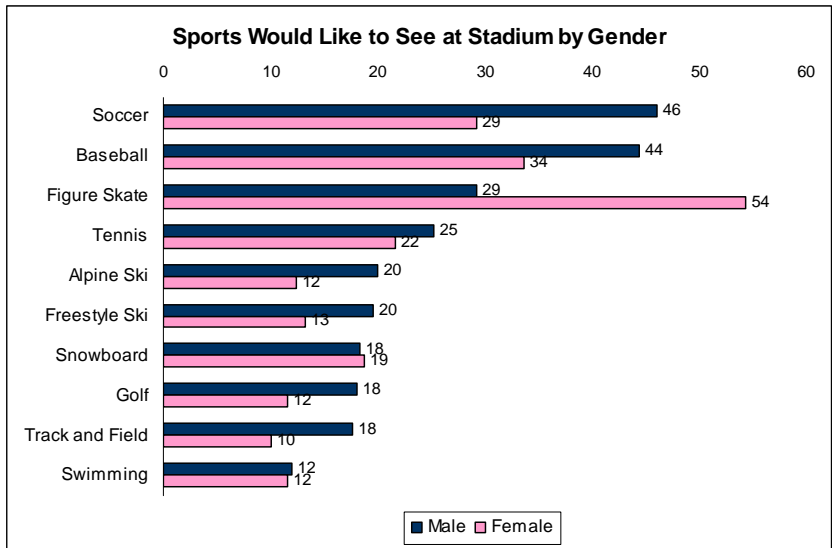
- Respondents were asked about sports they had watched live at a stadium. Responses differed substantially by prior visitation to Canada, gender and age but not by recency of skiing/ snowboarding, frequency of overseas travel and skill level.
- Overall, most frequently mentioned sports included baseball and soccer.
- Respondents who had been to Canada generally had watched more sports at a stadium than did those who had not visited Canada. This was particularly true for figure skating, golf, tennis, ice hockey and alpine skiing.
- Male respondents were more likely to have watched baseball, soccer, golf and track and field at a stadium than were female respondents.
- Older respondents were more likely to have watched tennis, baseball and golf whereas younger respondents were more likely to have watched soccer at a stadium.



4.15 General Preferences of Sports Activities (continued)

Sports you would like to see at a stadium:

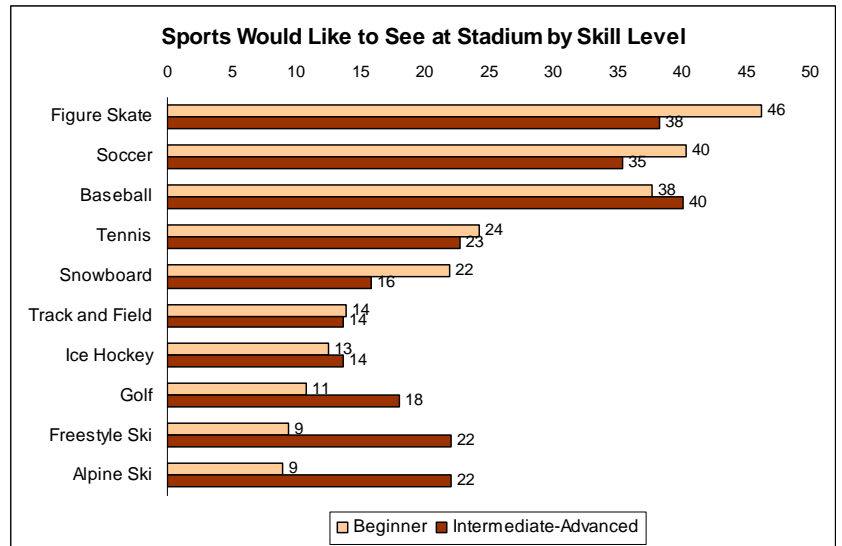
- Respondents were asked about sports they would like to watch at a stadium. Responses differed substantially by gender, age, recency of skiing/snowboarding and skill level but not by prior visitation to Canada or frequency of overseas travel.
- Overall, more frequent responses included figure skating, baseball and soccer.
- Female respondents were more likely to express a desire to watch figure skating whereas male respondents were more likely to want to watch soccer, baseball, alpine and freestyle skiing, and track and field at a stadium.
- Younger respondents were more likely to want to watch snowboarding whereas older respondents were more likely to want to watch alpine skiing, figure skating and tennis at a stadium.
- Recent skiers/snowboarders were more likely to want to watch snowboarding, freestyle skiing, tennis and swimming at a stadium than were those who had not skied or snowboarded recently.



4.15 General Preferences of Sports Activities (continued)

Sports you would like to see at a stadium: (continued)

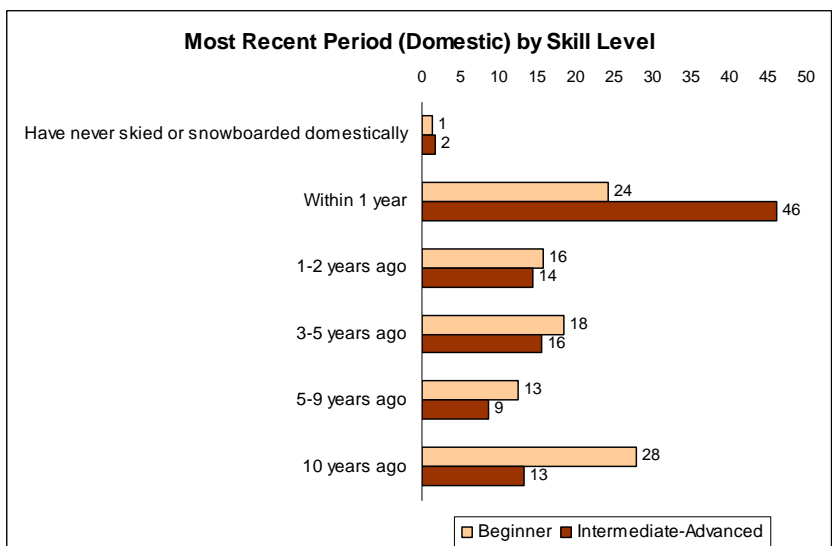
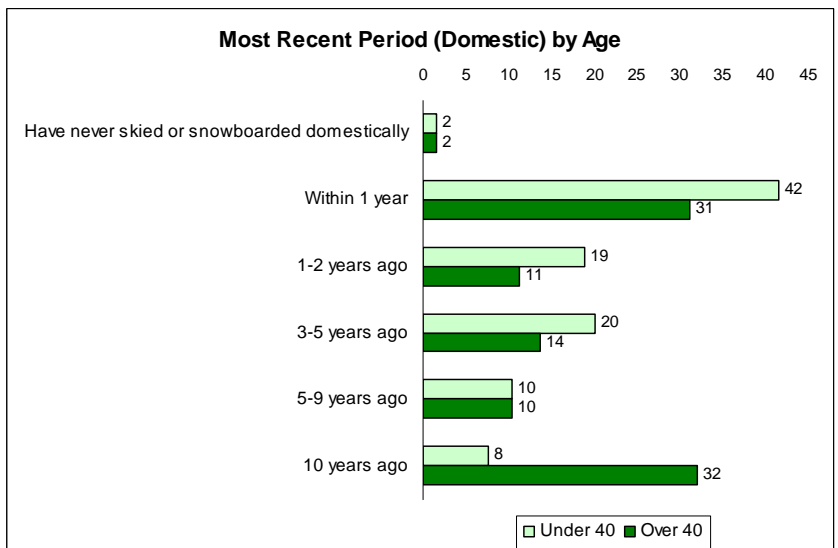
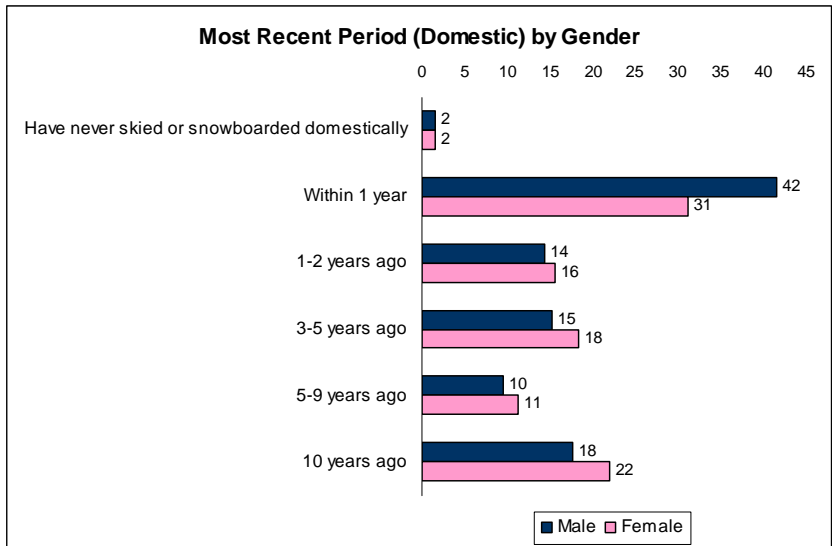
- Respondents with beginner skill levels were more likely to want to watch figure skating, snowboarding and soccer whereas respondents with more advanced skill levels were more likely to prefer to watch alpine skiing, freestyle skiing and golf at a stadium.



4.16 Profile of Domestic Skiing/Snowboarding Trip

When was the most recent period that you did skiing or snowboarding domestically?

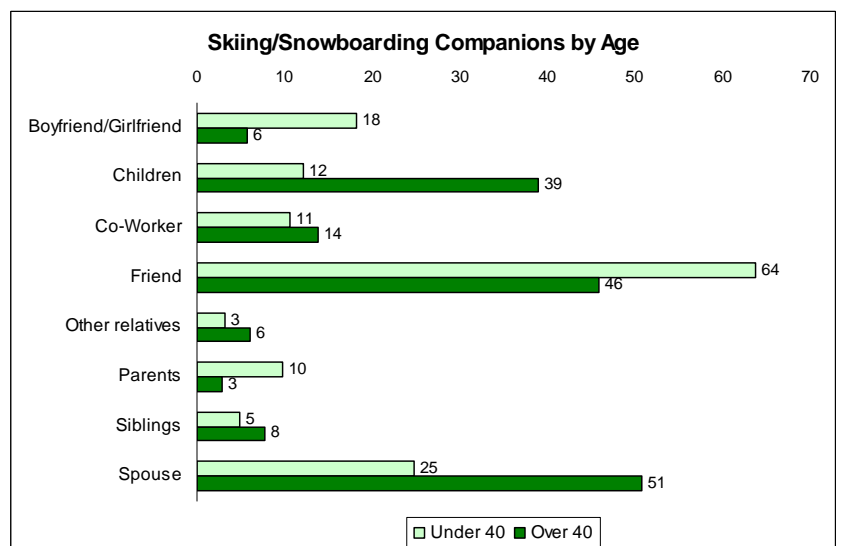
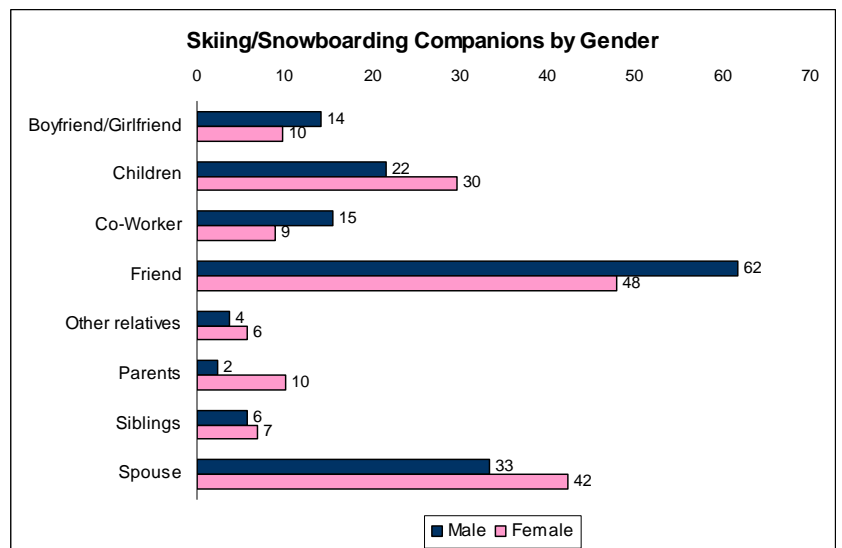
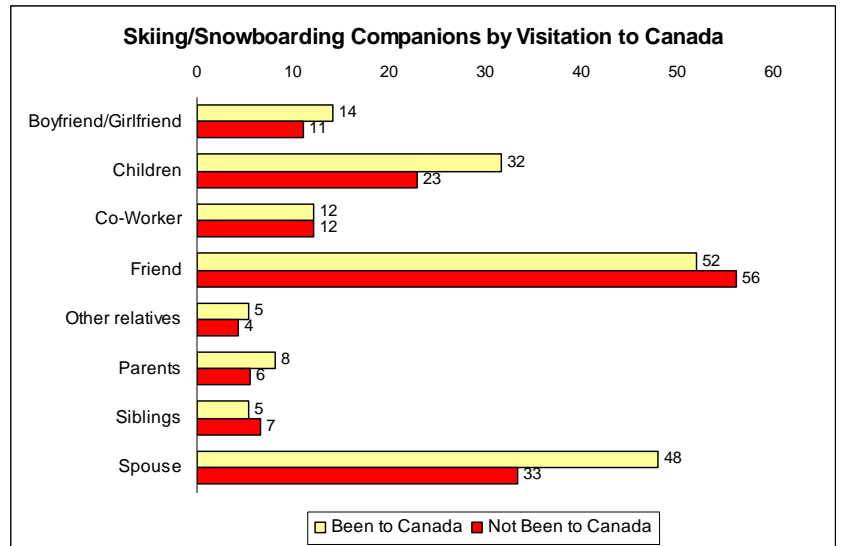
- Respondents were asked when they last went on a domestic ski/snowboard trip. Responses differed substantially by gender, age and skill level but not by prior visitation to Canada, recency of skiing/snowboarding or frequency of overseas travel.
- Compared to female respondents, a higher proportion of male respondents had skied within the last year.
- A higher proportion of younger respondents had skied within the past year in particular and within the past 5 years in general, whereas a significantly higher proportion of older respondents had not skied for at least 10 or more years.
- Respondents with beginner skill levels were more likely to have last skied/snowboarded 10 or more years ago whereas those with more advanced skills were more likely to have skied/snowboarded within the past year.



4.16 Profile of Domestic Skiing/Snowboarding Trip (continued)

Who did you go skiing or snowboarding with? - domestic

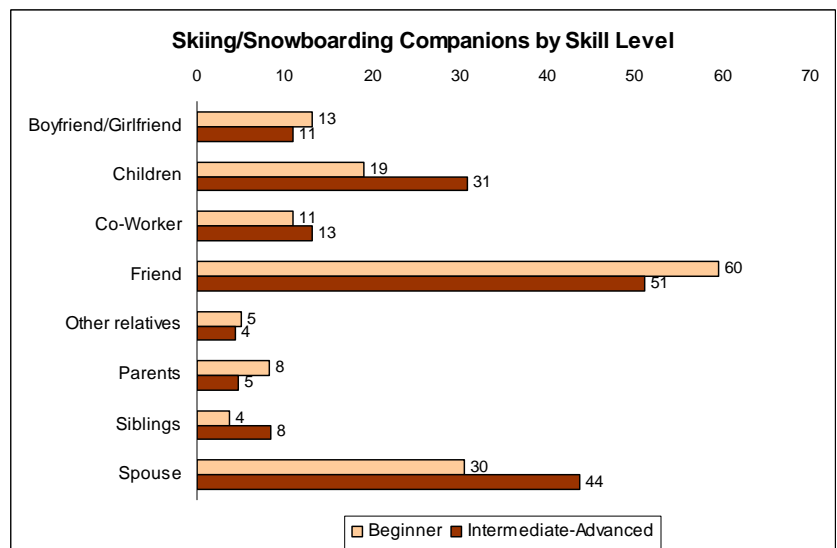
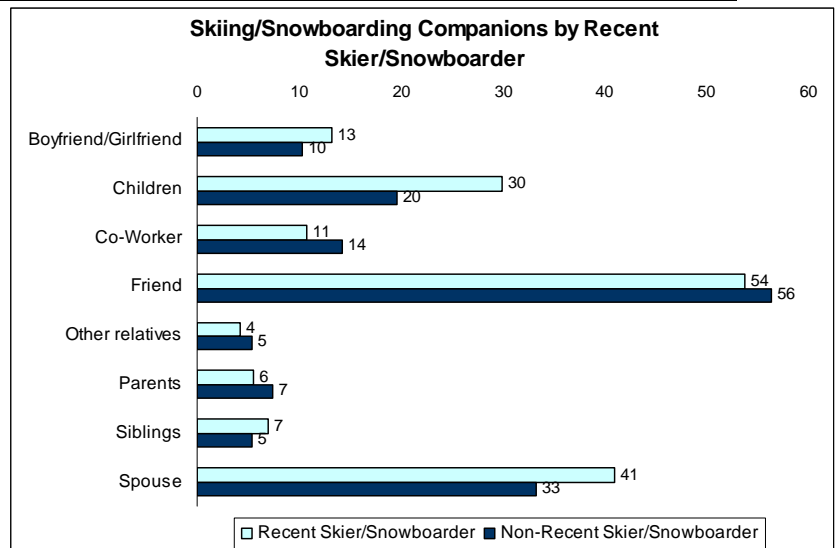
- Respondents were asked about travel companions on their last domestic ski/snowboard trip. Responses differed substantially by prior visitation to Canada, gender, age, recency of skiing/snowboarding and skill level but not by frequency of overseas travel.
- Overall, friends, spouse and children were mentioned most frequently by all respondents.
- Respondents who had previously visited Canada were more likely to have been accompanied by their spouse or children on their most recent domestic ski/snowboard trip compared to those who had never been to Canada.
- Male respondents were more likely to have gone skiing/snowboarding domestically with friends or co-workers whereas female respondents were more likely to have gone with their spouse, parents or children.
- Younger respondents were more likely to have gone skiing/snowboarding with friends, boyfriend/girlfriend or their parents whereas older respondents were more likely to have gone with children or spouse on their most recent domestic ski/snowboard trip.



4.16 Profile of Domestic Skiing/Snowboarding Trip (continued)

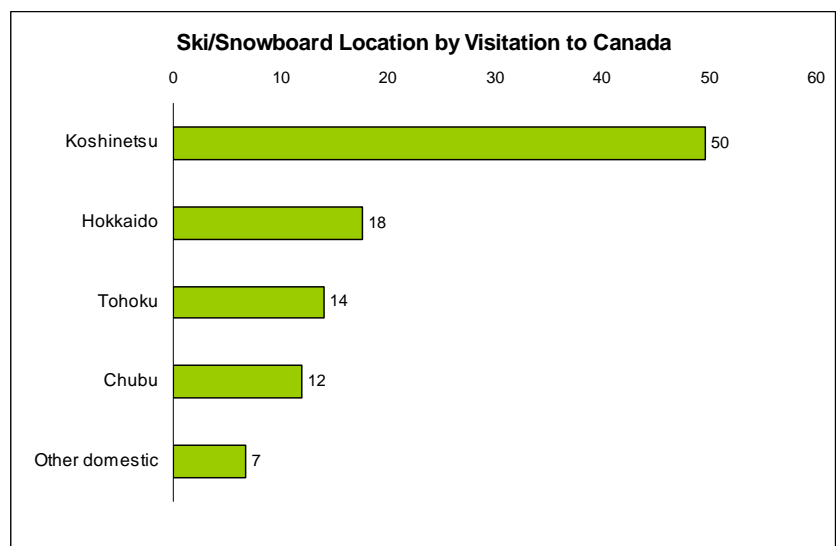
Who did you go skiing or snowboarding with? - domestic (continued)

- Recent skiers/snowboarders were more likely to have travelled with their children or spouse on their most recent domestic ski/snowboard trip than were those who had not skied or snowboarded recently.
- Respondents with beginner level skills were more likely to have gone skiing/snowboarding with friends whereas intermediate-advanced skiers were more likely to have gone with their spouse or children on their most recent skiing/snowboarding domestic trip.



Where did you go?

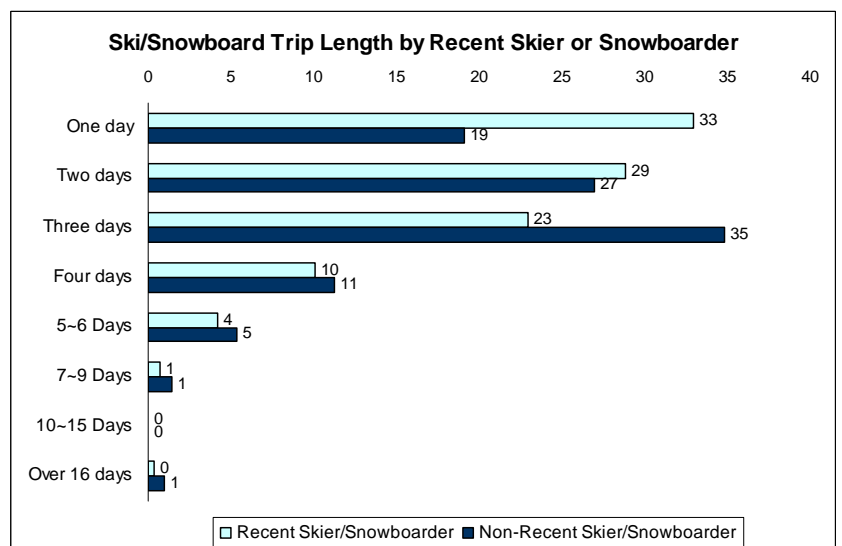
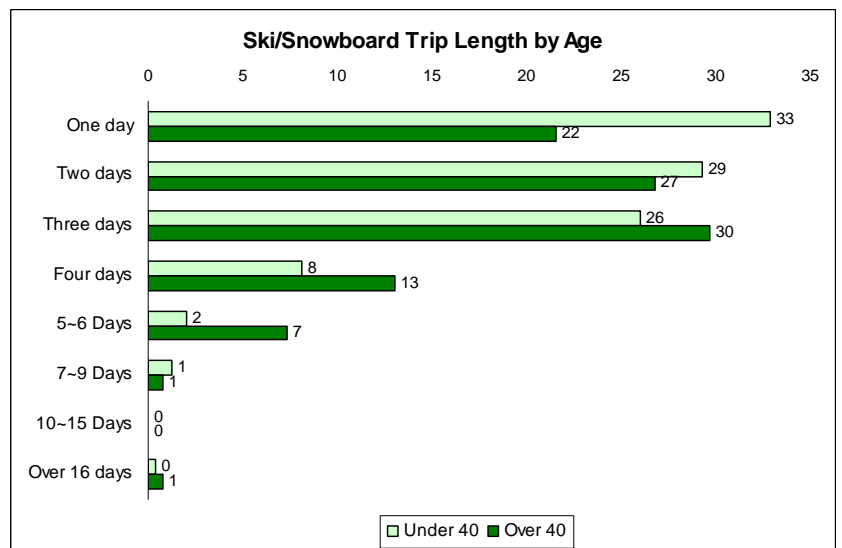
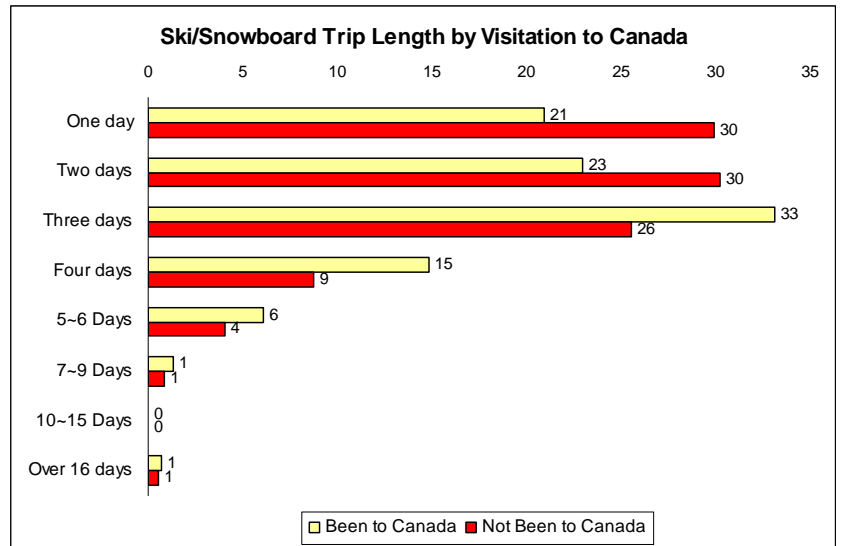
- There were no significant differences in response based on prior visitation to Canada, gender, age, recency of skiing/snowboarding, frequency of overall travel or skill level.
- Koshinetsu was the most popular domestic ski areas as it was visited by half of all respondents. Other less popular sites visited by respondents included Hokkaido, Tohoku and Chubu.



4.16 Profile of Domestic Skiing/Snowboarding Trip (continued)

For how long?

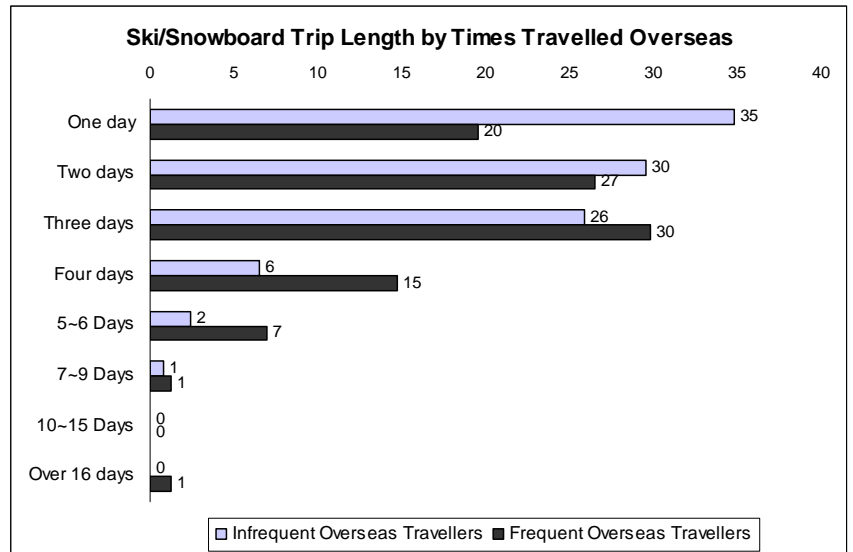
- Respondents were asked about the length of their most recent domestic skiing/snowboarding trip. Responses differed substantially by prior visitation to Canada, age, recency of skiing/snowboarding and frequency of overseas travel but not by gender or skill level.
- Most frequently mentioned trip lengths for all respondents included 2 days, 3 days and 1 day.
- Respondents who had previously been to Canada were more likely to take trips of 3 and 4 days whereas respondents who had not visited Canada in the past were more likely to take shorter domestic trips (e.g. less than 2 days).
- Younger respondents were more likely to have taken day trips whereas older respondents were more likely to have spent more than 3 days on their last domestic ski/snowboard trip.
- Recent skiers/snowboarders were much more likely to have taken day trips whereas those who did not ski or snowboard recently were more likely to have taken longer trips that lasted 3 days during their most recent domestic ski/ snowboard trip.



4.16 Profile of Domestic Skiing/Snowboarding Trip (continued)

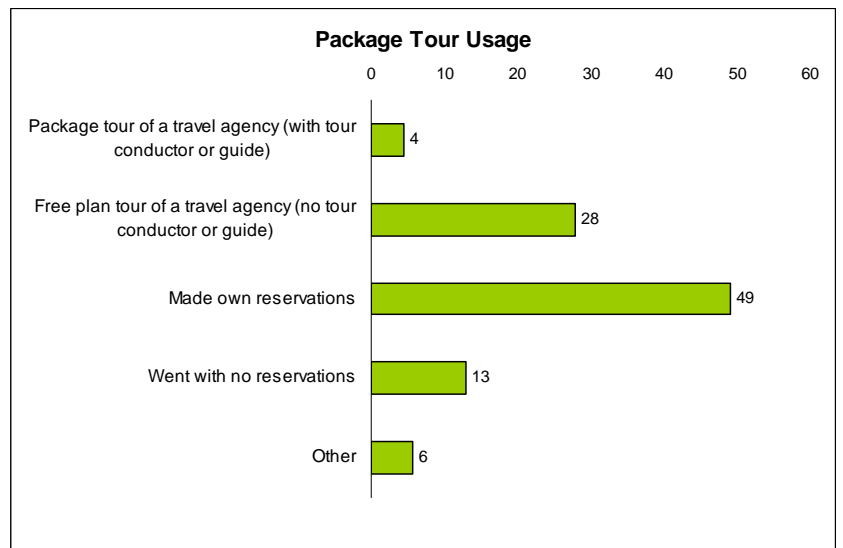
For how long? (continued)

- Infrequent overseas travellers were more likely to have taken domestic ski/snowboarding trips that lasted a day whereas those who frequently travelled overseas were more likely to have taken trips that lasted more than 3 days on their last domestic ski/snowboard trip.



Did you go on a package tour of a travel agency?

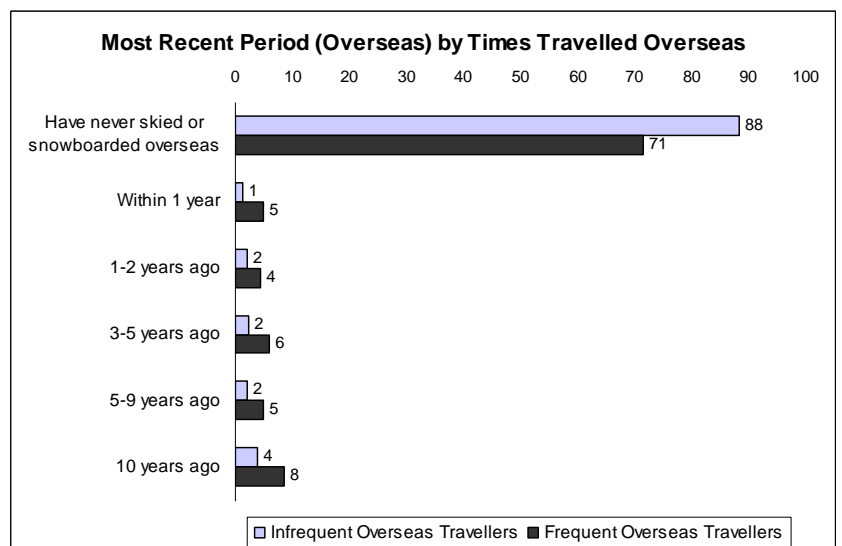
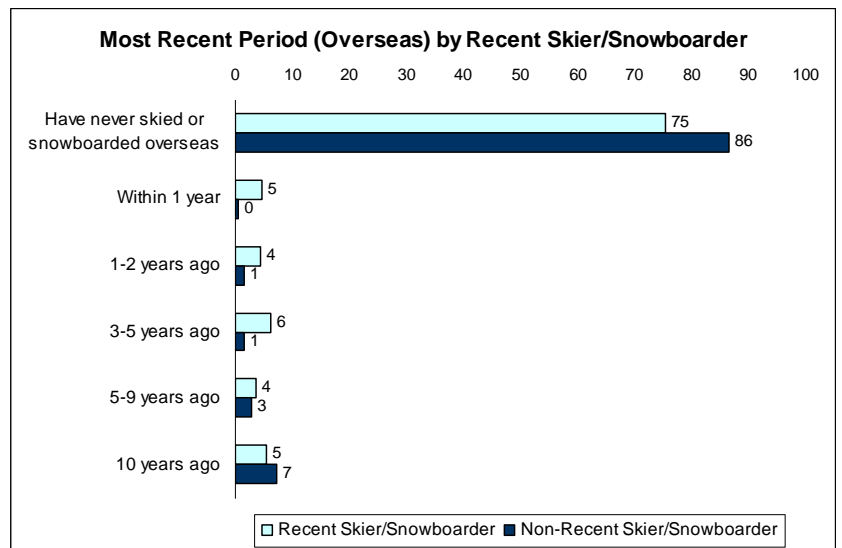
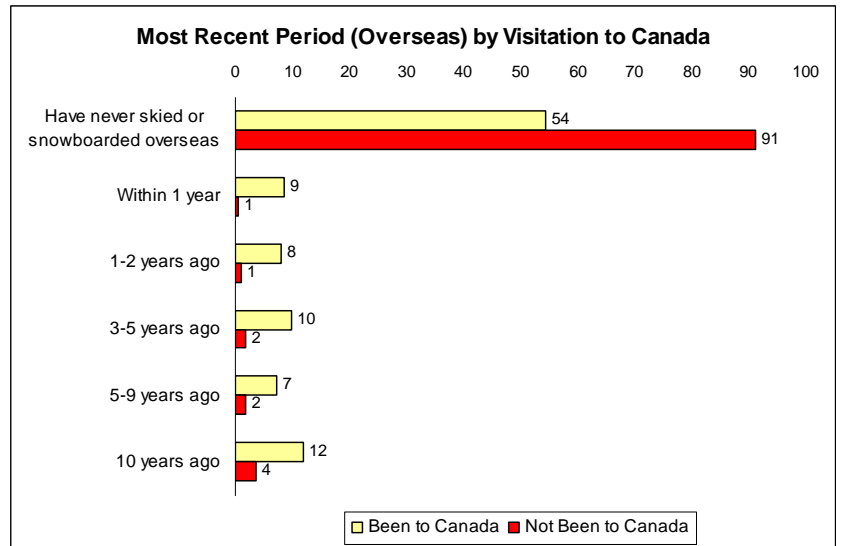
- There were no significant differences in response based on prior visitation to Canada, gender, age, recency of skiing/snowboarding, frequency of overall travel or skill level.
- Overall, almost half of all respondents made their own reservations for their domestic ski/snowboard trip whereas only a third of all respondents used the services of a travel agency for either a free tour plan or a package tour. A smaller proportion did not make any reservations at all.



4.17 Profile of Overseas Skiing/Snowboarding Trip

When was the most recent period that you did skiing or snowboarding overseas?

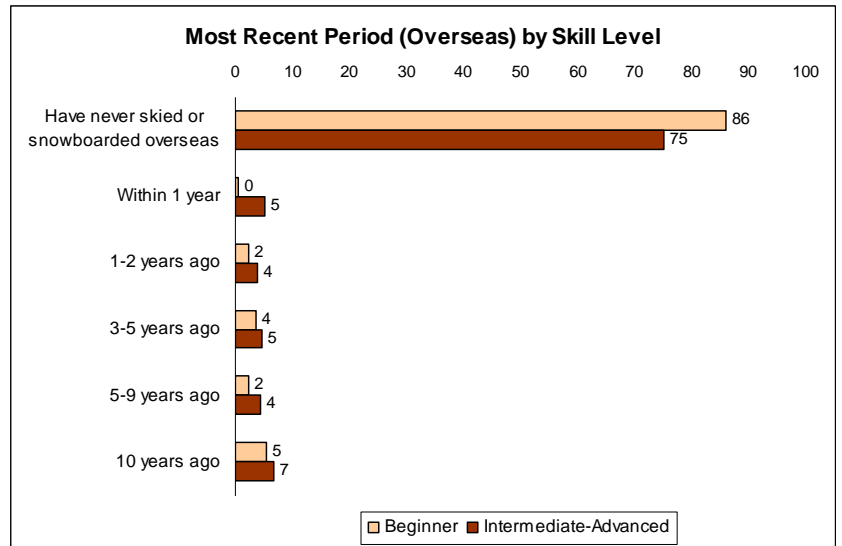
- Respondents were asked about the most recent period in which they skied or snowboarded overseas. Responses differed substantially by prior visitation to Canada, recency of skiing/snowboarding, frequency of overseas travel and skill level but not by gender or age.
- Overall, around three quarters of all respondents had never skied/snowboarded overseas.
- The majority of respondents who had not been to Canada had never skied or snowboarded overseas. Over half of those who had previously visited Canada had never skied or snowboarded overseas.
- The majority of non-recent skiers/snowboarders had never skied or snowboarded overseas. This was also true, but to a lesser extent, for respondents who had skied/snowboarded recently.
- The majority of infrequent overseas travellers had never skied/snowboarded overseas. This was also true, but to a lesser extent, for those who frequently travelled overseas.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

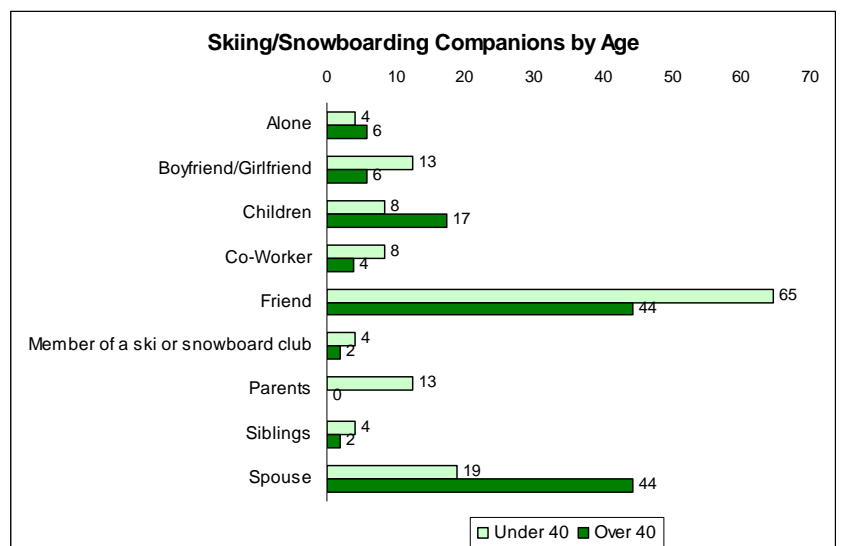
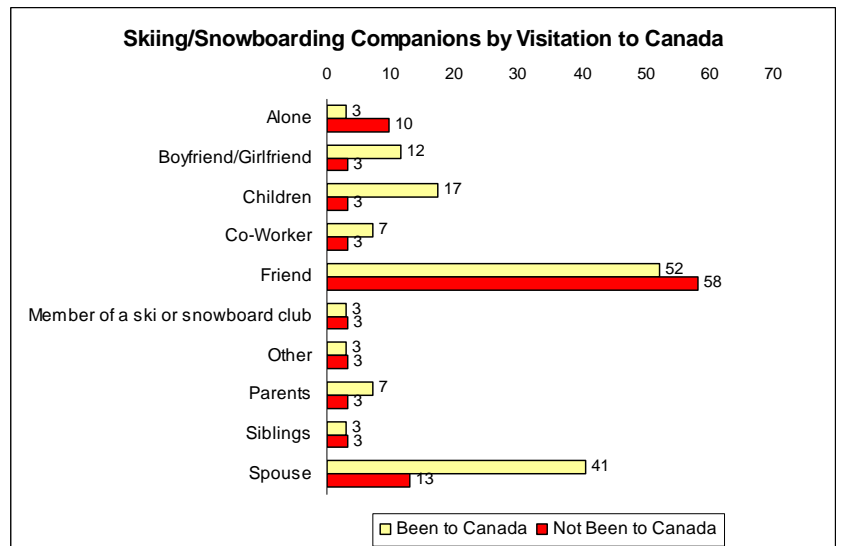
When was the most recent period that you did skiing or snowboarding overseas?
(continued)

- The majority of respondents with beginner skill levels had never skied/snowboarded overseas. This was also true, but to a lesser extent, for respondents with intermediate-advanced skill levels.



Who did you go skiing or snowboarding with? - overseas

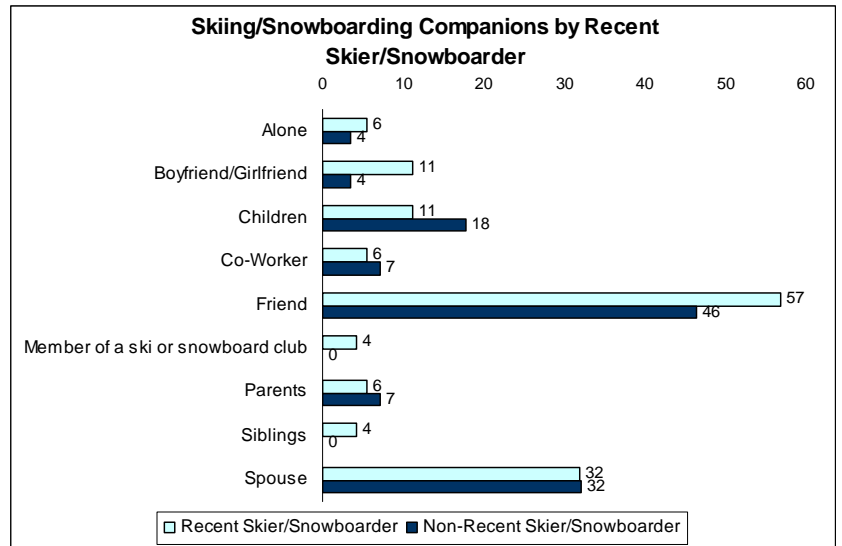
- Respondents were asked about their travel companions on their most recent overseas ski/snowboard trip. Responses differed substantially by prior visitation to Canada, age, recency of skiing/snowboarding and skill level but not by gender and frequency of overseas travel.
- Overall, friends, spouse and children were mentioned most frequently by all respondents.
- Respondents who had previously visited Canada were more likely to have travelled with their spouse, children or boyfriend/girlfriend whereas those who had not been to Canada were more likely to have gone with friends or on their own.
- Younger respondents were more likely to have travelled with friends, parents or boyfriend/ girlfriend whereas older respondents were more likely to have travelled with their spouse or children.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

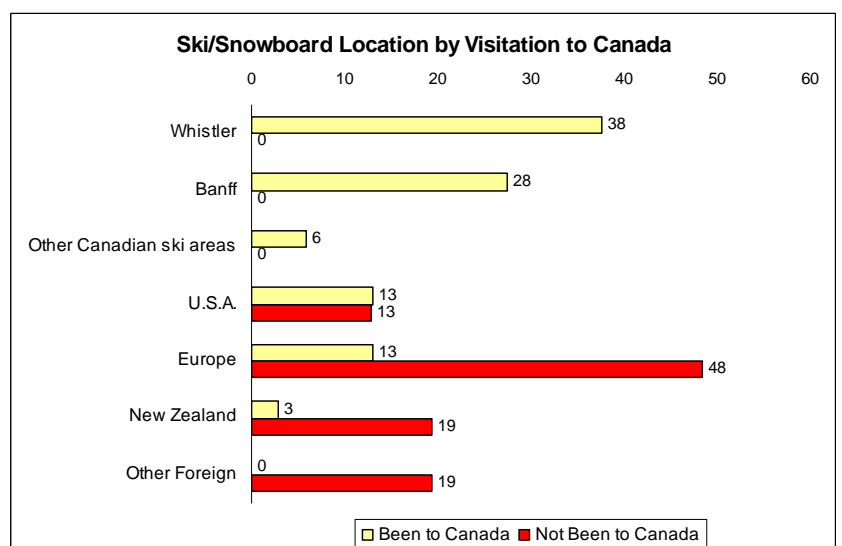
Who did you go skiing or snowboarding with? - overseas

- Recent skiers/snowboarders were more likely to have travelled with friends or their boyfriend/ girlfriend whereas those who had not skied or snowboarded recently were more likely to have travelled with children on their most overseas ski/snowboard trip.
- Respondent with beginner skill levels were more likely to have travelled with their parents whereas those with intermediate-advanced skill levels were more likely to have travelled with their spouse.



Where did you go?

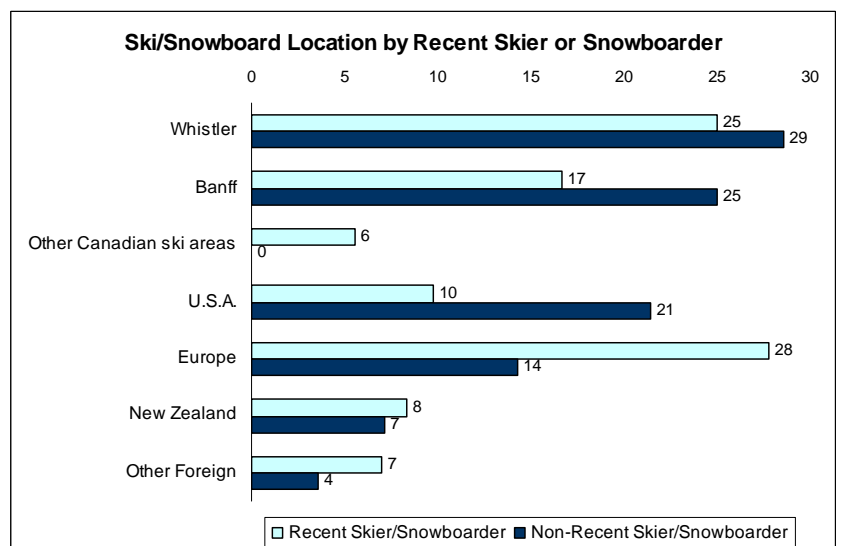
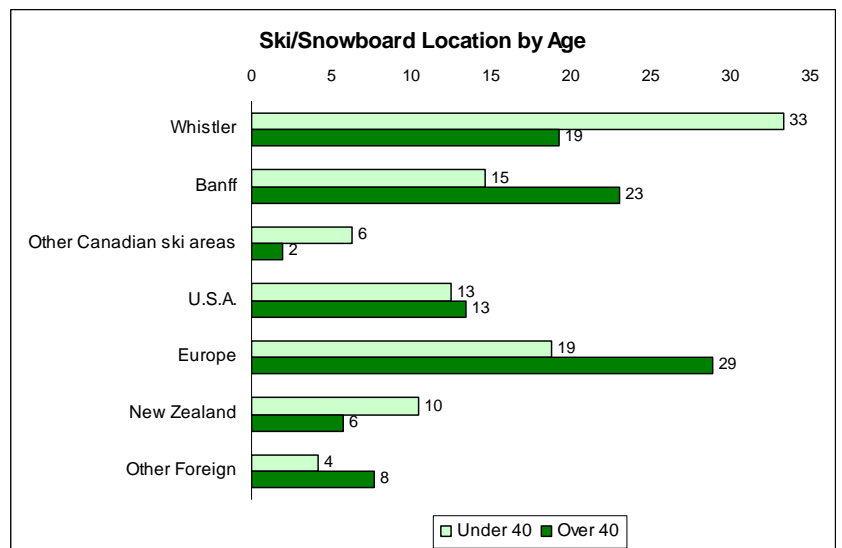
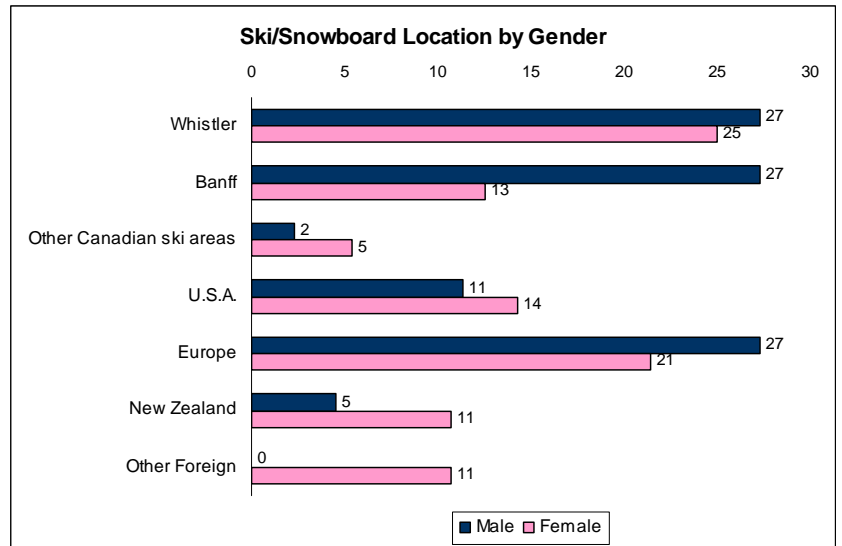
- Respondents were asked about where they went skiing/snowboarding overseas on their most recent trip. Responses differed substantially by almost all respondent segments used for this analysis.
- Respondents who had not been to Canada were more likely to have gone to Europe, New Zealand and other foreign destinations on their last overseas ski/snowboard trip.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

Where did you go? (continued)

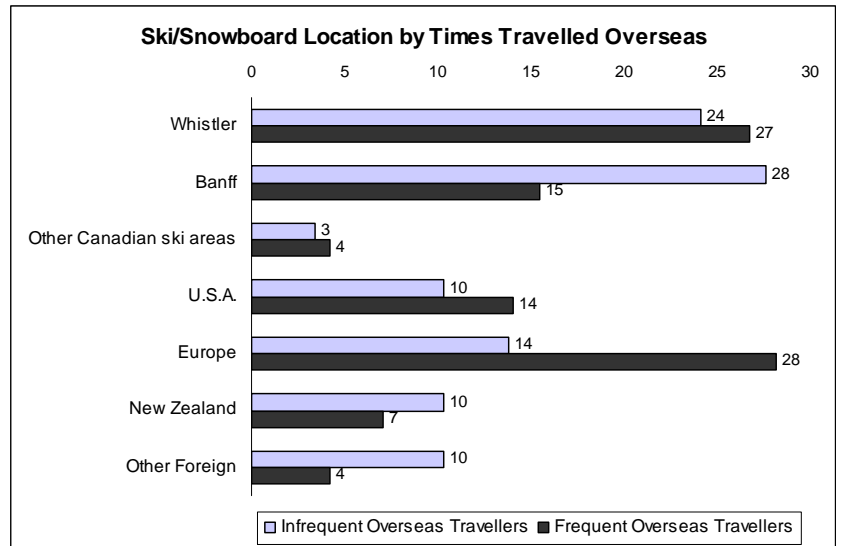
- Male respondents were more likely to have gone to Banff and European destinations whereas female respondents were more likely to have gone to New Zealand and other foreign ski destinations when skiing/snowboarding overseas.
- Younger respondents were much more likely to have skied at Whistler whereas older respondents were more likely to have skied at Banff and European destinations when skiing/snowboarding overseas.
- Recent skiers/snowboarders were more likely to have skied at European destinations and other Canadian ski areas whereas non-recent skiers/snowboarders were more likely to have skied at Banff and ski areas in the United States when skiing/snowboarding overseas.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

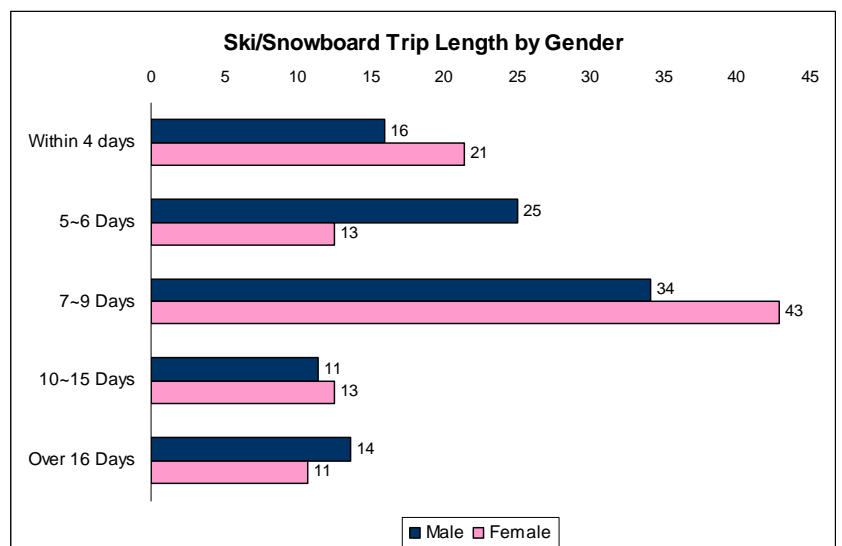
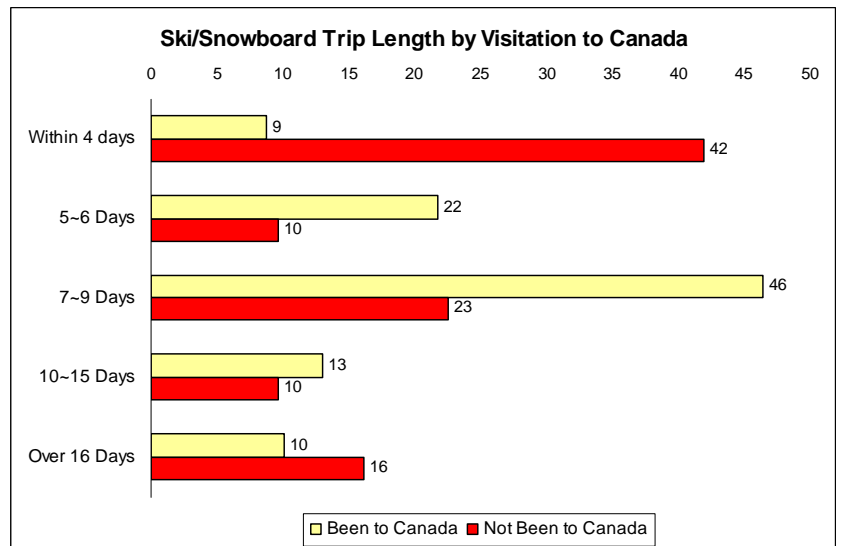
Where did you go? (continued)

- Infrequent overseas travellers were more likely to have skied at Banff whereas those who travelled more frequently were more likely to have gone to European destinations when skiing/snowboarding overseas.



For how long?

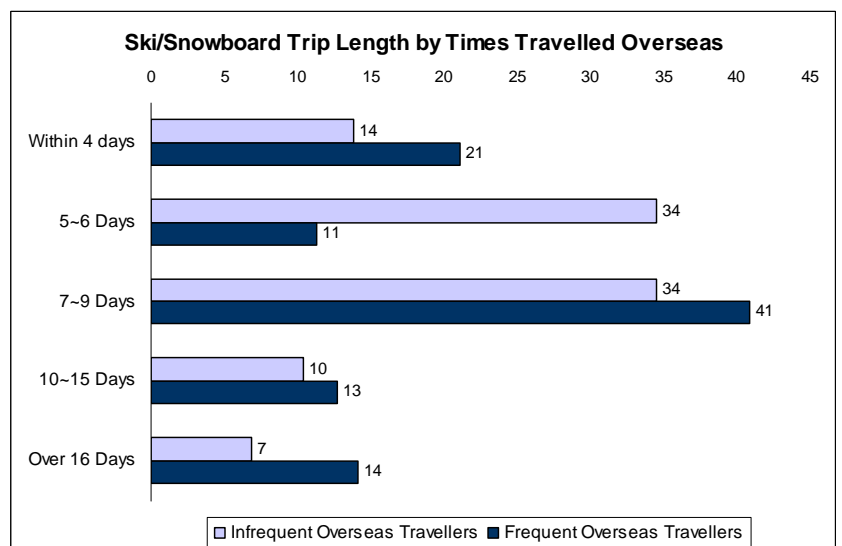
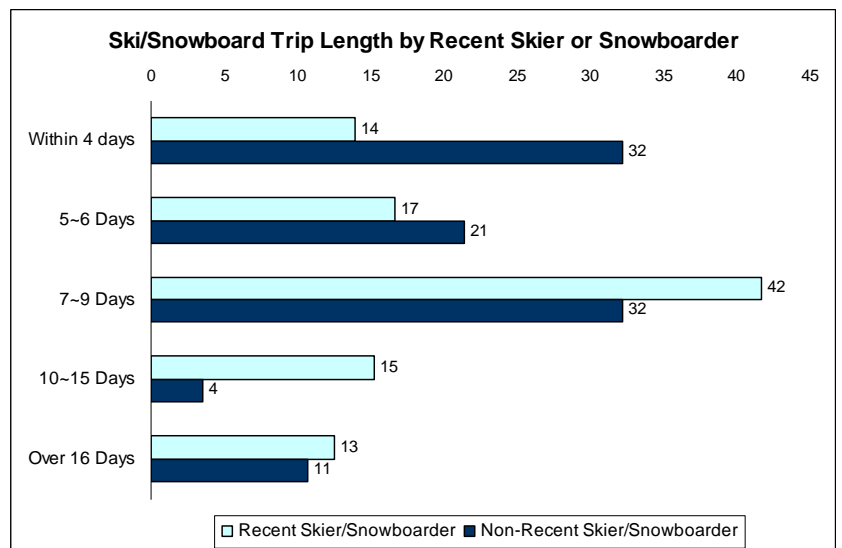
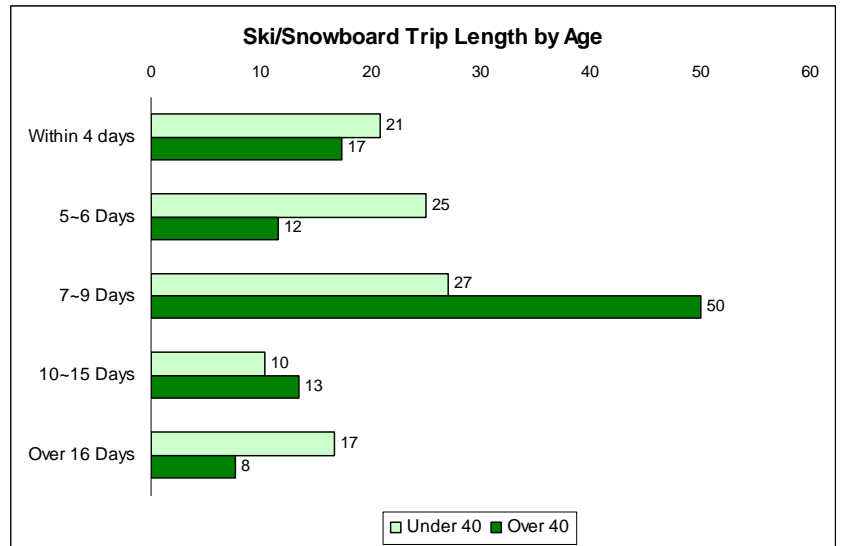
- Respondents were asked to indicate the length of their last overseas ski/snowboard trip. Responses differed substantially by all respondent segments used in this analysis.
- Respondents who had been to Canada were more likely to have taken trips of 5-6 and 7-9 days in length whereas those who had never been to Canada were much more likely to have taken trips that lasted 4 or fewer days in duration when skiing/snowboarding overseas.
- Male respondents were more likely to have taken trips of 5-6 days in duration whereas female respondents were more likely to have taken trips that lasted 7-9 days or less than 4 days in duration when skiing/snowboarding overseas.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

For how long? (continued)

- Younger respondents were more likely to have taken trips that were 5-6 days or over 16 days in duration whereas older respondents were more likely to have taken trips that were 7-9 days long.
- Recent skiers/snowboarders were more likely to have taken trips that were 7-9 or 10-15 days long whereas non-recent skiers/snowboarders were more likely to have taken shorter trips that lasted up to 4 days when skiing/snowboarding overseas.
- Infrequent overseas travellers were more likely to have taken trips that were 5-6 days long whereas frequent overseas travellers were more likely to have taken both shorter trips (up to 4 days in length) and longer trips (over 16 days in duration) when skiing/snowboarding overseas.



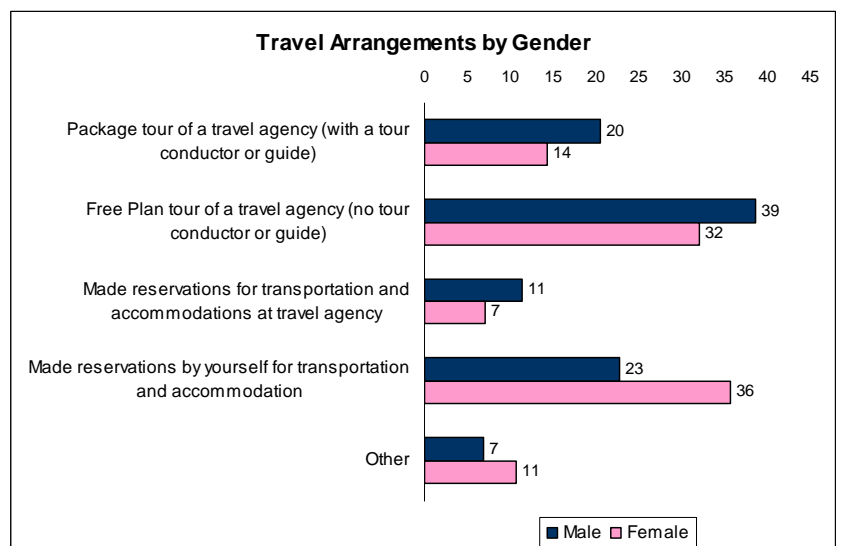
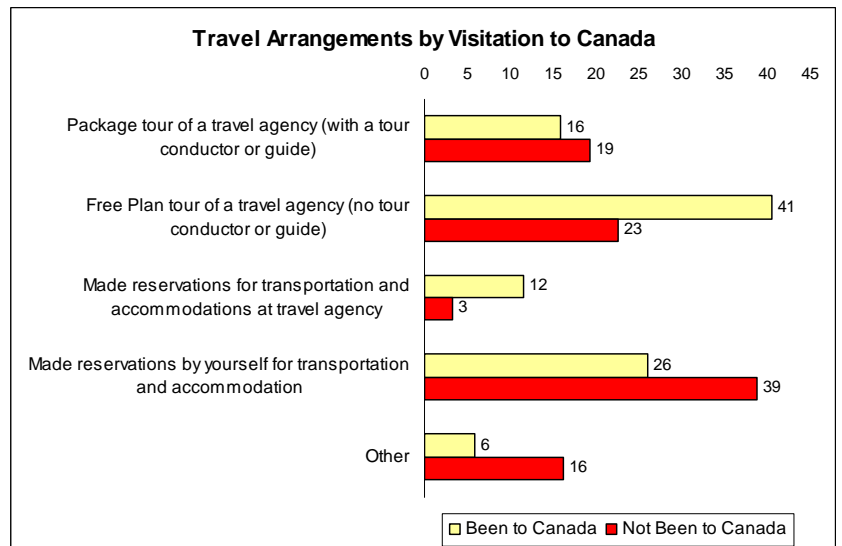
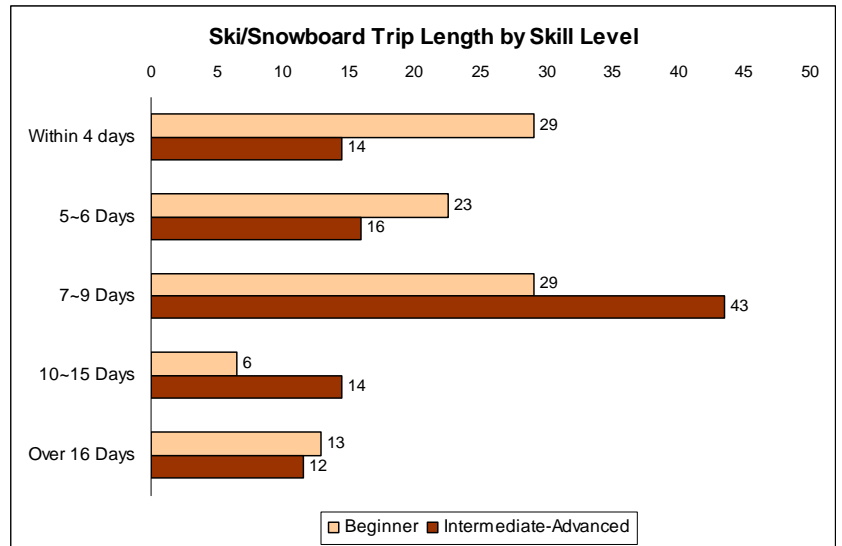
4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

For how long? (continued)

- Respondents with beginner skill levels were more likely to have taken shorter trips of up to 4 days or 5-6 days in length whereas intermediate-advanced skiers were more likely to have taken longer trips that were 7-9 or 10-15 days in duration when skiing/snowboarding overseas.

How did you travel?

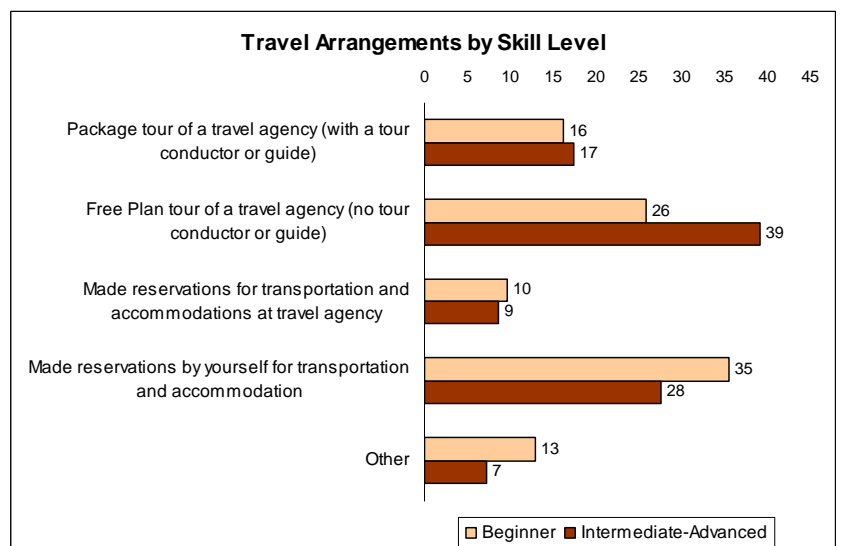
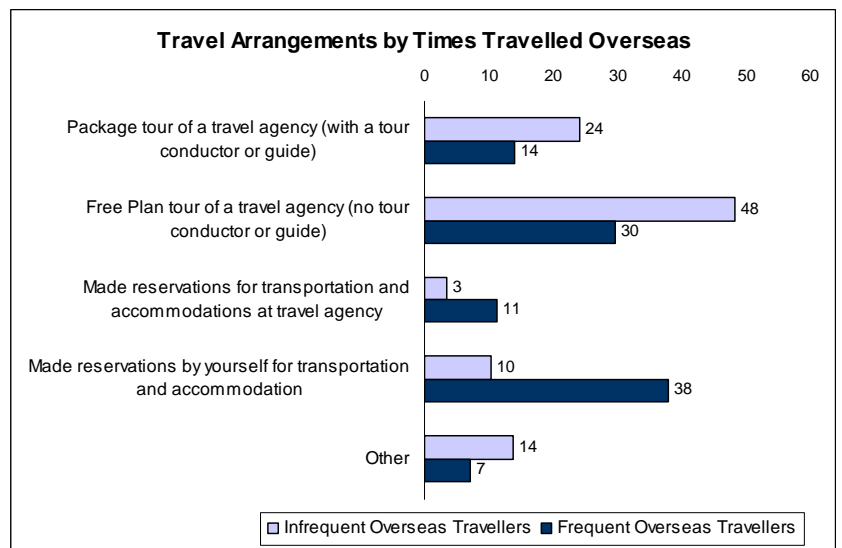
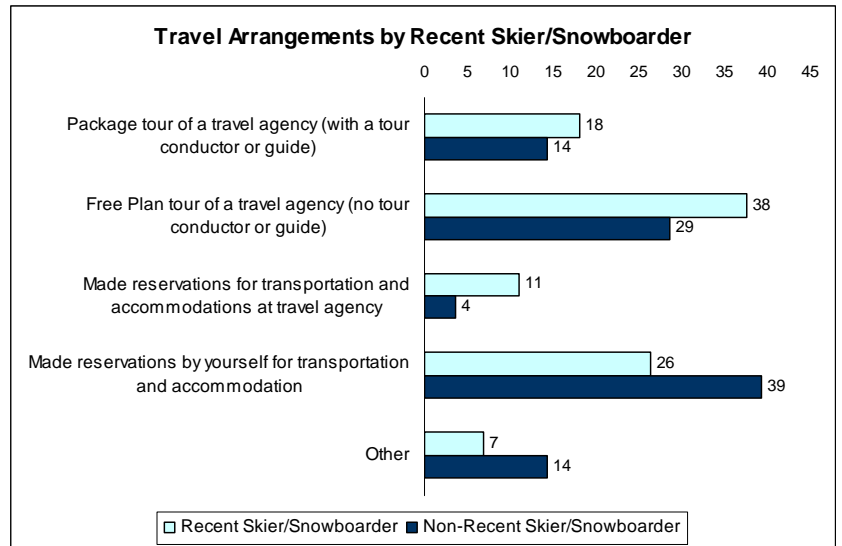
- Respondents were asked about their travel arrangements on their overseas ski/snowboarded trip. Responses differed substantially by almost all respondent segments used in this analysis.
- Overall, free plan tours through travel agency and self made arrangements were mentioned most frequently follow up by package tours.
- Respondents who had been to Canada were more likely to have used a free tour plan through a travel agency whereas those who had not been to Canada were more likely to have made their own reservations when skiing/snowboarding overseas.
- Male respondents were more likely to have used services of a travel agency (package tour, free plan tour) whereas female respondents were more likely to have made their own reservations/arrangements for transportation and accommodation when skiing/snowboarding overseas.



4.17 Profile of Overseas Skiing/Snowboarding Trip (continued)

How did you travel? (continued)

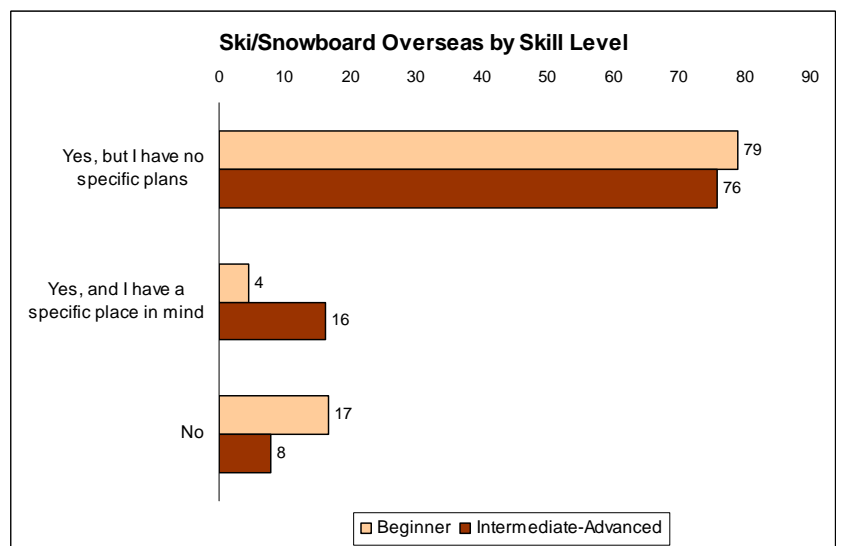
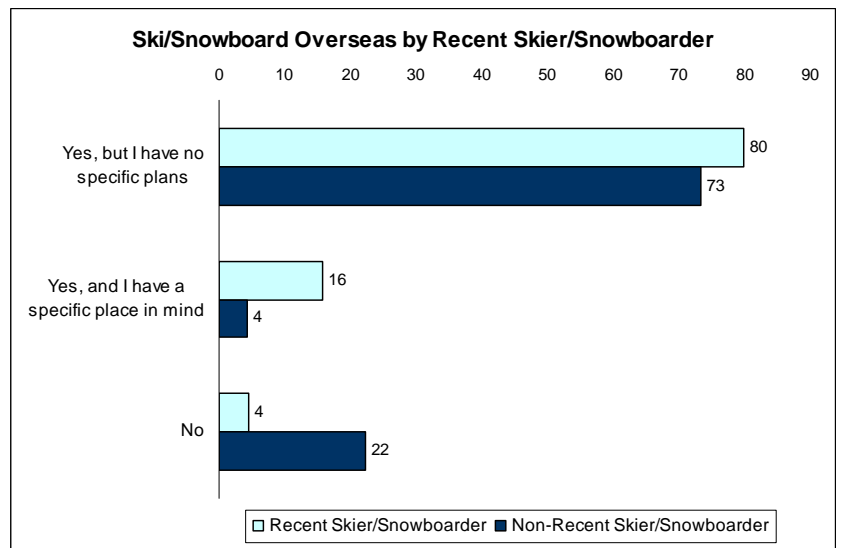
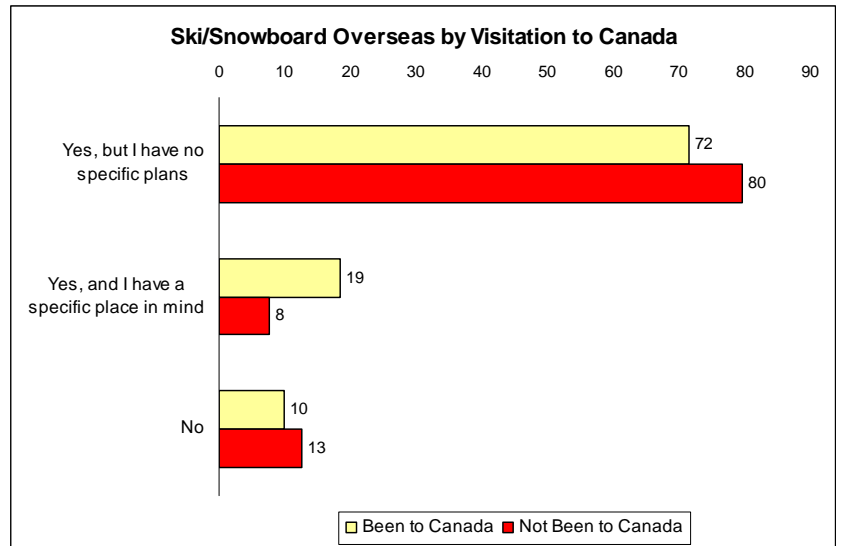
- Recent skiers/snowboarders were more likely to have used a free tour plan or made reservations for transportation and accommodation through a travel agency whereas non recent skiers/snowboarders were more likely to have made their own reservations for transportation and accommodation when skiing/snowboarding overseas.
- When making their travel arrangements, infrequent overseas travellers were more likely to have used a free tour plan or package from a travel agency whereas frequent overseas travellers were more likely to have made transportation and accommodation arrangements on their own.
- Respondents with beginner skill levels were more likely to have made their own arrangements whereas those with advanced-intermediate skill levels were more likely to have used the free plan tour offered by travel agents when making arrangements for their overseas ski/ snowboard trip.



4.18 Potential and Barrier of Skiing/Snowboarding Trip

Would you like to go skiing or snowboarding within the next 2 years?

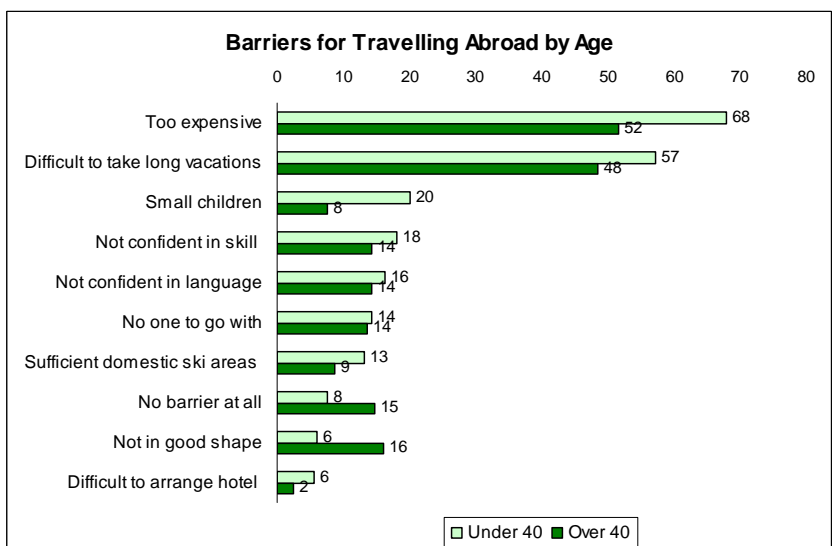
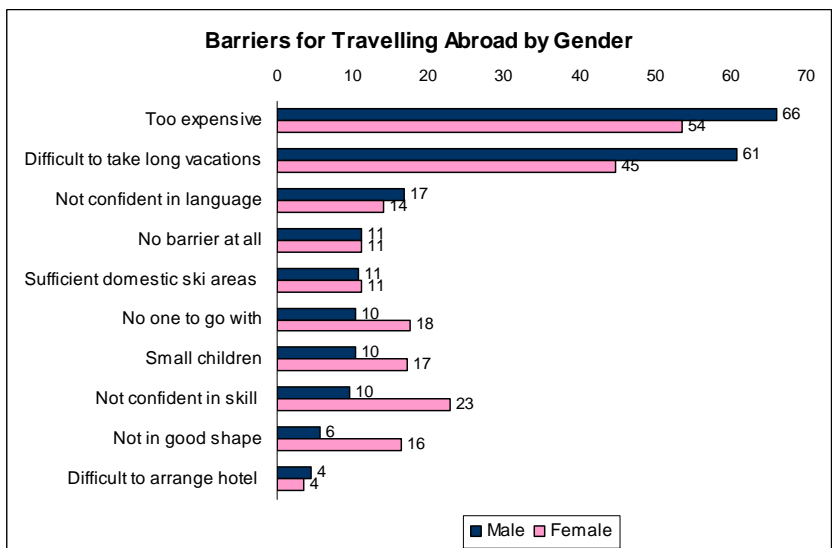
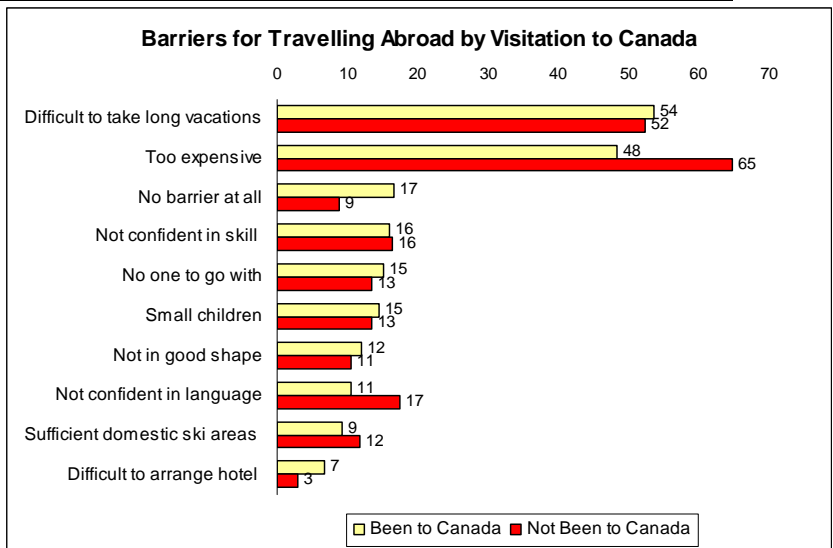
- Respondents were asked about their interest in going skiing or snowboarding within the next two years. Responses differed substantially by prior visitation to Canada, recency of skiing/snowboarding and skill level but not by gender, age or frequency of overseas travel.
- In general, a majority of all respondents wanted to go skiing/ snowboarding within the next two years but had no specific plans.
- Respondents who had been to Canada were more likely to have a specific place in mind for skiing/snowboarding within the next two years whereas respondent who had not been to Canada expressed higher levels of interest in skiing/ snowboarding within the next two years but did not have any specific plans at this time.
- Regardless of whether they had specific plans or a place in mind, recent skiers/ snowboarders expressed higher interest in skiing/ snowboarding within the next two years.
- A higher proportion of respondents with beginner skill levels did not have any intention of skiing/ snowboarding within the next two years whereas those with intermediate-advanced skill levels were more likely to have specific places in mind for their future ski/snowboard trip.



4.18 Potential and Barrier of Skiing/Snowboarding Trip (ctd.)

Barriers for travelling abroad to ski or snowboard:

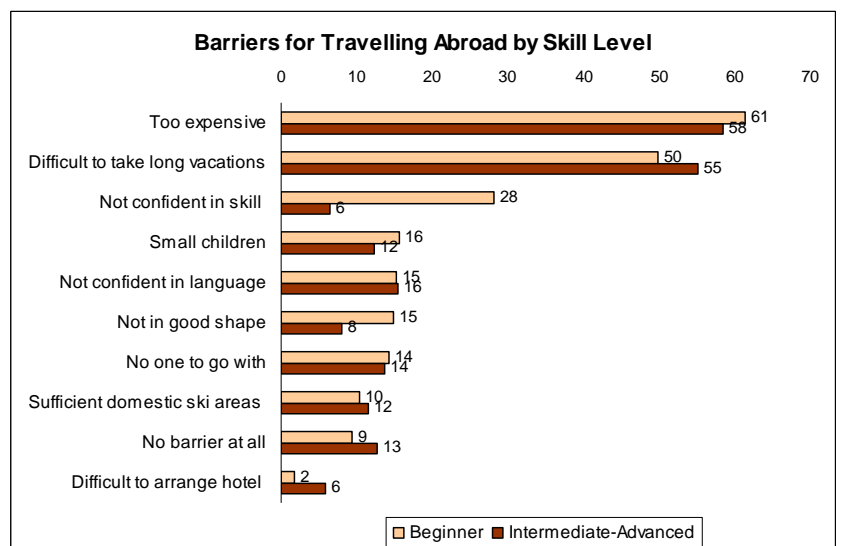
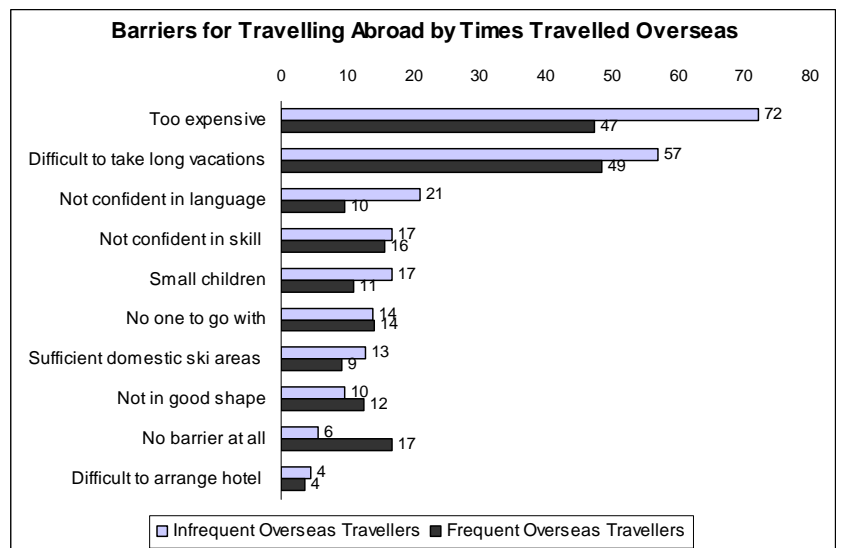
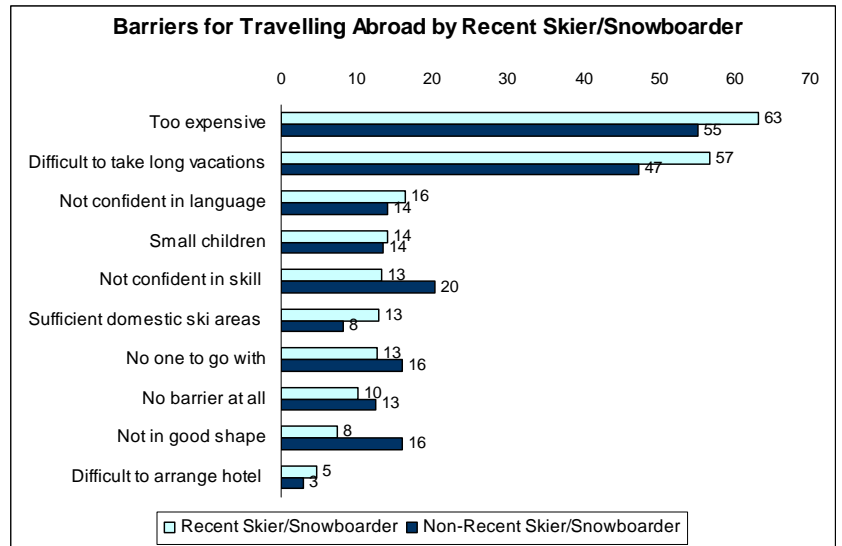
- Respondents were asked about barriers that prevented them from travelling abroad to ski/snowboard. Responses differed substantially by all respondent segments used in this analysis.
- Overall, 'too expensive' and 'difficult to take long vacations' were cited most often by all respondents.
- Respondents who had not been to Canada were more likely to cite cost and a lack of confidence in the language as reasons for not having travelled abroad for skiing/snowboarding.
- Male respondents were more likely to cite difficulties in taking long vacations and cost as reasons for not travelling abroad to ski/snowboard whereas female respondents were more likely to cite lack of confidence in their skills, being out of shape, not having someone to go with or having small children as barriers.
- Younger respondents were more likely to cite cost, small children and difficulties in taking long vacations whereas older respondents were more likely to cite being out of shape as a reason for not travelling abroad to ski/snowboard.



4.18 Potential and Barrier of Skiing/Snowboarding Trip (ctd.)

Barriers for travelling abroad to ski or snowboard: (continued)

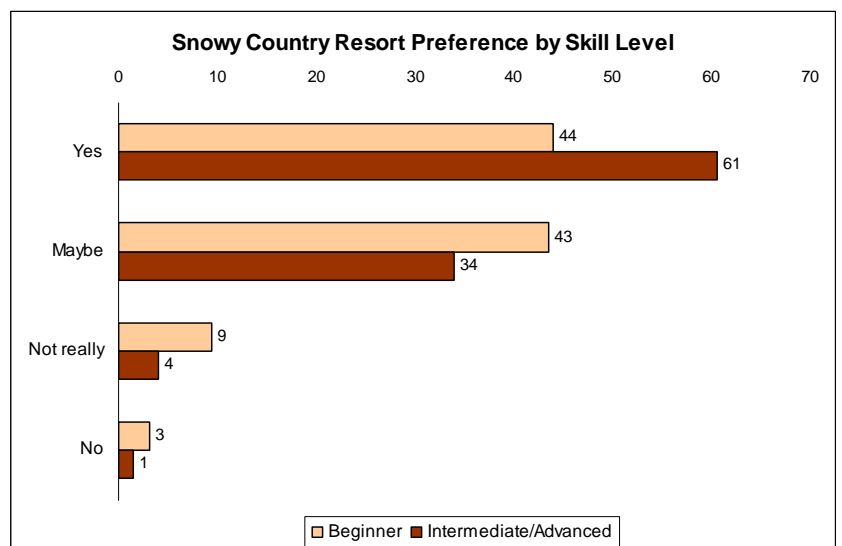
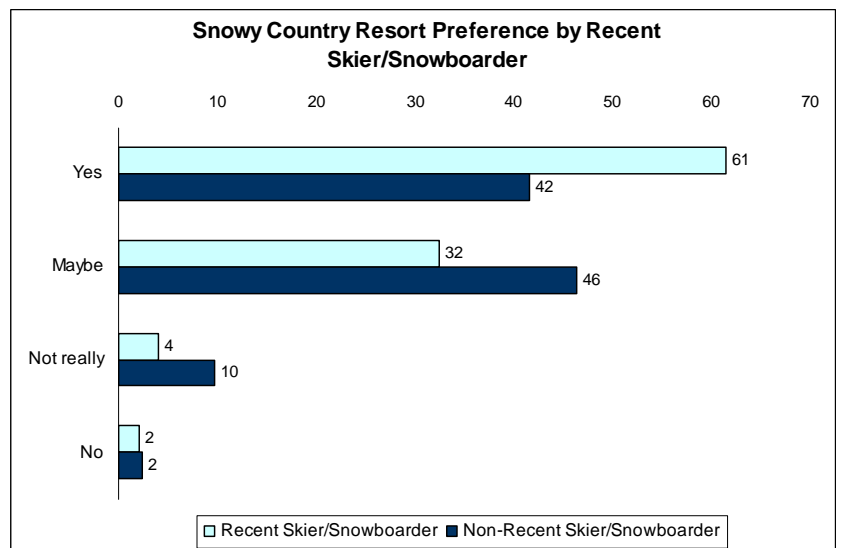
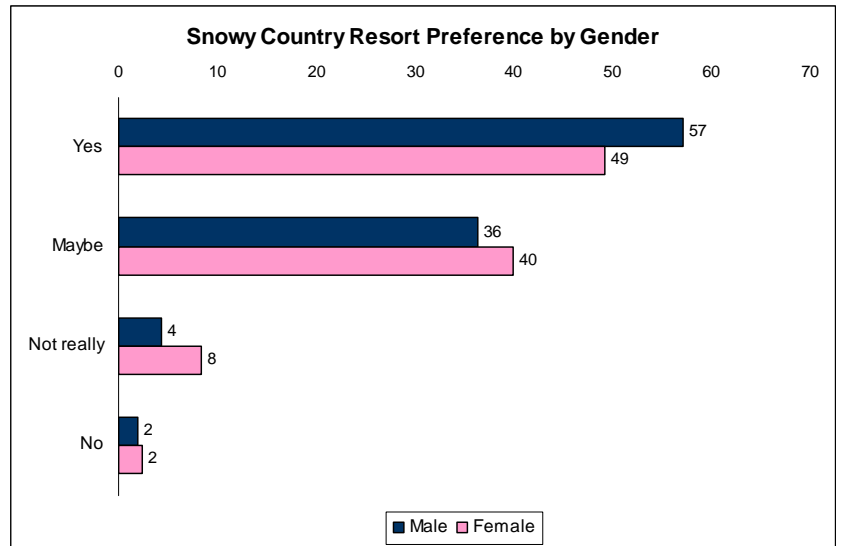
- Recent skiers/snowboarders were more likely to cite difficulties in taking long vacations, cost and sufficient domestic ski areas whereas those who had not skied or snowboarded recently were more likely to cite lack of confidence in their skills and being in poor shape as barriers to their travelling abroad for skiing/snowboarding.
- Infrequent overseas travellers were more likely to cite cost, lack of confidence in the language, difficulties in taking long vacations and having small children as barriers.
- Respondents with beginner skill levels were more likely to cite lack of confidence in their skills and being in poor shape whereas those with intermediate-advanced skill levels were more likely to state difficulties in taking long vacations as barriers to their travelling abroad for skiing/snowboarding.



4.18 Potential and Barrier of Skiing/Snowboarding Trip (ctd.)

Would you like to go to a snowy country resort whether it be domestic or foreign?

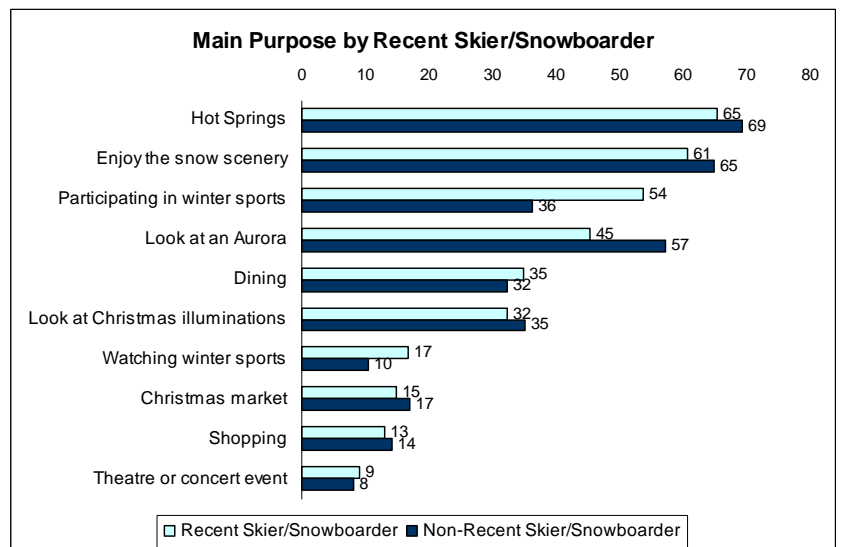
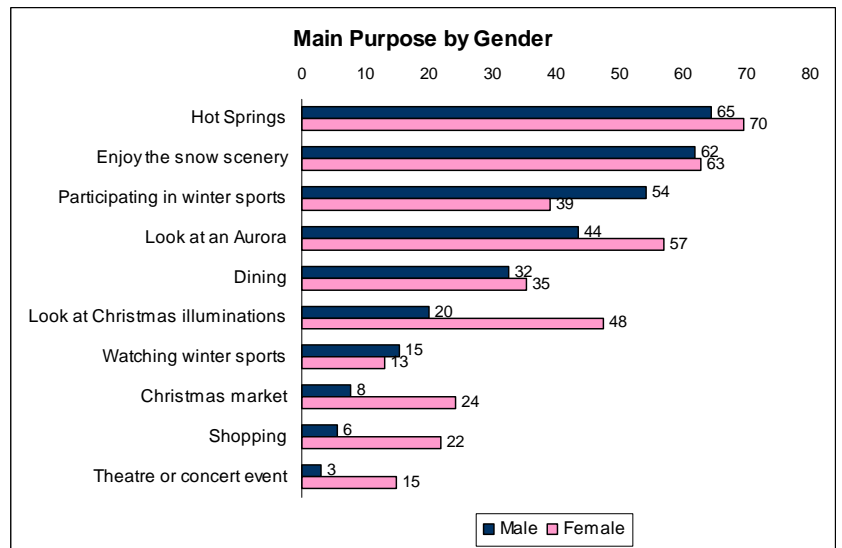
- Respondents were asked about their interest in visiting a domestic or foreign snowy country resort. Responses differed substantially by gender, recency of skiing/snowboarding, and skill level but not by prior visitation to Canada, age or frequency of overseas travel.
- Male respondents expressed a higher desire to go to a snowy country resort than did female respondents.
- Recent skiers/snowboarders had a higher level of interest in visiting a snowy country resort than did those who had not skied or snowboarded recently.
- Respondents with intermediate-advanced skill levels expressed greater interest in visiting a snowy country resort than did those with beginner skill levels.



4.18 Potential and Barrier of Skiing/Snowboarding Trip (ctd.)

What would be your main purpose?

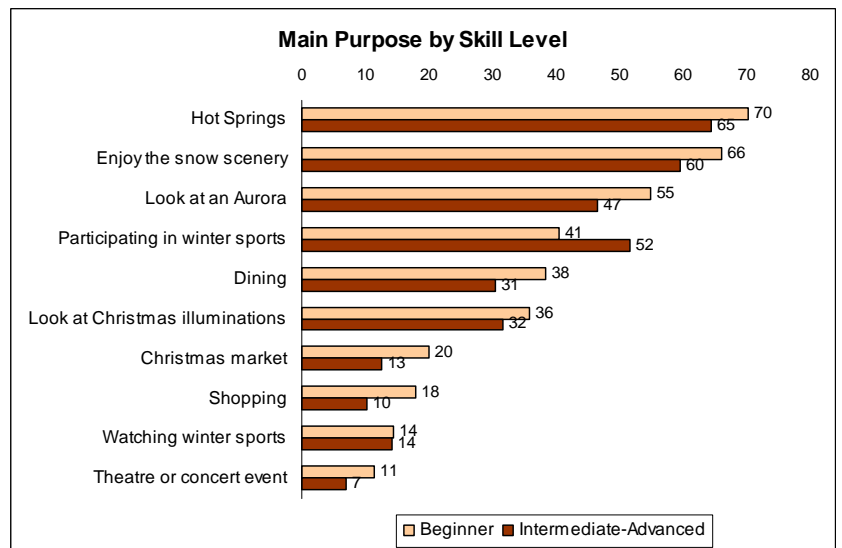
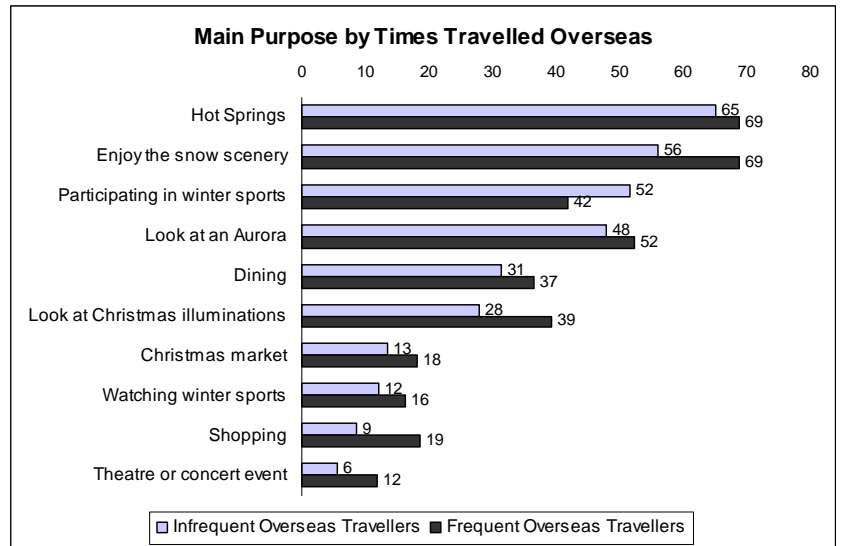
- Respondents who indicated 'yes' or 'maybe' to visit a domestic or foreign snowy country resort were asked about the main purpose for their trip. Responses differed substantially by prior visitation to Canada, gender, recency of skiing/snowboarding, frequency of overseas travel and skill level but not by age.
- In general, frequent responses included hot springs, enjoying the snow scenery, looking at an aurora and participating in winter sports.
- Visitors who had been to Canada were more likely to cite looking at an aurora, attending a theatre/concert event, enjoying the snow scenery, visiting a Christmas market and shopping as the main purpose for their visit to a snowy country resort.
- Female respondents were more likely to mention viewing Christmas illuminations, visiting a Christmas market, shopping, looking at an aurora, attending a theatre/concert event or enjoying hot springs whereas male respondents were more likely to mention participating in winter sports as the main purpose for visiting a snowy country resort.
- Recent skiers/snowboarders were more likely to mention the ability to participate in and/or watch winter sports whereas non-recent skiers/snowboarders were more likely to mention looking at an aurora as the main purpose for their visit to a snowy country resort.



4.18 Potential and Barrier of Skiing/Snowboarding Trip (ctd.)

What would be your main purpose? (continued)

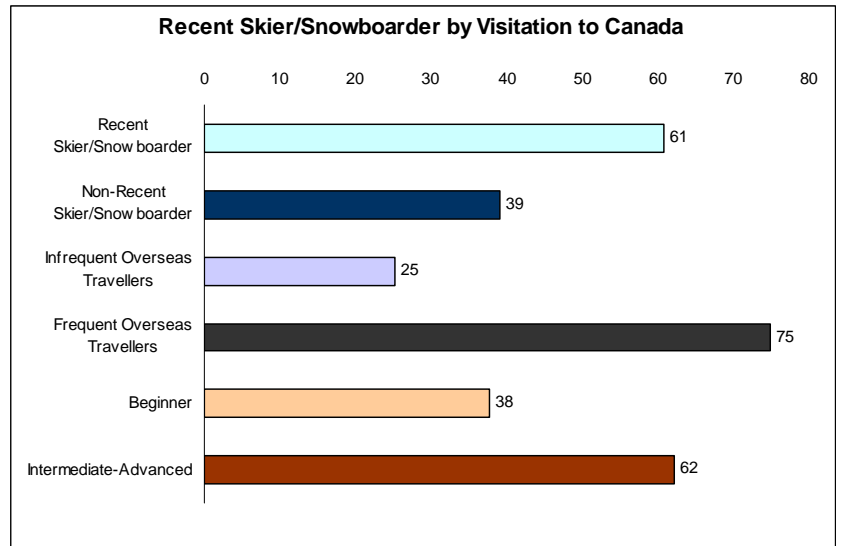
- Infrequent overseas travellers were more likely to cite participating in Winter sports whereas those who travelled overseas frequently were more likely to mention enjoying the snow scenery, viewing Christmas illuminations, shopping, attending a theatre/concert event, dining or visiting a Christmas market as the main purpose.
- Respondents with beginner skill levels were more likely to cite shopping, looking at an aurora, visiting a Christmas market, dining, enjoying the snow scenery and hot springs whereas those with intermediate-advanced skill levels were more likely to mention participating in winter sports as the main purpose for their visit to a snowy country resort.



4.19 Profile of Trips to Canada

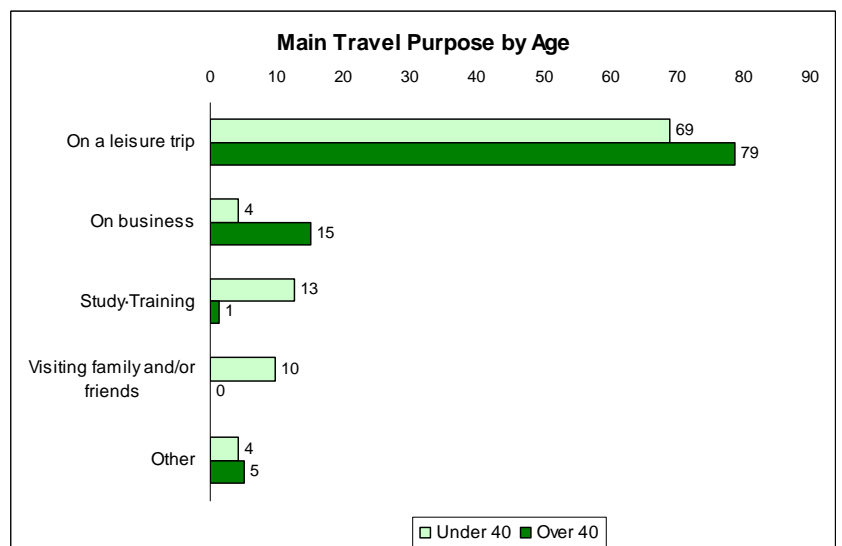
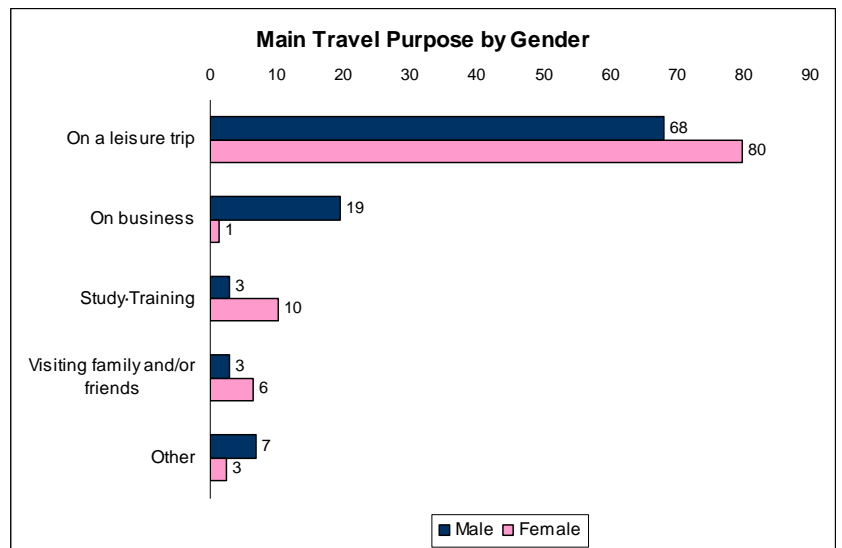
Have you ever been to Canada?

- Respondents were asked if they had ever visited Canada. Responses differed substantially by recency of skiing/snowboarding, frequency of overseas travel and skill level but not by gender or age.
- By comparison, frequent overseas travelers, those with intermediate-advanced skill levels and recent skiers/snowboarders were more likely to have previously visited Canada than did their respective comparing segment.



Your main purpose for the travel:

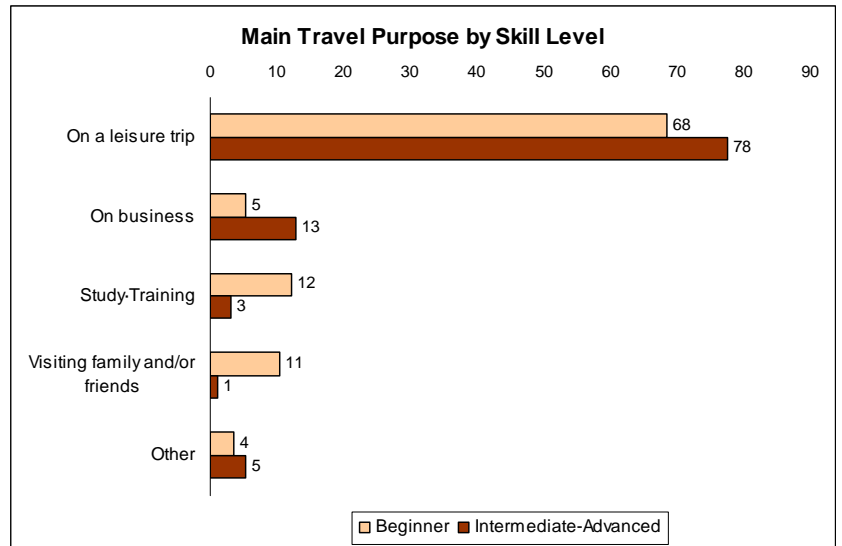
- Respondents were asked about the main purpose for travelling to Canada. Responses differed substantially by gender, age and skill level but not by prior visitation to Canada, recency of skiing/snowboarding or frequency of overseas travel.
- Overall, almost three quarters of all respondents were travelling for leisure. Fewer were visiting for business, study/training, or visiting family and friends.
- Female respondents were more likely to have visited Canada for leisure or study/training purposes whereas male respondents were more likely to have visited Canada for business purposes.
- Younger respondents were more likely to have been to Canada for study/training purposes or visiting family and friends whereas older respondents were more likely to have visited Canada for business or leisure.



4.19 Profile of Trips to Canada (continued)

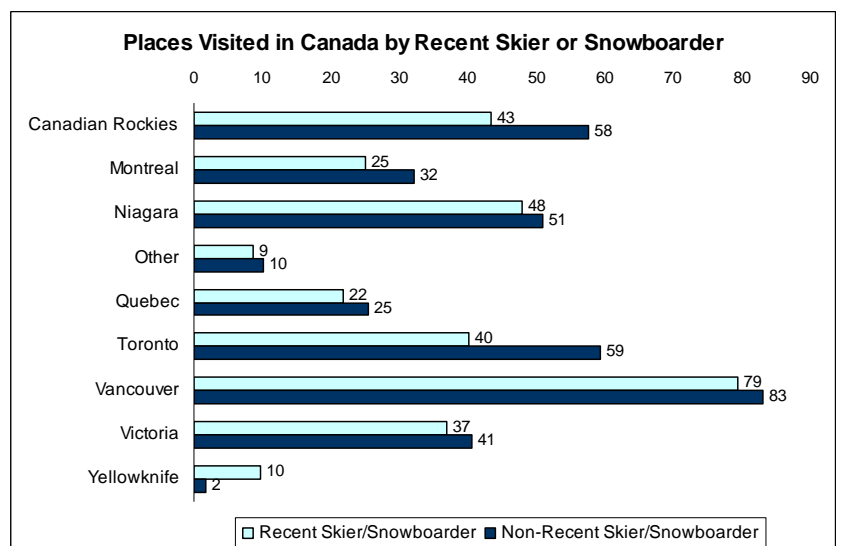
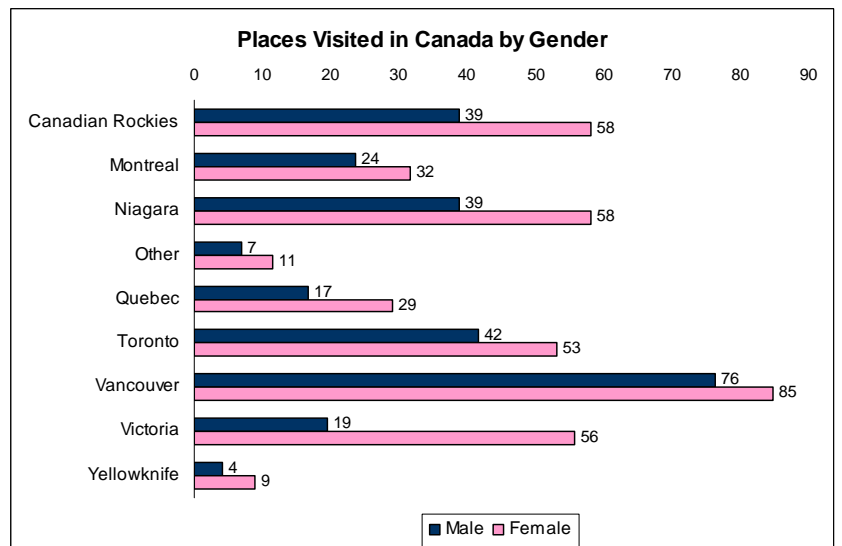
Your main purpose for the travel: (continued)

- Respondents with beginner skill levels were more likely to have been to Canada to visit family and friends or for study/training purposes whereas those with intermediate-advanced skill levels were more likely to have visited Canada for leisure or business.



Places in Canada that you have been to:

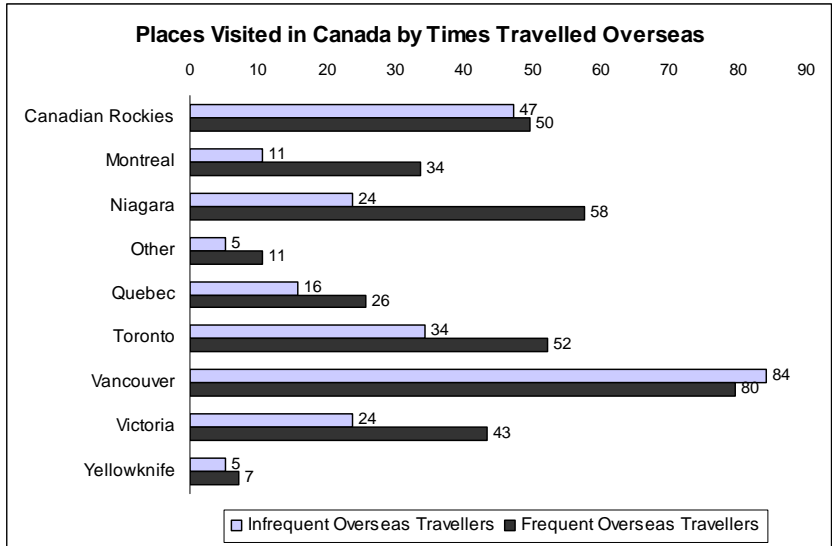
- Respondents were asked about places they had visited in Canada. Responses differed substantially by gender, recency of skiing/snowboarding and frequency of overseas travel but not by prior visitation to Canada, age or skill level.
- Vancouver was the most frequently visited destination by all respondents.
- During their travel to Canada, female respondents were much more likely to have visited Victoria, the Canadian Rockies and Niagara Falls than were male respondents.
- Non recent skiers/snowboarders who had travelled to Canada were much more likely to have visited Toronto and the Canadian Rockies than were recent skiers/snowboarders.



4.19 Profile of Trips to Canada (continued)

Places that you have gone to:
(continued)

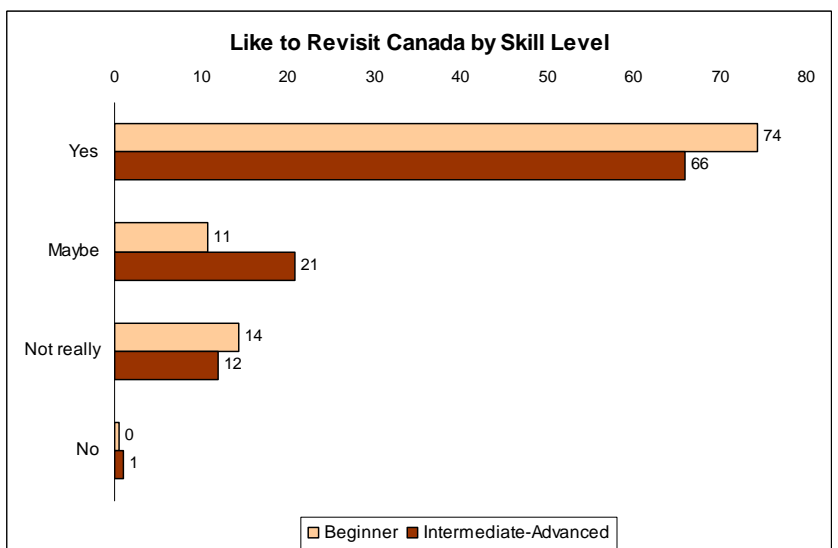
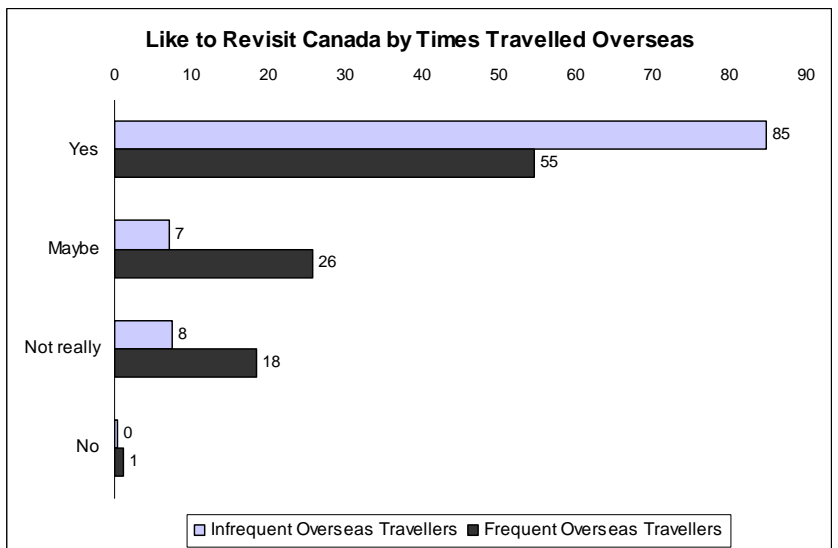
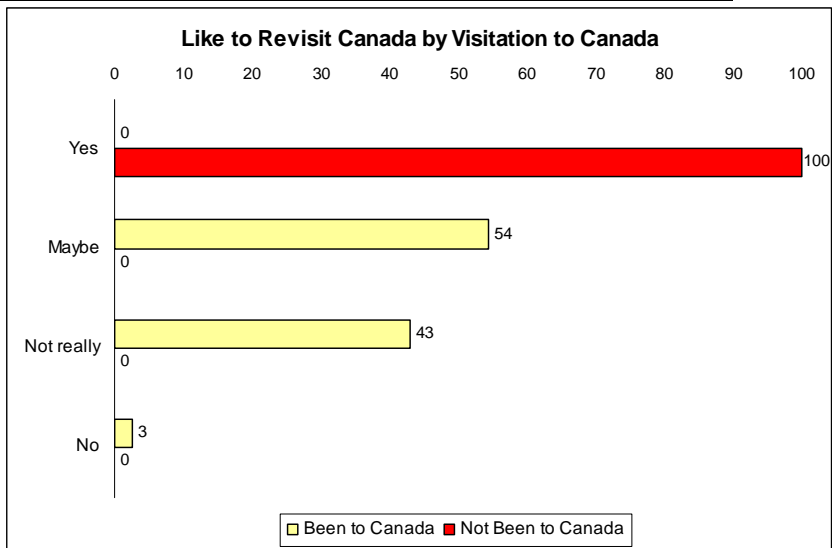
- Frequent overseas travellers who had visited Canada were more likely to have visited Niagara Falls, Montreal, Victoria, Toronto and Quebec than were infrequent overseas travellers who had previously visited Canada.



4.20 Potential for Canada

Would you like to visit Canada again in the next two years?

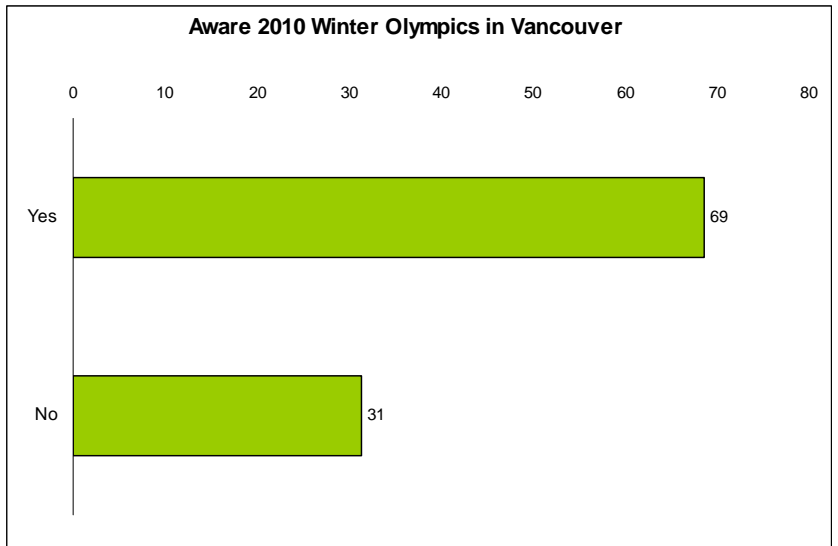
- Respondents were asked about their interest in visiting or revisiting Canada in the next two years. Responses differed substantially by prior visitation to Canada, frequency of overseas travel and skill level but not by gender, age or recency of skiing/snowboarding.
- All respondents who had not been to Canada before expressed a desire to visit in the next two years. Over half of all prior visitors to Canada also expressed some interest in revisiting the country.
- Infrequent overseas travellers expressed a higher desire to visit/revisit Canada in the next two years than did those who travelled more frequently.
- Respondents with beginner skill levels expressed higher levels of interest in visiting/revisiting Canada in the next two years than did those with intermediate-advanced ski levels.



4.20 Potential for Canada (continued)

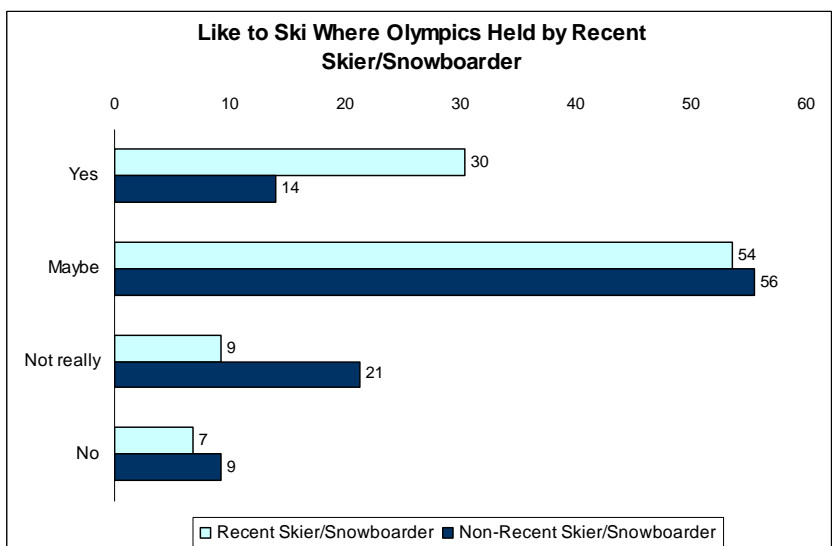
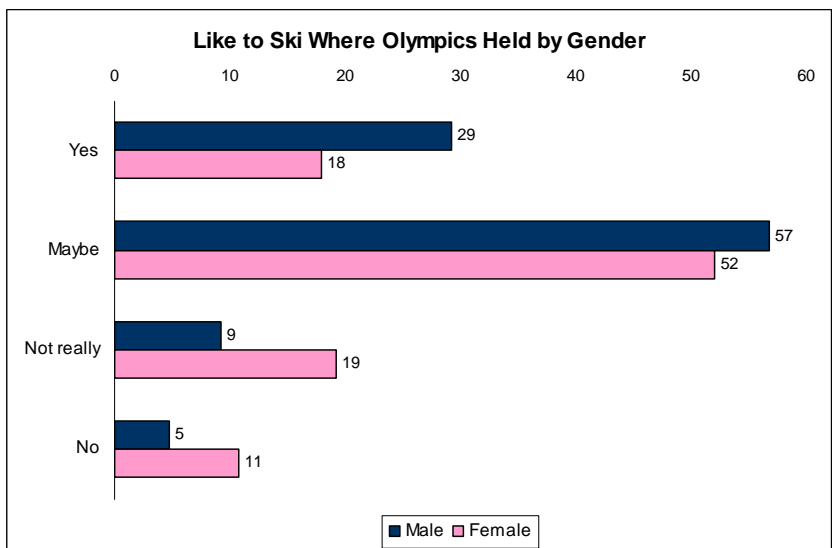
Did you know that the Winter Olympics for 2010 will be held in Vancouver, Canada?

- There were no significant differences in the various respondent segments used in this analysis.
- Overall, over two-thirds of all respondents were aware that the 2010 Winter Olympics were to be held in Vancouver, Canada.



Would you like to ski where the Olympics were/are going to be held?

- Respondents were asked whether they would like to ski at the site where the Olympics would be held. Responses differed substantially by gender, recency of skiing/snowboarding and skill level but not by prior visitation to Canada, age or frequency of overseas travel.
- Overall, a majority of respondents indicated interest ('yes' or 'maybe') in skiing at the site of the Olympics.
- Male respondents expressed a higher interest to ski at the site of the Olympics than did their female counterparts.
- Recent skiers/snowboarders expressed a higher interest to ski at the site of the Olympics than did those who had not skied or snowboarded recently.



4.20 Potential for Canada (continued)

Would you like to ski where the Olympics was/is going to be held? (continued)

- Respondents with intermediate-advanced skill levels expressed a higher interest to ski where the Olympics were held or going to be held than did those with beginner skill levels.

