



TOURISM  
ABBOTSFORD

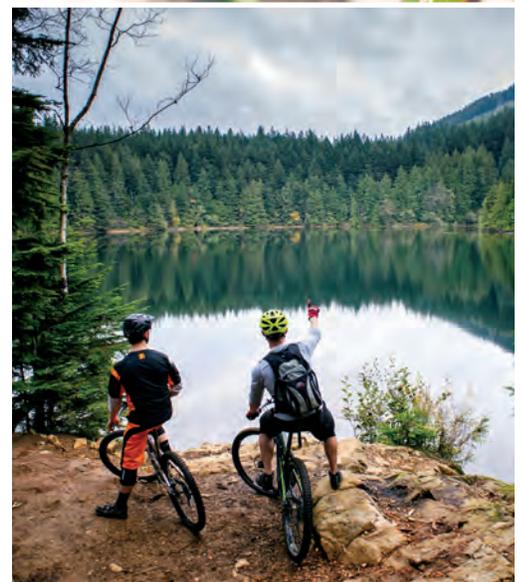
# 5 YEAR STRATEGY

TOURISM ABBOTSFORD  
FIVE YEAR TOURISM STRATEGY  
2018 – 2022

Prepared by Cadence Strategies

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# TOURISM ABBOTSFORD – FIVE YEAR TOURISM STRATEGY

## The Planning Process

The following five-year tourism strategy for Abbotsford is founded on an extensive engagement process with local tourism operators, arts and culture organizations, local government and First Nations in order to both secure the benefit of their knowledge and experience and to build support for Tourism Abbotsford and their leadership in plan implementation. In order to ensure a diversity of viewpoints and a variety of times/formats for participation, the following engagement strategies were employed:

- One on one interviews in person and via telephone throughout the entire planning process with key stakeholders representing a wide range of visitor experiences and host facilities (Tradex, Abbotsford Centre, Abbotsford International Airport)
- Workshops were held with invitations distributed to Tourism Abbotsford's database of tourism stakeholders on June 28th and August 24th, 2016
- Board of Directors workshops were held on June 28th, August 24th and October 13th
- Tourism Abbotsford staff team input session held on August 24th, 2016
- City of Abbotsford senior staff input session on July 12th, 2016
- Presentations at Business Innovation, Growth and Attraction Committee meetings

In addition to the wealth of ideas and knowledge offered by participants in these sessions, the consulting team spent many days 'on the ground' experiencing Abbotsford from a visitor's perspective. The recommendations made are additionally informed by a review better practices in several other destinations including Kitchener/Waterloo, Bellingham WA, Kamloops and Nanaimo. The definition of Abbotsford's highest return target markets benefited from the market research made available by Destination BC and interviews with marketing partners such as Tourism Chilliwack and Tourism Langley. Abbotsford's experiential offerings and market positioning were also compared to neighbouring destinations of Chilliwack, Langley and Surrey to understand commonalities and differentiators.

## Agri-Tourism Overview

Abbotsford is well known for its agri-tourism experiences. Over the course of engagement with Abbotsford's tourism stakeholders to secure their input to the five-year tourism strategy, agri-tourism was repeatedly identified as a 'leading' experience that was a marketing and destination management priority moving forward.

However, a review of potentially competing experiences along-

side stakeholder input identified that there was a significant opportunity to enhance the current agri-tourism experience in the following ways:

- Incorporate experience extensions on a field-to-table culinary theme that would also appeal to Millennials and Boomer couples without children – the current suite of experiences is very family-oriented and does not yet offer sufficient depth and density to motivate multi-night travel
- Support the growth of festivals and events along the agri-tourism/culinary theme to motivate travel and overnight stays – existing events such as the Tulip Festival can be enhanced so that they encourage attendees to move to multiple venues throughout Abbotsford for a range of themed experiences over the course of several days (thereby supporting overnight stays)
- Continue to work with the Fraser Valley Group to promote a broader range of agri-tourism experiences and ensure that sample itineraries, promotional packages and a call-to-action are included and easily navigated by the traveller to foster and monitor the overnight stays that are generated.
- Build new partnerships to promote agri-tourism in Abbotsford e.g. Ale Trail inclusion of Abbotsford's craft breweries

The five-year tourism strategy also identified that the current Visitor Centre building may be more effectively utilized as a showcase for Abbotsford products and experiences including its many agri-tourism experiences. Further detailed research and investigation is required to conceptualize this and understand the feasibility of so doing.

Agri-tourism will benefit from the recommended five-year strategies in the plan that are common to all sectors, as well as from specific promotional opportunities.

## Plan Structure

The resulting five-year tourism strategy for Abbotsford is structured as follows:

- Tourism Mandate
- The Tourism Opportunity – Market Research
- Current Situation Analysis and Review of Neighbouring Destinations
- Strengths/Weaknesses/Opportunities/Threats for Tourism in Abbotsford
- Abbotsford's Unique Selling Proposition and Target Markets
- Transferable Lessons and Case Studies
- Recommended Strategies
- Resource Allocation Priorities

# TOURISM MANDATE

During the stakeholder interview process and various workshops with the Board of Directors and with stakeholders, participants identified and agreed that the current mandate for Tourism Abbotsford remained relevant and should continue to provide strategic direction for the next five years. However, in order to recognition the changing dynamic of destination marketing and its migration towards destination management, it was important to reflect upon Tourism Abbotsford's role in supporting the delivery of remarkable experiences by tourism operators and in contributing to discussions related to municipal infrastructure, zoning, land use etc. that have the potential

to impact (enhance or detract) the visitor experience. In recent years, the concept of destination marketing by a lead community organization has been replaced by the concept of a destination management organization. While the acronym (DMO) remains the same, the latter embraces a more holistic view of the destination and the DMO is a participant (though perhaps not the lead) in strategic issues associated with any and all aspects of the visitor experience as they move through the 'path to purchase', receive destination content, visit and experience the destination, share their experiences and develop loyalty leading to return visitation.

**The following modified mandate is suggested for consideration by the Board of Directors:**

“

The mandate of Tourism Abbotsford is to develop and implement effective destination marketing strategies that will generate increased visitation, extended stays and generate additional revenue opportunities for businesses in our community.

Tourism Abbotsford will further grow these revenue opportunities for Abbotsford businesses through the effective management and operation of the Fraser Valley Trade & and Exhibition Centre (Tradex). By hosting events that bring visitors to Abbotsford and by using Tradex as a platform to showcase and provide information about all Abbotsford experiences, event attendees will be motivated to stay longer and return often.

Tourism Abbotsford will also support the delivery of remarkable visitor experiences in our community and will participate in destination development discussions to ensure our visitors enthusiastically join us as effective marketers for Abbotsford.

”

# THE TOURISM OPPORTUNITY – MARKET RESEARCH

A wide range of market intelligence available through Destination BC was reviewed to inform the development of a five-year tourism strategy for Abbotsford including:

- Tourism Indicators – October 2016 (with data to end of August 2016)
- Value of Tourism in British Columbia 2014 - February 2016
- Vancouver Coast & Mountains Regional Profile – January 2015
- Market Profiles (2012/2013) – October 2014
- Activity Sector Profiles

Copies of these research reports are available on [www.destinationbc.ca/Research.aspx](http://www.destinationbc.ca/Research.aspx). Highlights from this market research have been included as Appendix A.

## Market Research Implications

### Sector/Market Implications

Abbotsford is arguably best known for its agricultural land and agri-tourism experiences set against a scenic mountain backdrop and for the annual airshow. However, as noted in the Current Situation Analysis and listed in the inventory of tourism experiences, there is also a wide-range of hiking/biking trails, arts, culture and heritage offerings, shopping and retail experiences and a growing mix of culinary/craft brew/winery experiences. Additionally there are a number of festivals and events beyond the Air Show that currently draw visitors. However, there does not appear sufficient density and quality of experiences in any of these areas of interest to motivate long-haul travellers to choose Abbotsford as a multi-night destination. Consequently much of the current visitation is short-haul and regional in nature and will remain so in the immediate future.

This wide-range of visitor experiences, while establishing a foundation for future growth, also creates a challenge for Abbotsford as it would appear that the 'Abbotsford experience' is unclear in the minds of target travellers. This has been exacerbated by a degree of brand confusion related to Abbotsford and how it has historically positioned itself in the marketplace as the 'City in the Country'.

In order to become a multi-night destination, Abbotsford must precisely define and target its markets and speak to them with clear and compelling messaging (narrative and imagery). Messaging that Abbotsford 'has it all' or 'has something to do year round' will not sufficiently amplify above the noise of the competition. By the same token, focusing exclusively on one core travel motivating activity such as agri-tourism limits a vast market opportunity for a wide range of travellers having different travel motivations.

Therefore, the execution of all recommended marketing strategies must consider each market being targeted with specific information for them. This tactical execution can still occur under an 'umbrella' brand for Abbotsford that captures the unique 'essence' of

the place and experience. As noted by Phil Reddy:

*"... a destination brand... should capture and summarize all of the experiences within the destination and present these to the market in a way that influences perceptions and expectations, and persuades people that they are worth trying. A successful brand gives hope and voice to ambition, improves perceptions and, promises what can be delivered."*

A further implication of this research and the need to speak to various markets in very specific and distinct ways, is that marketing efforts should be weighted towards lower cost web/social media/technology based approaches rather than more traditional print collateral and advertising to permit cost-effective customization.

This is supported by research conducted by Destination Marketing Association International (DMAI) in their study 'Destination Next', 2014 where significant trends in destination marketing were identified.<sup>2</sup> Extracts from the top 20 trends in destination marketing that are relevant to Abbotsford are:

- Social media prominence in reaching the travel market
- Mobile platforms and apps becoming the primary engagement platform for travellers
- Customers increasingly seeking a personalized travel experience
- Smart technology creating new opportunities for innovative new services and processes
- Travellers demanding more information, control, interaction and personalization
- Geo-targeting and localization becoming more prevalent
- Customers increasingly looking for a travel experience that allows them to experience a locals way of life
- Technology enabling faster decision-making by customers, thereby increasing business to a destination
- Consumers becoming increasingly comfortable with ordering products online
- The brand of a destination becoming a more important factor in travel decisions to consumers
- Short-stay trips and mini vacations becoming increasingly popular
- More third-party information providers aggregating content about destinations
- Peer-to-peer buyer influence driving customer purchases
- Customers increasingly going direct to suppliers for goods and services

1 Culture Northwest 2006, Phil Reddy, Tourism Development Manager, Northwest Development Agency

2 Destination Next, A Strategic Road Map for the Next Generation of Global Destination Marketing – Phase I, Destination Marketing International Association, 2014

**From the perspective of target markets for Abbotsford, the implications of this market research for the tourism strategy are as follows:**

- BC Residents are an attractive target market for Abbotsford – their younger demographic will appreciate the mix of outdoor experiences, retail shopping and the growing brewery/winery/ culinary scene. However it is likely that some additional product/ experience development will be required (i.e. recreation opportunities on Sumas Mountain) before day trips can be converted to overnight or multi-night stays
- The Lower Mainland in particular due to its density of population and proximity to Abbotsford offer potential for short stays by families, Millennials but again the mix of experiences must be sufficiently compelling to overcome the perception of distance
- The segment of the BC resident market that consider themselves Authentic Experiencers (16%) or Cultural Explorers (10%) appear to be a fit for Abbotsford's arts/culture/heritage experiences. With sufficient luxury and branded product, Abbotsford could eventually evolve to attract Free Spirits (17%)
- Alberta travellers to BC are also somewhat younger (39% are aged 18-34 years) and anecdotally are travelling through Abbotsford on their way to/from Vancouver Island
- Ontario travellers span all age groups and given the air access to Abbotsford represent a possible target market
- Ontario travellers are Authentic Experiencers (17%) and Cultural Explorers (11%)
- Visitors from Washington State are older (45% are 55 years or older), Gentle Explorers (34%) ; Authentic Experiencers (18%) and Cultural Explorers (10%) – many are already travelling to the Vancouver Coast & Mountains region and given the favorable exchange rate should be considered a potential target market
- California travellers are older (42% aged 55+ years) and anecdotally it has been noted that they are coming through Abbotsford as part of a longer itinerary offering an opportunity to speak to this market with compelling overnight stays and experiences
- Touring travellers who pick up their RV rental in Abbotsford may be considered a potential target market however as noted in the current situation analysis, there are no attractive overnight RV campsites so impacts will benefit shopping, dining, attractions
- Authentic Aboriginal cultural experiences in and near Abbotsford once developed and market-ready will be of significant interest to many of these touring travellers and can be promoted as a key 'lure' in partnership with First Nations
- Fishing tourists are also a possible target market for Abbotsford although much of this market may already be travelling to Chilliwack
- Travellers motivated by mountain biking and road cycling represent a potential target market for Abbotsford particularly when experiences are combined along a circle route that encompasses the entire Fraser Valley
- Regional, provincial, and some national and international sport events will find the facilities, services and amenities they need in Abbotsford to host a successful event
- Meetings and events capacity in Abbotsford is limited but sufficient to target regional scale meetings and Abbotsford profile in the aviation industry supports securing this business in particular



# ABBOTSFORD – CURRENT SITUATION ANALYSIS

In order to develop strategies to achieve the objective of growing overnight visitation, length of stay and visitor spending on a year round basis, an assessment of the current situation of Abbotsford from a tourism perspective is required. The following analysis first considers Abbotsford location within First Nations' traditional territories. Access and infrastructure for visitors is considered next along with existing visitor experiences, current marketing and promotional efforts and the manner in which Abbotsford is currently organized and funded to pursue tourism opportunities.

## First Nations Traditional Territory

Abbotsford lies within the traditional territory of the Matsqui First Nation and the Sumas First Nation. These two nations are part of the Sto:lo Nation. The Sto:lo Nation covers territory from Yale in the Fraser Canyon to Fort Langley. In Halq'emeylem, the language of the Sto:lo, "Sto:lo" translates as "river". The Sto:lo people are called the "people of the river"

The Sto:lo people have lived in the Fraser Valley for at least 9,000 years. Traditional oral stories of the Sto:lo people tell of a time prior to 10,000 years ago. Archaeological evidence at Hatzic Rock (or Xa:ytem) in Mission, carbon dates artifacts at that site to be 9,000 years old.

The Sumas First Nation is currently considering several tourism related opportunities.<sup>3</sup> However their priority as a community is reconciliation and having a presence on their own landscape. They are interested in building awareness of their culture throughout the territory. Reconciliation will manifest first through a land use plan that will identify reconciliation zones such as Sumas Lake and Sumas Mountain.

There have been recent discussions with a high-end wedding venue/spa that is considering relocating to reserve lands (off the Agricultural Land Reserve which limits the nature and scale of permitted activities).

The Kilgard brick plant is located on reserve and while it is now closed, it operated for 100 years using a rare clay found on Sumas Mountain that was ideally suited for brick making. Bricks from this plant can still be found in locally in Clayburn Village as well as in historic sites like Vancouver's Gastown. Eventually the Sumas First Nation may create a visitor attraction around this historic site.

While much of this planned tourism development by the Sumas First Nation is many years in the future, Tourism Abbotsford can still play a role offering advice regarding the nature of experiences that visitors are seeking and as a conduit for various tourism-related programs that may be beneficial. One such program is the recently announced improvements and additions to the Provincial 'Stops of Interest' by the Ministry of Transportation. The desire of the Sumas

First Nation to have a greater presence on their traditional lands could be facilitated using this initiative. More information on the 'Stops of Interest' announcement and idea submission process can be found at:

<http://engage.gov.bc.ca/stopsinterest/>

<http://engage.gov.bc.ca/stopsinterest/map/>

The Matsqui First Nation is not yet engaged in a specific review of tourism opportunities but continued relationship building will remain an important strategy for Tourism Abbotsford over the next five years.

## Access and Infrastructure

### Road Access to Abbotsford

Abbotsford is located along the TransCanada Highway (with 7 exits) and is one-hour from the City of Vancouver and only 10 minutes from the US Border (Sumas Crossing).

Despite the reasonable travel time from downtown Vancouver, anecdotally it was reported by many tourism stakeholders that Vancouver residents perceive Abbotsford to be 'far away'. This perception may be exacerbated by the Port Mann toll bridge.

Abbotsford's location along this major highway is a significant strength and opportunity – the highway is a major artery with 72,000 vehicles passing by on a daily basis.<sup>4</sup> While much of this traffic is likely commuter in nature, the sheer number of vehicles offers an opportunity to speak to those passing by about reasons to stop and stay in Abbotsford.

### Air Access to Abbotsford

The Abbotsford International Airport offers flights by Air Canada, West Jet, New Leaf and several regional carriers such as Island Express and Orca Airways. Passenger volume in 2013 was 478,341 travellers.<sup>5</sup>

Destinations accessible from Abbotsford International Airport include:

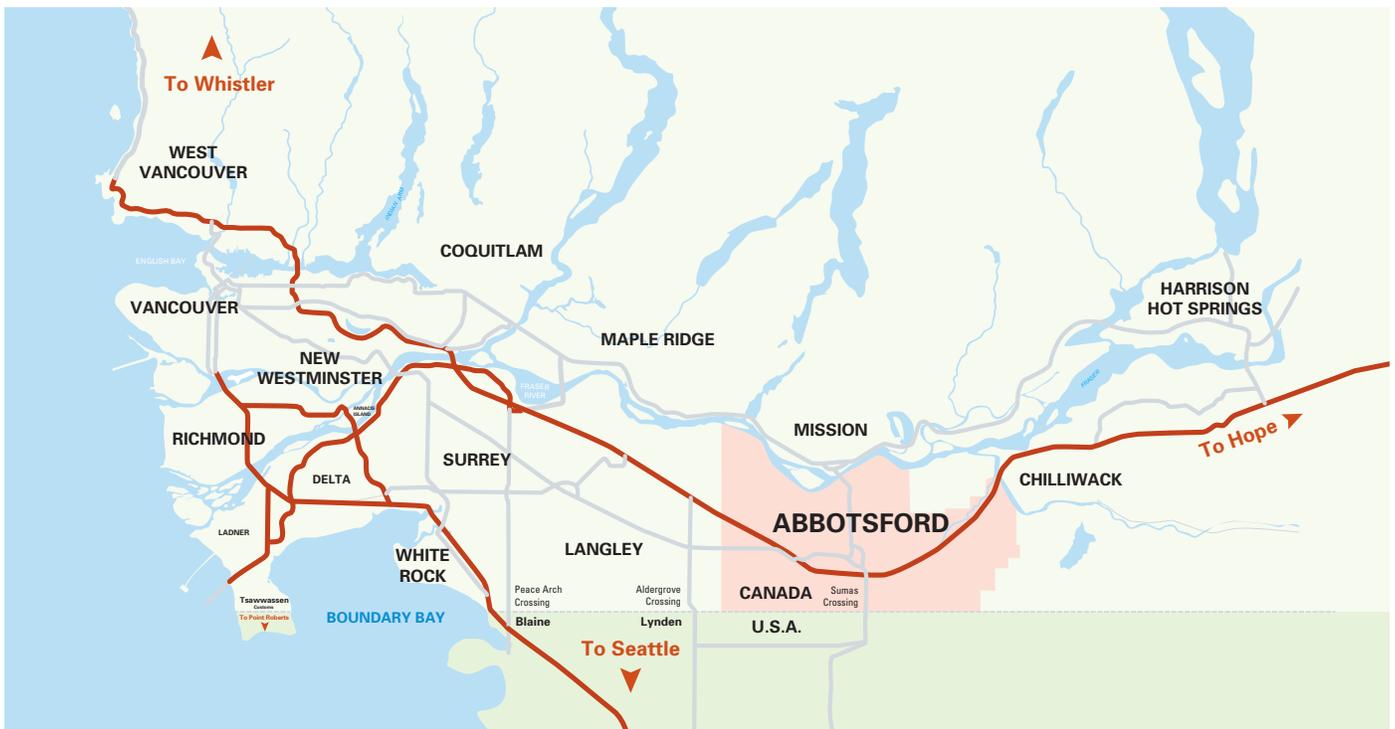
#### Non-Stop Flights

- Canada
  - Vancouver
  - Victoria
  - Nanaimo
  - Calgary, AB (YYC)
- Edmonton, AB (YEG)
- Toronto
- Mexico - Puerto Vallarta, Mexico (PVR) (seasonal)
- Las Vegas (seasonal)

<sup>3</sup> Interview with Stephen McGlenn, Sumas First Nation Lands and Resources

<sup>4</sup> Ministry of Transportation Traffic Data Statistics

<sup>5</sup> Destination BC Tourism Indicators



### Connecting Flights

Connecting flights are available to destinations throughout Canada and internationally. While these flights are generally comparable in price to corresponding flights using YVR, the ease of access and affordability of overnight hotel stays and long term parking make YXX an attractive alternative particularly for outbound local and regional passengers thus creating opportunity for 'stay and fly' packages.

### Bus Access to Abbotsford

BC Transit's Central Fraser Valley service offers transit to Abbotsford. The 66 FVX is a limited-stop express service designed to connect the municipalities in the Fraser Valley Regional District (FVRD) to Metro Vancouver and the TransLink transit system. The FVX serves six bus stops (two in Abbotsford) with 17 round trips on weekdays and four trips on Saturdays.

- Carvolth Exchange – Bay 13 (Langley)
- Highstreet Shopping Centre Park & Ride (Abbotsford)
- McCallum Park & Ride (Abbotsford)
- Lickman Park & Ride (Chilliwack)
- Vedder at Luckakuck (Chilliwack)
- Downtown Chilliwack (Bay B)

### Car Sharing to Abbotsford

It is more likely that those without personal vehicles in the Lower Mainland would utilize one of several car sharing services in Vancouver (Car2Go, MODO, ZipCar, Evo) rather than public transit.

These services all provide 200 km usage in their day rate which ranges from \$64/day to \$85/day. These rates include insurance and gasoline. In March, 2016 Global News reported on car sharing in Vancouver:

“Car sharing service Car2Go hit a major milestone on Monday after Vancouver became the first city in the world to have more than 100,000 members. Not only are they boasting that they have the most members but also have the largest fleet amongst the other car share companies in the region. Car2Go has about 1,250 Smart cars (and some Mercedes B-Class MPVs) in their fleet while Evo, MODO and Zipcar have 1,000 cars between them.

Car2Go, which is owned by Daimler North American Corporation, is definitely the largest car sharing company in the Lower Mainland, but its boundaries for the program are on the small side.”

~ [globalnews.ca/news/.../comparing-car-sharing-companies-in-the-lower-mainland/](http://globalnews.ca/news/.../comparing-car-sharing-companies-in-the-lower-mainland/)

### Visitor Infrastructure

Abbotsford offers a range of infrastructure to support visitor experiences including a variety of accommodation options, restaurants and retail shops. Outdoor experiences and activities are varied and include land-based hiking, mountain biking, road cycling, bird watching, as well as lake/river-based activities (fishing, stand-up paddle boarding). Abbotsford has 157 parks (2,584 acres of parkland) and 98 km of urban trails. Infrastructure to support sport tourism hosting is also available.

## Accommodation

Accommodation in Abbotsford includes the following hotels, motels, lodges and B&B's (a more detailed property description is included in Appendix A – Abbotsford Tourism Inventory):

- Adagio Guest House
- Clayburn Village Bed and Breakfast
- Country Charm Bed and Breakfast
- Bed and Breakfast at Anam Cara
- Edenvale Conference & Retreat Centre
- Coast Abbotsford
- Best Western PLUS Regency Inn & Conference Centre
- Sandman Hotel Abbotsford
- Abbotsford Super 8
- Travelodge
- Quality Hotel & Conference Centre
- Sandman Hotel Abbotsford Airport
- Sweet Dreams Luxury Inn
- Brookside Inn
- Alpine Inn
- Abbotsford Hotel
- Best Western Bakerview
- MCC Deer Trail Guest House

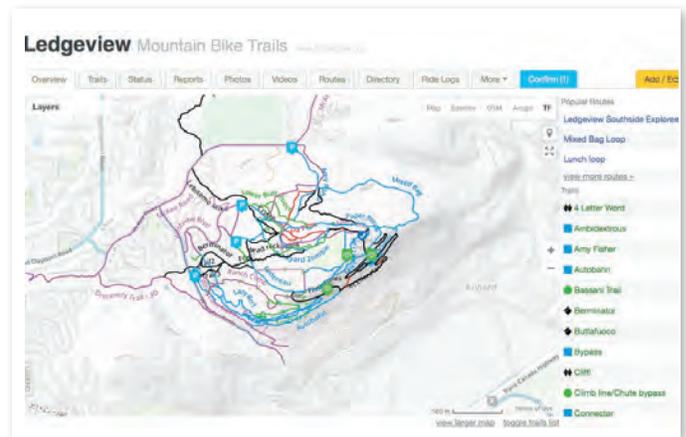
The inventory of available rooms in Abbotsford when the larger properties are combined is 832 rooms (i.e. excluding B&B's and smaller retreats/guest houses).

## Parks and Trails

Abbotsford offers 157 parks (2,584 acres of parkland) and 98 km of urban trails. Details are available in Appendix A. Several parks and trails are worthy of specific mention including:

- **Mill Lake Park** - A popular spot for walkers, joggers and fisherman. The 2.30 km trail winds around the lake. Wildlife viewing is also popular. The park also has playgrounds and a waterpark on location. Part of Discovery Trail.
- **Discovery Trail** - A paved corridor spanning through the community, connecting the East and West sides of Abbotsford. This extensive trail system is perfect for all season activity including walking, running, rollerblading and cycling. The trail system winds through natural habitat and includes areas with forest, ponds, creeks and lush meadows. Interpretive signage along portions of the trail, as well as well-marked lookout spots, make the trail a great place for observing, photographing and learning about the community's indigenous ecosystem.
- **Sumas Mountain Interregional Park** - A 1,471 hectare park jointly managed by the FVRD and Metro Vancouver. The FVRD manages 715 hectares of parkland on the eastern side of Abbotsford. Extensive trail network used for hiking, mountain biking.

A number of websites offer trail route suggestions for road cycling ([www.mapmyride.com](http://www.mapmyride.com)); mountain biking ([www.trailforks.com](http://www.trailforks.com)). Note that these websites are populated by the public at large and do not necessarily represent 'legal' trails.



## Campgrounds/RV Parks

Of note is the fact that Abbotsford does not currently offer visitors camping or RV facilities. This is a gap that affects Abbotsford's ability to secure overnight RV stays associated with longer-haul touring itineraries. Notably, Abbotsford is home to one of only two locations of Fraserway RV rentals – an RV rental company with over 1,000 vehicles in its fleet. With the addition of attractive RV camping it would be possible to target renters and encourage them to spend several nights in Abbotsford at the beginning or end of their journey.

## Restaurant/Retail and Visitor Services

Much like accommodation, visitors require a range of restaurant and retail options to support their experience and encourage longer lengths of stay. Abbotsford offers a variety of restaurants that include fine dining, family fare and fast food chains to meet every visitor taste and budget. Many of the boutique offerings feature locally sourced ingredients. A complete listing is provided on [www.tourismabbotsford.ca](http://www.tourismabbotsford.ca).

**Abbotsford is also home to several craft breweries and wineries as well as a meadery including:**

- Field House Brewing
- Old Abbey Ales
- Ravens Brewing Company
- Campbell's Gold Honey Farm & Meadery
- Maan Farms Estate Winery
- Mt. Lehman Winery
- Singletree Winery
- Ripples Winery
- Seaside Pearl Winery

## Retail Shops

Abbotsford offers a range of retail experiences that support visitor needs for both basics (fuel, groceries, pharmacy), and for

interesting local items. Some of the more unique retail offerings are found in historic downtown Abbotsford – see [www.downtownabbotsford.com](http://www.downtownabbotsford.com) for details. Complimentary shopping experiences are offered at Highstreet and Sevenoaks Mall. Sevenoaks Shopping Centre is centrally located with over 100 retail shops, services and food establishments. High Street is a 600,000 square foot open-air retail, dining and entertainment experience easily accessed from Highway #1 featuring award-winning streetscapes and architecture. Anchor tenants include Sephora, Walmart, Supercentre, London Drugs, H&M, Old Navy and Cineplex. Highstreet offers seasonal programming such as Halloween activities and Christmas events including lighting a 65 foot tall tree with over 6,000 ELD lights.

## Sport Tourism Infrastructure

Abbotsford has made a significant investment in sport infrastructure that allows it to compete for regional, provincial, national and international events including:

- Matsqui Recreation Centre (MRC) offers wave pool, swimming pool, skating, fitness, facility rentals, senior centre and community.
- Abbotsford Exhibition Park is a world class 75-acre park which boasts a wide variety of indoor and outdoor facilities, including ball diamonds, playing fields, a track & field stadium and BMX track.



- Rotary Stadium and Track offers a fenced 400 meter rubberized 8-lane track, a grass in-field, grand-stand seating for 4,000, a public address system, timing tower, a field-house (complete with meeting room), plus six changing rooms, referees room, and first aid room.
- MSA Arena - The MSA Arena is a 1,100 seat ice rink which also features 4 lit outdoor tennis courts and an outdoor lit asphalt basketball court.
- Twisters Gymnastics Club - Twisters Gym, located on the grounds of Abbotsford Exhibition Park, is a fully equipped gymnastics training centre. Currently Twisters is the home of the National Training Centre for Men's Gymnastics and is the only club in Canadian history to have sent a male and female gymnast to the same Olympic Games. In the past 20 years Twisters has grown to become a renowned training centre for Olympic-calibre gymnasts.
- Centre Ice - Abbotsford Centre Ice features twin NHL-size arenas and is an excellent place to hold multi-division tournaments.
- Abbotsford Curling Rink - The dedicated staff and volunteers are committed to providing outstanding experiences through bonspiels and championships.
- Abbotsford Recreation Centre - The facility provides an international size ice sheet, and has been the host to several major short track speed skating events. In addition to the world-class ice surface, the new adjoining community centre and outdoor grass fields provide world-class dry land training.
- Abbotsford Centre - The Abbotsford Entertainment Centre is the premiere entertainment and sports venue in the region. Family Shows, Hockey, Motorsports, Concerts, Ice shows are hosted
- Tradex – has been used for various sporting events including volleyball and indoor soccer.

## Conclusions/Implications – Access and Infrastructure

Abbotsford is easily accessed and offers visitors the necessary infrastructure to serve as a multi-night destination or a multi-night stop as part of a longer touring itinerary. There is an extensive network of parks and trails suitable to all ages and levels of expertise.

Abbotsford's accommodation, retail and restaurant services offer an excellent range and mix of options to achieve the tourism objective of growing overnight visitation, length of stay and visitor spending on a year round basis. Included in this mix is a growing number of unique retail and culinary experiences including craft breweries, wineries and award-winning restaurants.

Anecdotally, some tourism stakeholders commented that Abbotsford would benefit from a higher end accommodation option and that the level of front-line service quality in many businesses is inconsistent.

Abbotsford's sport tourism infrastructure is significant and has the

capacity to host a wide-range of regional, provincial, national and international tournaments.

Given the adequacy of visitor access and the visitor infrastructure already in place, the focus of this five-year tourism strategy is more appropriately on the identification of opportunities for Abbotsford to undertake the following:

- Showcase its competitive advantage where it is strong enough to stand alone,
- Form partnerships with complimentary destinations such as the Fraser Valley group where a united approach to market is more compelling and
- Continue to build collaborative relationships and work together under the leadership of Tourism Abbotsford to achieve the tourism mandate and tourism objectives noted above.



# Existing Visitor Experiences

While all experiences listed in the inventory contribute to the overall visitor experience, the table below features key visitor experiences that have the potential to motivate travel to Abbotsford:

Activity	Visitor Experience	Activity	Visitor Experience				
<b>Arts, Culture and Heritage</b>	<ul style="list-style-type: none"> <li>Abbotsford Sikh Museum – National Heritage Site</li> <li>Clayburn Village</li> <li>Trethewey House Heritage Site</li> <li>Mennonite Heritage Museum</li> <li>The Reach Gallery</li> <li>Gallery 7 performances</li> <li>Abbotsford Arts Centre performances</li> <li>Fraser Valley Concert Society</li> </ul>	<b>Culinary</b>	<ul style="list-style-type: none"> <li>Old Abbey Ales</li> <li>Field House Brewing</li> <li>Ravens Brewery</li> <li>Mt. Lehman Winery</li> <li>Singletree Winery</li> <li>Campbell’s Gold Meadery</li> <li>Maan Farms Winery</li> <li>Tanglebank Gardens &amp; Brambles Bistro</li> <li>Restaurant 62</li> <li>Woodbridge Ponds &amp; Ripples Winery</li> </ul>				
	<b>Festivals and Events</b>		<ul style="list-style-type: none"> <li>Tulip Festival</li> <li>Abbotsford Air Show</li> <li>Agrifair</li> <li>HopFest</li> <li>Abbotsford Farm and Country Market</li> <li>Various TRADEX events/shows</li> <li>Various Abbotsford Centre events/shows</li> <li>Canada Day</li> <li>Run For Water</li> </ul>	<b>Parks &amp; Trails</b>	<ul style="list-style-type: none"> <li>Discovery Trail</li> <li>Sumas Mountain Trails</li> <li>Mill Lake Park</li> </ul>		
			<b>Agri-tourism</b>		<ul style="list-style-type: none"> <li>Maan Farms Market</li> <li>Birchwood Dairy</li> <li>Bakerview EcoDairy</li> <li>Neufeld Farms</li> <li>Campbell’s Gold Honey</li> <li>Tanglebank Gardens</li> <li>Onnik’s Blueberry Farm</li> <li>Applebarn at Taves Farm</li> <li>Goats’ Pride Dairy</li> <li>Lepp Farm Market</li> <li>Rockweld Farm</li> </ul>	<b>Retail/Shopping</b>	<ul style="list-style-type: none"> <li>Highstreet</li> <li>Downtown Abbotsford</li> <li>Farmers’ Market</li> <li>Clayburn Village</li> <li>Sevenoaks Shopping Centre</li> </ul>
					<p><b>Tourism stakeholders identified the following ‘gaps’ in visitor experiences in Abbotsford:</b></p> <ul style="list-style-type: none"> <li>More adult-oriented extensions of agri-tourism offerings (very family oriented currently) including greater density of culinary experiences and incorporation of more farm to table, hands-on learning opportunities</li> <li>Connection to Fraser River is missing from Abbotsford experiences</li> <li>Improved presence from Highway – while there are 7 exits, there is no sense of arrival in Abbotsford</li> <li>Additional high-end accommodation</li> <li>Quality and consistency of service levels could improve</li> </ul>		

## Conclusions/Implications of Existing Visitor Experiences

There is a wide range of experiences in Abbotsford that encompasses outdoor activities and arts/culture/heritage activities. Abbotsford has experiences that appeal to families and experiences that appeal to younger Millennials and touring Boomers. However, it would appear that Abbotsford struggles to have enough depth of experiences in any single theme to readily motivate overnight travel.

The number of agricultural and easily accessible trail experiences is well complemented by unique and authentic cultural and heritage offerings including a wide-range of talented artists, and local history/heritage. There are several festivals and events throughout the year that can serve as a catalyst to visitation. However, product extensions and new experiences would serve to create a more compelling offering. Over the next five years, it would appear that Abbotsford has the strength to go 'solo' in some experiential areas and in others would be best served by partnering with complimentary experiences that together make a compelling reason for travel.

- **Abbotsford – solo**

- Aviation related events/meetings
- Sport Tourism
- Select festivals, concerts, signature events

- **Abbotsford – in partnership**

- Mountain Biking – Fraser Valley
- Agri-tourism – Fraser Valley
- Wine/beer/culinary – various touring routes and 'ale trails'
- Golf – Fraser Valley
- Arts & Culture/History & Heritage – Fraser Valley



## Current Visitation to Abbotsford

Abbotsford Visitor Centre currently operates seven days per week in the summer from 9:00 a.m. to 5:00 p.m. daily, and Monday – Saturday throughout the winter.

**A summary of Visitor Centre statistics for the period from 2014 to 2015 is as follows:**

	2016 (YTD Oct)	2015	2014
Total Visitors at Visitor Centre	8,261	8,986	8,894
Total Visitors at Events	6,605	7,389	3,904

Source: Tourism Abbotsford

**Area of origin statistics for Abbotsford indicate the following:**

Area of Origin	2015	2016 YTD October	Percentage
Local Resident	5,191	5,574	50%
BC	3,779	3,486	31%
Alberta	209	354	3%
Other Canada	381	312	3%
Washington	199	220	2%
California	38	47	1%
Other US/Mexico	303	222	2%
Europe	421	320	3%
Asia/Australia	381	492	4%
Other	168	95	1%

Source: Destination BC

It is likely that many close-in regional visitors to Abbotsford do not utilize the services of the Visitor Centre as they are already familiar with the area, so these statistics are of limited value in terms of understanding total visitation, area of origin and motivating activity. The visitors that do stop in the Abbotsford Visitor Centre are primarily interested in maps and directions, attractions and tours, events/conferences and food/beverage information.

Length of stay reveals an interesting dichotomy – it would appear that those visitors who stop at the Visitor Centre are either staying for the day, or are in Abbotsford for 2-3 days for a specific event (sports tournament, TRADEX event, University). This confirms the significant opportunity to grow visitation through sport tourism and leveraging existing visitation driven by events at various facilities throughout Abbotsford.

The Visitor Centre data is still useful to indicate trends in visitation and can offer a readily accessible baseline measure from which to track progress towards the plan objectives until a more robust and comprehensive measure is developed and established.

Interestingly, while the largest source of visitation to the Abbotsford Visitor Centre (outside of local residents) is BC residents, long haul markets such as Other Canada, Europe and Asia/Pacific also visit. These visitors are likely touring the region and therefore the opportunity arises to speak with these visitors both in the trip planning stage of their experience and while they are en route and encourage them to stay in Abbotsford for longer periods. The 2016 YTD statistics indicate growth in the Asia/Pacific segment in particular.

# Existing Marketing and Promotion

## The Provincial Context – Destination BC

Destination BC is an industry-led Crown corporation that works collaboratively with tourism stakeholders across the province in coordinating marketing at the international, provincial, regional and local levels. Destination BC has been mandated to fulfill several key marketing and leadership responsibilities critical to the long-term, sustainable growth of provincial tourism.

Over the next three years, Destination BC will be focused on three important goals for growth, as identified within their new Corporate Strategy<sup>6</sup>:

- Secure the highest Net Promoter Score in North America
- Lead Canada in growth of overnight visitor expenditures
- Build a collaborative, insight-driven, results-focused team

In addition, the corporate strategy identifies five iconic experiences that showcase BC in a compelling way: Canadian Rockies, Rainforests, Cities in Wilderness, Ocean Coast and Skiing.

### A few key Destination BC initiatives that may impact Abbotsford include:

- Launch of BC's new tourism brand creative and guidelines. There is significant effort being placed on industry leveraging and amplifying the BC destination brand with the tagline Super, Natural British Columbia<sup>7</sup>
- Continuation of application-based provincial Co-operative Marketing Partnerships Program<sup>8</sup> (Open Pool) which has replaced the Tourism Partners, Community Tourism Opportunities and Experiences BC programs.
- Launch of EQ program for tourism operators.
- Continuation of Remarkable Experiences pilot program. The goals of the program are to support businesses over a period of time to: improve their digital and social media marketing skills; increase their Net Promoter Score<sup>9</sup>, and enhance the visitor experience of each individual business, but also the collective experience between businesses. The Fraser Valley Circle Farm Tour was selected as a 2017 pilot collection of experiences.
- Marketing Strategy with a focus on Captivate, Advocate and Generate<sup>10</sup>
  - Captivate: Create an emotional connection with BC in the minds of global consumers. This strategy will drive visitation by fostering an emotional connection between the target

audience and British Columbia through alignment around the BC destination brand, inspirational storytelling to passionate audiences and data-driven marketing

- Advocate: Amplify traveller advocacy about BC. This strategy will drive visitation by amplifying the power of peer to peer recommendations to influence potential travellers to visit BC thereby increasing reach and impact
- Generate: Lead generation for BC tourism businesses and travel trade. This strategy will increase referrals for tourism business in BC by leveraging the strength of global relationships and technological capabilities
- Destination and Industry Development strategies with focus on Mobilize, Empower and Transform<sup>11</sup>
  - Mobilize: Bring together and align collective efforts. This strategy will drive increased collaboration, coordination and alignment in marketing and destination development activities across the BC tourism industry. Mobilize speaks to the competitive advantage we can have by bringing together all key partners and industry towards a common vision, aligned goals and supported efforts.
  - Empower: Enable a stronger network. This strategy will ensure limited resources collectively have more impact and that industry has access to Destination BC's programs, tools, technology, funding, frameworks for strategic planning, and professional development expertise to support the creation of a powerful marketing and experience development network.
  - Transform: Enhance experiences and destinations to increase competitiveness. This strategy will drive the long-term success of BC's tourism industry over ten years and beyond through Destination Development Planning. As consumer preferences and interests change, BC needs to continue to evolve its offerings to remain fresh and innovative, offer quality and value for money against other destinations and meet the expectations of our priority and emerging markets. The delivery of remarkable experiences result in increased visitor spending, longer stays, repeat visits and recommendations through social networks.

Destination BC is also reviewing its approach to visitor services recognizing that pre-travel planning and purchases, as well as in-market itinerary choices, are now trending toward online resources and research. Usage of the Province's network of Visitor Centres has seen a decline with 740,000 fewer visitors in 2014 than in 2005. Destination BC has concluded that the traditional approach of welcoming travellers into bricks and mortar locations alone no longer has the broad economic impact that can be achieved by a strategy that also capitalizes on the many other information channels available to visitors today. Destination BC is encouraging communities to evolve their visitor information services to incorporate forward-thinking online, mobile and crowd-sourcing channels. Destination BC's funding for Visitor Centres will continue in the short-term however,

6 Our Corporate Strategy, Destination BC: <http://www.destinationbc.ca/cmspages/getfile.aspx?guid=55651809-3ab6-4f0e-ba36-9bffb8de7ef9>

7 New brand guidelines are available: <http://www.destinationbc.ca/getattachment/Resources/british-columbia-tourism-brand/Our-Brand.pdf.aspx>

8 New program guidelines are available: <http://www.destinationbc.ca/Programs/Regions-Communities-and-Sectors/Destination-BC-Co-op-Marketing-Program.aspx>

9 Background on the Net Promoter Score is available: <http://www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx>

10 New strategy is available <http://strategy.destinationbc.ca/our-marketing-strategy/>

11 From DBC's new 2017 – 2020 Destination and Industry Development strategy

this is seen as a transition period to allow local Visitor Centres to plan ahead. An Innovation Fund has been established to allow communities to expand the delivery of visitor services and to create more contemporary and innovative approaches to serve visitors' needs as they travel throughout BC.

In 2016, over \$300,000 was provided in support for projects across BC which tested mobile kiosks, roaming visitor counselors, state-of-the-art electronic touch screen kiosks and social media channels. In 2017, another \$300,000 is available through the application-based Visitor Services Innovation Fund (applications closed November 30, 2016). Abbotsford has received funding in the past for its mobile visitor servicing and application for continued support should be made for 2017.

## The Regional Context – Vancouver Coast & Mountains

Abbotsford is part of the Vancouver Coast & Mountains tourism region. While there is no longer a regional DMO in place, direct support remains available through resources at Destination BC.

## Sector Marketing Organizations

In BC, there are several sector based marketing organizations that can help to promote experiences in the Abbotsford area. Partnerships with these organizations are considered in the strategy section below:

- **Aboriginal Tourism Association of BC (AtBC)** – AtBC promotes Aboriginal tourism operators throughout the Province. See [www.aboriginalbc.com](http://www.aboriginalbc.com) for more information.

- **Mountain Biking Tourism Association:** The trails in Abbotsford are currently represented in the Mountain Bike Tourism Association (MBTA) as a participating mountain biking area known as the Fraser Valley [www.mountainbikingbc.ca](http://www.mountainbikingbc.ca). (Note: there is opportunity to showcase a greater number of Abbotsford businesses than are currently featured)

## Local Marketing and Promotion

In addition to the efforts of Tourism Abbotsford, local tourism businesses market themselves with signage, websites, brochures and word of mouth. Several accommodation properties are part of larger chains and benefit from corporate promotional efforts. The City of Abbotsford undertakes marketing efforts associated with Economic Development.

Abbotsford is promoted by Destination BC through the primary consumer website [www.hellobc.com](http://www.hellobc.com) and Abbotsford has its own community pages at [www.hellobc.com/abbotsford.aspx](http://www.hellobc.com/abbotsford.aspx). Overall visitation to Hellobc.com in 2015 was 8.4 million.<sup>12</sup>

## Conclusions/Implications of Existing Marketing and Promotion

Investments to date have set a foundation for additional target market penetration leveraging Abbotsford's core strengths and areas where it can motivate overnight visitation either as a destination itself or in partnership with neighbouring experiences.

<sup>12</sup> As reported by Destination BC



# STRENGTHS/WEAKNESSES/OPPORTUNITIES/THREATS FOR TOURISM IN ABBOTSFORD

The tourism strategies that follow are intended to leverage Abbotsford's tourism strengths and seize high return opportunities while being cognizant of the weaknesses and threats being faced.

Abbotsford's most significant strengths and opportunities lie in its scenic beauty, its location on the TransCanada and proximity to the Lower Mainland, its wealth of agri-tourism experiences, and growing winery/brewery/culinary scene alongside the opportunities associated with enhancing and extending these agri-tourism/culinary experiences. As well Abbotsford benefits from its strong presence in the aviation industry including its own International Airport, the well-known International Air Show and a growing aviation technology sector.

Further, Abbotsford has facilities such as TRADEX and the Abbotsford Centre that are already drawing significant numbers of visitors creating an opportunity to speak to this somewhat captive audience and share with them the reasons to stay longer and come back to Abbotsford.

## Strengths

CHARACTERISTICS OF ABBOTSFORD THAT GIVE IT ADVANTAGE OVER OTHERS

- Scenic, wide, fertile valley/mountain backdrop
- Friendly community – ethnically diverse
- Highly visible location along the TransCanada #1 – close to US border
- Number/mix of agri-tourism experiences (berries, dairies, apples, honey, poultry/meats, family friendly activities – maze, petting zoo, playgrounds, ziplines...)
- Growing number of wineries, craft breweries
- Unique festivals/events (Air Show, Tulip Festival, Run for Water etc.)
- Community embraces arts, culture, heritage – Gallery 7, Abbotsford Arts Centre, Abbotsford Arts Council, Reach Gallery & Museum, Trethewey House, Downtown, Clayburn Village, Sikh Museum, Mennonite Heritage Museum
- Discovery Trail, 98 km network of trails – cycling/mountain biking/walking, 157 community parks (2,584 acres of parkland), lakes
- Facilities in place that are already drawing visitation:
  - Abbotsford Centre
  - TRADEX
  - Abbotsford International Airport
  - Meetings/conference facilities
  - Sport tourism facilities

## Weaknesses

CHARACTERISTICS OF ABBOTSFORD THAT PLACE IT AT A DISADVANTAGE RELATIVE TO OTHERS

- Not quite enough...to warrant overnight stay
  - Not quite far enough away from Vancouver
  - Not quite enough culinary experiences...opportunity to extend
  - Not quite enough farm experiences...opportunity to continue to work with Fraser Valley
  - Not quite enough craft breweries/wineries...opportunity to work with a larger 'trail'
  - Not quite different enough from Langley, Chilliwack, Bellingham area....opportunity to work together
- Quality of service inconsistent/ambivalent
- Many TRADEX shows have grown to limits of facility
- Limited TRADEX meeting space capacity restricts new opportunities
- Abbotsford accommodation mix missing higher end
- Fraser River experiences/connection to the river seems to be missing

# Opportunities

ELEMENTS IN THE TOURISM ENVIRONMENT THAT ABBOTSFORD CAN EXPLOIT TO ITS ADVANTAGE

- Strength of US Dollar is encouraging more American visitation and keeping more Canadians at home
- Growing use of social media/mobile technology for information gathering by travellers both in the planning stage of their trip and while in destination
- Increasing opportunities and resources to support sport tourism/event hosting [www.gov.bc.ca/eventhosting](http://www.gov.bc.ca/eventhosting)
- Leverage growing desire for culinary experiences, access to locally grown ingredients, food education and closer relationships from field to table
- Appeal to growing number of mountain biking/road cycling enthusiasts; leverage BC's growing reputation – successful crossover between slow food/cycling
- Shows relocating from Vancouver to TRADEX
- Growing awareness of Abbotsford as a player within aerospace industry and agri-tech industry (meetings, conferences, events, training etc.)
- MRDT legislation permits 3% rate generating larger pool of funds for destination marketing
- DBC Open Pool leveraged marketing offers up to \$250,000 in matched dollars for multi-community programs

# Threats

ELEMENTS IN THE TOURISM OR BUSINESS ENVIRONMENT THAT COULD CAUSE TROUBLE FOR ABBOTSFORD

- Speculation about a Surrey Trade Centre
- Criminal activities in/around Abbotsford erode destination brand building efforts
- Active competitors who own much of the same 'space' – Chilliwack, Langley, Surrey



# ABBOTSFORD'S UNIQUE SELLING PROPOSITION AND TARGET MARKETS

Based upon a review of available market research, Abbotsford's current situation analysis and knowledge of the strengths, weaknesses, opportunities and threats for tourism in Abbotsford, the following elements of the visitor experience should be considered as foundational to Abbotsford's unique selling proposition:

- Agricultural experiences – wide variety of family friendly farms and activities – growing number farm to table experiences – craft breweries/wineries/meadery
- Ideal multi-night stop on a longer touring journey through Western Canada or travelling to/from Okanagan and Vancouver Island
- Rich diversity here and a passion for the arts – museums, heritage sites, festivals, performing and visual arts contribute to and enhance your local experience
- Abbotsford 'knows aviation' – all aviation-related training, meetings, conferences, trade shows, consumer events will be best served here
- Sport tourism infrastructure, amenities and hospitality are all here to ensure a successful tournament/event

It is important to note that these statements are not the narrative actually used for promotional purposes but rather serve to inform the creation of stories and associated imagery/videography that leverage this unique selling proposition in compelling ways that motivate travel to Abbotsford.

The primary messaging should be accompanied by secondary messaging related to Abbotsford's easy and affordable access by road or by air. Select festivals and events can be featured as the primary 'lure' for a first visit to Abbotsford with effective messaging and promotion to showcase reasons to return.

Markets that should be targeted and offered specific Abbotsford experiences so as to achieve the objective of increasing overnight visitation, length of stay and visitor spending throughout the year include the following:

Target Market	Abbotsford Experience	Key Message Elements
Millennials – quick getaways from Lower Mainland	Craft breweries + unique experiences like sky diving (selfie shots), Tulip Festival	Suggested itineraries (including car sharing options)
Ale Trail Followers (all geographic markets)	Craft breweries, wineries, meadery + dining + accommodation	Field House; Old Abbey Ales; Ravens Brewing – feature unique flavours, awards, etc.
Family Vacations – Lower Mainland market	Memorable family experiences – easy hikes, farm experiences, opportunities to learn together, affordable accommodation and dining options	Connect to the land – connect to your family - suggested itineraries including, range of places to stay, family friendly activities
Regional BC/Alberta	Opportunity to break up the drive and enjoy a day of farm experiences, dining, shopping and affordable accommodation	Stop – Stay – Breath – Relax
Washington State/California	Arts, culture, heritage; agri-tourism experiences; great value (exchange)	'A' on your bucket list – Abbotsford must do's – feature best of Abbotsford experiences in sample 2, 3 and 5 day itineraries
Regional Mountain Biking	Part of Fraser Valley network of trails	Work through Mountain Bike BC to message Fraser Valley experience and showcase Abbotsford businesses

Target Market	Abbotsford Experience	Key Message Elements
Regional, Provincial, National and International Sport Tourism Event Organizers – shoulder season focus	Local clubs combine with sport tourism infrastructure + accommodation, dining, retail experiences	Abbotsford, home of the BC Summer Games has the facilities and amenities to host successful tournaments, races and other sporting events
Festival and Event Goers – Regional Drive Markets	Heritage, culture, live entertainment, family fun at events such as International Air Show, Agrifair, Tulip Festival, TRADEX upcoming events	Reasons to stay longer in Abbotsford – incorporate sample itineraries and packages that include festival/event admission, overnight stay
Shopping/Getaways – Regional Drive Markets	Combination of ‘big box retail’ + unique local arts and crafts packaged with accommodation and dining/possible festival or cultural event/show	Shop and stay packages – combine with festival or other events particularly in shoulder season
Touring Travellers – all geographic markets with particular European touring travellers	Spring/summer/fall touring market can use Abbotsford as a base for multi-night stay to experience entire Fraser Valley – feature accommodation, dining, central location along with wealth of outdoor and cultural experiences	Farm experiences, heritage, culture, stunning scenery and local hospitality – Abbotsford is the ideal base for several nights as part of a longer touring vacation
Asian Touring Groups	Authentic agricultural experiences	Message through Lower Mainland based tour operators – create itineraries to include in their tariff

Target markets can also be defined by their psychographic traits. The Explorer Quotient is a tool developed by Destination Canada to assist communities and businesses in understanding the psychographics of travellers – the reasons why they travel and the types of experiences they seek. This behavioral knowledge assists in identifying the types of travellers best suited to the product/experience being offered.

Traveller ‘types’ are defined and the destination or business is able to match the ‘type’ with the experiences they offer as a way of focusing marketing efforts on best potential customers and defining the nature of messaging/media tools that will reach and resonate with them. Additional information is available through Destination BC and on-line at [www.en.destinationcanada.com](http://www.en.destinationcanada.com). Destination Canada has identified the following Explorer Types as most attractive for the Canadian marketplace. Destination BC has confirmed that these markets are most relevant provincially:

- Free Spirits
- Cultural Explorers
- Authentic Experiencers

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Of the three priority segments identified by Destination BC, Abbotsford’s current visitor experiences would appear to best meet the experiential needs of Cultural Explorers and Authentic Experiencers. However, several additional traveller types may also be relevant for Abbotsford including:

- No Hassle Traveller – worry free travel spending time with family and friends
- Cultural History Buff – intrigued by the cultural diversity and history in Abbotsford

As marketing efforts progress and specific campaigns are formulated and launched, they should be informed by the additional psychographic intelligence available from the EQ program and data collection in the Abbotsford area. In particular, where a database of visitor postal codes can be aggregated, resources invested in a PRIZM5 analysis offered through Environics Analytics can provide invaluable insight into current visitor profiles.

# RECOMMENDED STRATEGIES

The following three core objectives are recommended to support achievement of Tourism Abbotsford’s mandate (restated below for easy reference):

## Objective #1 – Destination Marketing

**Tourism Abbotsford will conduct effective destination marketing in target markets with a focus on generating incremental overnight stays in paid accommodation.**

Marketing Abbotsford as a multi-night destination in the highest return target markets is a priority as this will lead to:

- Growing awareness of Abbotsford as a destination rather than a ‘pass through’
- Increasing visitation
- Longer lengths of stay
- Increasing occupancy levels and higher average daily rates in paid accommodation
- Greater visitor spending in all local businesses.

The recommended measures of success (the outcomes to be achieved) associated with this tourism objective are as follows:

- Growth in baseline MRDT revenues of 5% per year (as an indicator of occupancy/rate improvements at collecting accommodators)
- Increase in average length of stay and average daily spend in Abbotsford
- Improved shoulder season occupancy rates
- Growth in the overall value of the visitor economy in Abbotsford

	2013	2014	2015
Occupancy	49.1%	51%	57%
Eligible MRDT Revenue	\$11.3 million	\$11.8 million	\$14 million

### Destination Marketing Strategies

To achieve these objectives for destination marketing, the following strategies are recommended:

1. Invest in primary market research to understand current visitors to Abbotsford, perception and motivations in key markets (current visitors as well as those not choosing to visit Abbots-

- ford) and images/messages that would authentically reflect Abbotsford’s brand personality
2. Create a compelling brand identity and narrative for targeted travellers to Abbotsford
3. Secure additional on-brand marketing assets/content (imagery, videography) aligned with Destination BC brand and reflective of Abbotsford’s unique selling proposition and launch brand identity/messaging
4. Continue to support Destination BC generated media fan tours and proactively secure media coverage (online and print) to build awareness in all target markets highlighting key messages, positioning and unique selling proposition for Abbotsford
5. Update and enhance destination website to reflect unique selling proposition, brand identity and key messages in a user friendly, easily navigated format
6. Continue to actively engage in social media channels – grow following and follow others on Facebook, Twitter, Instagram using contests, intriguing images, stories; continue to target and host travel-based Instagrammers with large numbers of followers
7. Review range of print collateral and create a branded and integrated family of print/downloadable collateral
8. Continue to create marketing partnerships with other organizations, communities/destinations in order to leverage resources and market penetration where multi-destination approach is more compelling to travellers (e.g. Fraser Valley group)
9. Invest in select print and digital advertising (boosting, geo-targeted digital advertising)
10. Create and promote (with cooperative marketing opportunities where appropriate) sample itineraries and packages including accommodation/activities (web, social media, editorial, select print/digital advertising) directed at various target audiences
11. Promote Abbotsford as a multi-night destination for touring travellers
12. Proactively target and secure additional sport hosting opportunities and maximize associated length of stay/spending/repeat visitation
13. Support existing or potential new events for 1-2 shoulder season events that would grow to a scope/scale that would warrant visitation and overnight stays e.g. Tulip Festival, Autumn Culinary/Harvest event (Feast on the Fraser, Feast of Fields, Cultivate type events)
14. Target meetings, conferences, exhibits and training programs related to the aviation industry (direct sales approach)

## Objective #2 – Visitor Servicing

Tourism Abbotsford will provide visitors with information where/when/how they need it to support longer lengths of stay and increased spending and,

Tourism Abbotsford will support tourism operators and the community at-large to deliver remarkable visitor experiences

Continuing to invest in innovative visitor servicing and connecting tourism businesses and residents with the information, education and capacity building they need will ensure Abbotsford is:

- Providing visitors with consistently remarkable experiences
- Sharing information with visitors when, where and how needed to encourage them to stay longer and spend more with Abbotsford businesses
- Supporting Abbotsford residents to become visitor ‘ambassadors’

Foundational to growing the overall visitor economy is the ability of all tourism operators and residents to provide visitors with outstanding experiences/interactions and for visitors to readily receive additional information that contributes to a decision to stay longer in Abbotsford, enjoy more quality experiences and share/promote Abbotsford to their own social networks.

Every Abbotsford ‘touchpoint’ with the potential visitor from initial inquiry during trip planning to front-line staff interactions to attitudes of the community at-large should be friendly, easily navigated and compelling. All stakeholders and residents of Abbotsford should be visitor ambassadors who are educated about the experiences available and the many reasons for travellers to stay longer.

The recommended measures of success are as follows:

- Increase in ‘net promoter score’ - the likelihood that visitors will recommend Abbotsford to friends, family and colleagues (see note below)
- Increase average length of stay and average daily spend in Abbotsford

Note: The Net Promoter Score (NPS), developed by Frederick Reichheld and Bain & Company in 2002, is a simple metric that helps organizations monitor the engagement of their customers. It reflects the likelihood that customers will recommend a product/company/place to friends, family or colleagues.

In the context of the tourism industry, NPS is based on responses to the question, “How likely are you to recommend [British Columbia] as a travel destination to a friend, family member or colleague?” Responses are scored from 0 = “not at all likely” to 10 = “extremely likely”. Respondents are divided into three categories:

- Detractors (scores of 0 to 6): Unhappy visitors, unlikely to tell others to visit and might even damage the reputation of a destination through negative word of mouth.

- Passives (scores of 7 or 8): Marginally satisfied visitors not excited enough to tell others about their travel experience.
- Promoters (scores of 9 or 10): Loyal enthusiasts likely to return and rave about their travel experience.

NPS is calculated by subtracting the percentage of detractors from the percentage of promoters.



The intention to recommend a travel destination, reported by the NPS, is a proxy measure of overall satisfaction with the travel experience. Satisfaction with the travel experience and the intention to recommend greatly increase the likelihood of a return visit to Abbotsford. And word of mouth advocacy, either face-to-face or through social media, is critical for attracting first time visitors to Abbotsford.

NPS is regarded by researchers as the question that best predicts the future growth of customer centric businesses like the tourism industry. Many tourism businesses and destination management organizations, including Destination Canada and Destination BC, are also measuring NPS to help monitor and measure efforts to improve customer loyalty.

The original research that developed NPS is described in an article by Frederick F. Reichheld in the Harvard Business Review: <https://hbr.org/2003/12/the-one-number-you-need-to-grow>.

### Visitor Servicing Strategies

**To achieve these visitor servicing objectives, the following strategies are recommended:**

1. Manage destination content on key sites such as Trip Advisor/ Expedia/ Google/Facebook
2. Review current Visitor Centre location and staffing model to consider either seasonal closure or repurposing of site as an Abbotsford showcase (like the Penticton wine store model)
3. Leverage the existing base of visitation to Abbotsford that are travelling for festivals, events, performances or other reasons (e.g. TRADEX attendees, Abbotsford Centre attendees, International Air Show/Agrifair attendees, travellers using Abbotsford International Airport, University of the Fraser Valley students/families)
4. Assess experiential quality of businesses and act as a conduit for business service and training programs that will enhance visitor experience standards
5. Create opportunities for local tourism businesses to collaborate and network and to improve industry and market knowledge
6. Create opportunities to educate and engage residents on visitor experiences available in Abbotsford and on the value of the tourism economy

## Objective #3 – Destination Development

Tourism Abbotsford will contribute tourism knowledge and expertise to ensure the visitor perspective is considered in all significant local projects/ventures

### Providing this knowledge and expertise will ensure Abbotsford is:

- Increasing its breadth and depth of compelling visitor experiences
- Providing the necessary infrastructure and amenities to visitors to encourage longer lengths of stay, repeat visitation and favourable referrals

The ability to provide a visitor 'lens' on local dialogue and debate regarding investments in access, infrastructure or experiences/ services/amenities being considered by both the private and public sector will ensure informed decisions and alignment of resources for maximum return. With the exception of possible financial support for existing or new festivals, events, sport tournaments, it is not recommended that Tourism Abbotsford invest resources in

the actual development of visitor experiences. The contribution by Tourism Abbotsford of knowledge of market conditions, opportunities and gaps in the current inventory of experiences will provide important insight to the decision and investment making process of others in the private and public sector.

### The recommended tourism objectives associated with this priority area are as follows:

- The perspective of the tourism industry is considered in all significant local government and Provincial capital projects (e.g. marina site, boat launch, Provincial Parks infrastructure etc.)
- Market intelligence is available for private sector entrepreneurs to support their feasibility analysis and business case development related to tourism ventures

### Destination Development Strategies

To achieve these destination development objectives, the following strategies are recommended:

1. Attend/participate in various planning forums related to OCP Neighbourhood Plans, Parks/Recreation (including trail development), Transportation, Signage and Wayfinding, Downtown Revitalization/Beautification etc.)
2. Attend/participate in Destination BC's Destination Development Program sessions (i.e. Fraser Valley, Gold Rush Trail)
3. Detailed descriptions for each strategy follow



# Detailed Destination Marketing Strategies

<b>Description</b>	<b>1 Invest in primary market research to understand current visitors to Abbotsford, traveller perceptions and motivations in key markets (current visitors as well as those not choosing to visit Abbotsford) and images/messages that would authentically reflect Abbotsford’s brand personality</b>
<b>Specific Initiatives/Actions</b>	<p>Commission primary research to ascertain perceptions and motivations of current visitor base</p> <p>Commission primary research to ascertain perceptions and motivations of target travellers in-market (including those who are not choosing to visit Abbotsford)</p> <p>Commission primary research to identify images/messages that authentically reflect Abbotsford’s brand personality</p> <p>Conduct annual visitor intercept survey to measure Net Promoter Score, area of origin, motivating activities, areas to improve etc.</p> <p>Conduct annual stakeholder survey (required for communities having the 3% MRDT)</p> <p>Develop a database of visitor postal codes and invest in Prizm5 data analysis to further understand nature and motivations of travellers to Abbotsford</p>
<b>Rationale/Objectives</b>	<p>Primary market research enhances understanding of visitor perceptions and destination performance allowing fine-tuning of strategic investments</p>
<b>Responsibility</b>	<p>Tourism Abbotsford with contracted research assistance</p>
<b>Partnerships/Leveraging Opportunities</b>	<p>Abbotsford tourism stakeholders</p>
<b>Timing</b>	<p>2018 and ongoing annually</p>
<b>Budget</b>	<p>30,000</p>
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Primary market research available to inform future planning</li> </ul>

**Description****2 Create a compelling brand identity and narrative for Abbotsford****Specific Initiatives/Actions**

Work with City of Abbotsford, key stakeholders and a consultant/designer to develop a compelling brand identity that captures unique selling proposition of the area from a visitors' perspective. This identity should leverage the iconic and inimitable found only in Abbotsford.

Include consideration of various naming conventions, tag lines as well as brand attributes.

Build knowledge and understanding of the Canada brand and the British Columbia brand. For maximum impact, ensure brand identity is aligned with provincial brand managed by Destination BC.

Develop several preferred options and review with tourism stakeholders and community at large.

If funding permits, secure additional primary market research from target markets to test top 2-3 selections and ensure identity resonates in the marketplace.

Develop brand standards manual for approved identity to provide guidance to all those authorized to use brand.

**Rationale/Objectives**

Abbotsford does not have a compelling and memorable brand identity and it is unclear today what Abbotsford is offering the visitor as an overnight destination. While an identity alone will not increase visitation, it is an important tool to build awareness and convey the area's unique selling proposition to those considering travel.

**Responsibility**

Tourism Abbotsford with contracted design assistance

**Partnerships/Leveraging Opportunities**

City of Abbotsford, tourism stakeholders, residents of Abbotsford

**Timing**

Refreshed brand identity for 2018

**Budget**

20,000

**Measuring Success**

- Research informed, community supported brand identity for Abbotsford ready for launch in 2018

<b>Description</b>	<b>3 Secure additional on-brand marketing assets/content (imagery, videography, blog stories) aligned with Destination BC brand and reflective of Abbotsford's unique selling proposition and launch brand identity/messaging</b>
<b>Specific Initiatives/Actions</b>	<p>Confirm proposed key messages for each target market within umbrella Abbotsford brand.</p> <p>Secure high-quality on-brand experiential photography and videography that captures compelling images for each market segment targeted and is aligned with provincial branding.</p> <p>Commission additional social media content (blog stories, vignettes etc.) regularly to keep followers engaged</p> <p>Meet with key marketing partners (Destination BC, etc.) to share target markets, key messages and brand imagery and to ensure Abbotsford is appropriately represented in partner destination marketing efforts.</p> <p>Share brand identity with local tourism operators to ensure an understanding of brand positioning and how they can align their efforts.</p>
<b>Rationale/Objectives</b>	High quality experiential photography and videography will allow potential visitors to see themselves 'in the activity' and motivate participation. Marketing partners' excitement needs to be built and maintained for Abbotsford as a destination.
<b>Responsibility</b>	Tourism Abbotsford with contracted assistance from photographers/videographers, bloggers
<b>Partnerships/Leveraging Opportunities</b>	Destination BC has commissioned new 'on brand' imagery and videography of all tourism regions. This new inventory should be reviewed first to determine 'gaps' for Abbotsford. A potential partnership with neighbouring communities with application to DBC 'open pool' can be considered to secure imagery/videography not yet available.
<b>Timing</b>	2018 Open Pool application with regional partners;
<b>Budget</b>	25,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Variety of 'on brand' images representing Abbotsford experiences for target markets</li> <li>▪ Deployment through all marketing initiatives</li> </ul>

<b>Description</b>	<b>4 Support Destination BC generated media fam tours and proactively secure media coverage to build awareness in all target markets highlighting key messages, positioning and unique selling proposition for Abbotsford</b>
<b>Specific Initiatives/Actions</b>	<p>Respond to Destination BC generated requests related to upcoming media fam tours</p> <p>Develop tools to engage in and maximize media opportunities – i.e. develop unique story ideas, itineraries, imagery, generate press releases etc.</p> <p>Proactively work with DBC on media opportunities. Regularly share story ideas, itineraries and imagery so that DBC can include Abbotsford in their media outreach tactics and media events (e.g. Canada Media Marketplace)</p> <p>Investigate and identify influential blogs, forums and key influencers, pitch and secure coverage relevant to markets being targeted</p> <p>Attend travel bloggers conferences such as (TBEX) and host key bloggers</p>
<b>Rationale/Objectives</b>	Travellers are influenced by word of mouth and personal experience. Editorial coverage provides a proxy for this word of mouth and builds awareness in target markets
<b>Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Destination BC and tourism stakeholders (for fam support)
<b>Timing</b>	2018 and annually thereafter
<b>Budget</b>	18,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Advertising equivalency of media coverage</li> <li>▪ Number of journalists/key publications hosted</li> <li>▪ Growth in value of tourism economy in Abbotsford</li> </ul>

<b>Description</b>	<b>5 Update and enhance destination website to reflect unique selling proposition, brand identity and key messages in a user friendly, easily navigated format</b>
<b>Specific Initiatives/Actions</b>	<p>Incorporate branding elements into destination website</p> <p>Incorporate itinerary suggestions to convey reasons to stay/things to do for multiple nights e.g. Two days in Abbotsford...etc.</p> <p>Incorporate sample packages (with call to action to hotel) to stimulate traveller movement along 'path to purchase' and convey affordability</p> <p>Continue to monitor web statistics</p> <p>Ensure strong mobile website</p>
<b>Rationale/Objectives</b>	A strong web presence that is user friendly and easy to navigate to relevant information for the traveller will support all segments and responds to market research regarding growing use of the internet for travel planning.
<b>Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	
<b>Timing</b>	2018 and updates thereafter
<b>Budget</b>	20,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Number of unique visits</li> <li>▪ Number of referrals to stakeholder websites</li> <li>▪ Size of subscribed email database for future direct marketing</li> </ul>

Description	<b>6 Continue to actively engage in social media channels – create a following and follow others with their own large following</b>
Specific Initiatives/Actions	<p>Continue to engage in social media outreach using innovative engagement tactics</p> <p>Build relationships with local Abbotsford influencers and incorporate destination messaging into their reach.</p> <p>Identify and host Instagrammers/bloggers etc. with large personal followings to build Abbotsford awareness and intrigue</p>
Rationale/Objectives	Social media channels are utilized by travellers and can influence destination choice and length of stay
Responsibility	Tourism Abbotsford
Timing	2018 and ongoing
Budget	Staff time
Measuring Success	<ul style="list-style-type: none"> <li>▪ Size of email database for future direct marketing</li> <li>▪ Contest participation rates</li> <li>▪ Social media 'Likes'/'Follows' and reach</li> <li>▪ Instagram posts</li> <li>▪ Blog engagement</li> </ul>

Description	<b>7 Design, print and distribute Abbotsford 'family' of branded collateral</b>
Specific Initiatives/Actions	<p>Incorporate branding, itinerary ideas and print Abbotsford Circle Farm maps</p> <p>Incorporate branding, itinerary ideas and print Abbotsford Beer &amp; Wine Tour Maps</p> <p>Participate in the Fraser Valley Experiences Guide</p>
Rationale/Objectives	Downloadable PDF's and print collateral provide a means to communicate reasons to visit and stay longer in Abbotsford
Responsibility	Tourism Abbotsford
Partnerships/Leveraging Opportunities	Chilliwack/Langley
Timing	2019 and annually thereafter
Budget	
Measuring Success	<ul style="list-style-type: none"> <li>▪ Growth in value of tourism economy in Abbotsford</li> </ul>

## Description

### 8 Continue to create marketing partnerships with other organizations, communities/destinations in order to leverage resources and market penetration

#### Specific Initiatives/Actions

#### Destination BC:

Maximize [www.hellobc.com](http://www.hellobc.com) –work with Destination BC to ensure Abbotsford content is up to date and reflective of branding, messaging and unique selling proposition.

Regularly review DBC’s content calendar to view upcoming content development themes and projects and see where Abbotsford might fit best.

Engage with Destination BC’s social media channels <http://www.destinationbc.ca/Programs/Consumer-and-Industry/Social-Media.aspx>. Use the #explorebc hashtag when posting to social media, to contribute to the user generated content database of images that DBC can utilize.

Send updates, story ideas and press releases to the Global Content Team and/or VCM Regional Representatives on a regular basis, so that Abbotsford is included in Destination BC content development

Share story ideas with Destination BC’s Travel Media Team and secure representation through their staff at key media events like Canada Media Marketplace.

Share iconic trip ideas in Abbotsford for consideration by DBC’s North America Travel Trade’s quarterly e-newsletter distributed to 2,000+ travel agents and tourism operators.

#### Community DMO’s/Neighbouring Communities:

Continue Fraser Valley partnership (Experiences guide, website, Circle Farm Tour) but ensure focus is on promotion of experiences incorporating overnight stays and that there is a clear call to action to book travel.

Pilot Abbotsford participation in ‘Feast on the Fraser’ with New Westminster. Investigate Abbotsford extensions of Cultivate and/or Feast of Fields.

#### Other Partners:

**Aboriginal Tourism BC (AtBC), Sumas First Nation** to support development of authentic Aboriginal cultural experiences.

**BC Ale Trail** - secure profile for Abbotsford breweries in the BC Ale Trail [www.bcaletrail.ca](http://www.bcaletrail.ca)

**Mountain Biking BC** – continue membership in Mountain Bike BC through Fraser Valley group and receive community profile on website and participate in media trips, social media engagement, etc.

#### Rationale/Objectives

Leveraging resources with other communities and organizations for mutual benefit is necessary with limited funds for marketing and promotion.

#### Responsibility

Tourism Abbotsford

#### Partnerships/Leveraging Opportunities

Other communities, organizations as listed

#### Timing

2018 and ongoing

#### Budget

20,000

#### Measuring Success

- Number of collaborative marketing initiatives executed
- Growth in value of tourism in Abbotsford

**Description****9 Invest in select print and digital advertising (boosting, geo-targeted digital advertising)****Specific Initiatives/Actions**

Invest in digital advertising on select platforms such as Trip Advisor or Expedia, geotargeting those searching on key terms such as 'farm tours', 'air show', etc. (possibly with coop 'buy-in' opportunities for stakeholders)

**Rationale/Objectives**

Targeted advertising in select markets will build awareness and motivate trial

**Responsibility**

Tourism Abbotsford

**Partnerships/Leveraging Opportunities**

Participating tourism stakeholders

**Timing**

2018 and beyond

**Budget**

5,000

**Measuring Success**

- Track call to action (website landing page or other form of fulfillment such as accommodation bookings)
- Increased value of tourism in Abbotsford

<b>Description</b>	<b>10 Create and promote (with cooperative marketing opportunities where appropriate) sample itineraries and packages including accommodation/ activities (web, social media, editorial, select print/digital advertising)</b>
<b>Specific Initiatives/Actions</b>	<p>Create a series of sample itineraries and packages that assist the traveller in understanding the Abbotsford experience as a multi-night destination using themes of interest (family farm fun, eat/drink and pick berries) as well as around select festivals and TRADEX/Abbotsford Centre events and performances.</p> <p>Promote in target markets.</p> <p>Secure cooperating marketing dollars from participating stakeholders and promote in relevant media channels such a local newspapers, website, social media channels</p>
<b>Rationale/Objectives</b>	<p>Target travellers need assistance understanding the range of experiences available to them in Abbotsford and the value proposition offered. Promotion of specific package opportunities will 'seed' their thought process and allow them to move to the 'movie creation' stage on the path to purchase. While not all will actually buy the specific package being promoted, they will be stimulated to learn more about travel opportunities to Abbotsford</p>
<b>Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Tourism stakeholders
<b>Timing</b>	2018 and ongoing
<b>Budget</b>	15,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Increased business results reported by tourism stakeholders vs. baseline during promotion period</li> <li>▪ Web traffic/landing page visits for getaways</li> <li>▪ Event attendance</li> <li>▪ Growth in value of tourism economy in Abbotsford</li> </ul>

**Description****11****Promote Abbotsford as a multi-night destination for touring travellers****Specific Initiatives/Actions**

Work with Destination BC to promote Abbotsford as a multi-night destination for touring travellers undertaking a Western Canada or BC itinerary

Promote on website and in social media

Promote via RV rental companies (FraserWay location in Abbotsford)

**Rationale/Objectives**

Abbotsford offers natural and cultural experiences that warrant a multi-night stay by touring travellers

**Responsibility**

Tourism Abbotsford

**Partnerships/Leveraging Opportunities**

Destination BC takes the lead in long-haul marketing and promotion and are able to represent Abbotsford at various trade and consumer shows

**Timing**

2019 and beyond

**Budget**

10,000

**Measuring Success**

- Growth in value of tourism economy in Abbotsford

Description

## 12 Proactively target and secure additional sport hosting opportunities and maximize associated length of stay/spending/repeat visitation

Specific Initiatives/Actions	<p>Ensure content on <a href="http://www.viasport.ca">www.viasport.ca</a> is accurate and up to date and apply for grant assistance as appropriate and available</p> <p>Form a Sport Tourism Advisory Group</p> <p>Provide support to local sports clubs and assistance in bid identification and submission preparation</p> <p>Develop readily customizable flatsheets featuring all local services and amenities for attendees and participants</p> <p>Promote pre-event training opportunities</p> <p>For larger scale events, make available special offers and assist in creating participant welcome package that features dining, shopping, extend your stay offers to maximize attendee length of stay, spending and intention to return</p> <p>Create database of attendees and promote 'come again' packages to encourage return visitation</p> <p>Collaborate with other BC communities (Kamloops, Langley, Trail etc.) to re-energize and leverage information and resources on previous provincial sport hosting website</p>
Rationale/Objectives	<p>Abbotsford has excellent sport hosting infrastructure and facilities in a wide range of activities. These facilities are capable of hosting regional, Provincial and in some cases National events. Every additional event hosted will contribute to overnight stays, retail and restaurant spending and offers a significant return to all tourism businesses at all times of year, and particularly in shoulder season.</p>
Responsibility	Tourism Abbotsford
Partnerships/Leveraging Opportunities	Province of BC recently launched their event hosting resources and associated financial support <a href="http://www.gov.bc.ca/eventhosting">www.gov.bc.ca/eventhosting</a>
Timing	2018 and beyond
Budget	50,000
Measuring Success	<ul style="list-style-type: none"><li>▪ Number of sport tourism events hosted</li><li>▪ Size of database of attendees/participants for future marketing</li><li>▪ Growth in value of tourism in Abbotsford</li></ul>

**13 Support existing or potential new events in shoulder season that offer potential to grow to a scope/scale that would warrant visitation and overnight stays e.g. Tulip Festival, Hop Fest, Autumn Culinary/Harvest event (Feast on the Fraser, Feast of Fields, Cultivate type events)**

**Description**

Continue to provide marketing support for select events that meet criteria related to business impacts

**Specific Initiatives/Actions**

Identify opportunities with existing festivals (Tulip Festival, Air Show, Agrifair etc.) to extend visitor experience and act as facilitator of these discussions with all tourism stakeholders with objective of expanding program to motivate travel and eventually overnight visitation  
Review opportunities to host third party event producers and/or invest in a new signature Abbotsford event.

**Rationale/Objectives**

Festivals and events serve to introduce visitors to a destination and motivate travel during shoulder seasons.

**Responsibility**

Tourism Abbotsford

**Partnerships/Leveraging Opportunities**

Festival/event organizers; tourism stakeholders with ability to extend visitor programming

**Timing**

2018 and beyond

**Budget**

15,000

**Measuring Success**

- Increase occupancy and visitor spending during shoulder season events

**Description****14 Target meetings, conferences, exhibits and training programs related to the aviation industry (direct sales approach)****Specific Initiatives/Actions**

Work together with Airport, TRADEX and meeting space providers to identify and target meetings, conferences, exhibits and training programs in the aviation industry

Create necessary bids/proposals and supporting sales collateral

**Rationale/Objectives**

Abbotsford has a growing reputation for all things aviation and has meeting facilities in hotel properties to pursue this segment

**Responsibility**

Tourism Abbotsford

**Partnerships/Leveraging Opportunities**

Airport Authority; TRADEX; hotels and conference centres with meeting space; University of the Fraser Valley, Economic Development

**Timing**

2019

**Budget**

15,000

**Measuring Success**

- Number of proposals/bids
- Number of aviation-related meetings and events held and associated participant room nights
- Growth in value of visitor economy in Abbotsford

# Detailed Visitor Experience Strategies

<b>Description</b>	<b>15</b> Manage destination content on key sites such as Trip Advisor/Expedia/ Google/Facebook
<b>Specific Initiatives/Actions</b>	<p>Continue to manage Abbotsford destination content on third party platforms</p> <p>Engage in destination forums providing timely responses to traveller questions (e.g. Tripadvisor forums for Abbotsford)</p> <p>Initiate changes and monitor</p>
<b>Rationale/Objectives</b>	<p>Travellers are increasingly utilizing third party platforms to secure travel information and ask questions. Platforms like Tripadvisor are now not only assessing specific experiences/businesses but also providing more general destination information presenting the opportunity to influence content as well as to respond to traveller inquiries</p>
<b>Responsibility</b>	<p>Tourism Abbotsford</p>
<b>Partnerships/Leveraging Opportunities</b>	<p>Tourism stakeholders need to manage their own presence to ensure collectively the destination is being well rated</p>
<b>Timing</b>	<p>2018 and beyond</p>
<b>Budget</b>	<p>Staff time</p>
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Destination reviews</li> <li>▪ Overall value of tourism economy in Abbotsford</li> </ul>

**Description****16 Review current Visitor Centre location and staffing model to consider either seasonal closure or repurposing of site as an Abbotsford showcase****Specific Initiatives/Actions**

Reduce current Visitor Centre hours of operation and staffing levels in shoulder seasons (redirect staff time to other initiatives); supplement with community volunteer program and continue Summer Student grant funding

Investigate repurposing of current physical location and assess feasibility of an Abbotsford 'showcase' similar in concept to Penticton wine store model

**Rationale/Objectives**

Touring travellers still utilize the services and amenities of the Visitor Centre network and this interaction provides an opportunity for well-trained VC staff to share Abbotsford experiences and encourage longer stays. However, Destination BC research confirms that visitors are increasingly using mobile information sources and communities must consider innovative visitor servicing strategies to speak with travellers outside of 'bricks and mortar' facilities

**Responsibility**

Tourism Abbotsford

**Partnerships/Leveraging Opportunities**

City of Abbotsford

**Timing**

2018

**Budget**

5,000

**Measuring Success**

- VC Statistics – number of parties; number of visitors
- Reported length of stay
- Feasibility assessment
- Increasing value of visitor economy in Abbotsford

<b>Description</b>	<b>17 Leverage the existing base of visitation to Abbotsford that are travelling for festivals, events, performances or other reasons (e.g. TRADEX attendees, Abbotsford Centre attendees, International Air Show/Agrifair attendees, travellers using Abbotsford International Airport, University of the Fraser Valley students/families)</b>
<b>Specific Initiatives/Actions</b>	<p>Have VC staff presence at key locations and events where visitors congregate (sport tournaments, festivals etc.)</p> <p>Utilize contesting to enhance permission-given database of visitors and their interests for follow-on targeted e-marketing campaigns</p> <p>Collect postal codes for potential use in Prizm 5 analysis market research</p> <p>Apply to Destination BC Innovation Fund in fall 2016 for additional innovative visitor servicing projects in Abbotsford commencing April 1, 2017</p>
<b>Rationale/Objectives</b>	A mobile Visitor Centre brings information to visitors and provides an opportunity to interact and motivate longer lengths of stay
<b>Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Festivals, events, facilities that attract density of visitors; City of Abbotsford (parks/trails presence);
<b>Timing</b>	2018 and beyond
<b>Budget</b>	10,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>▪ Number of visitors/parties engaged</li> <li>▪ Reported length of stay</li> <li>▪ Increasing value of visitor economy in Abbotsford</li> </ul>

Description

# 18 Assess experiential quality of businesses and act as a conduit for business service and training programs that will enhance visitor experience standards

Specific Initiatives/Actions	<p>Conduct visitor experience assessments and identify common opportunities to enhance visitor experience</p> <p>Promote <b>Tourism Business Essentials</b> educational tools and online resources available through Destination BC at no charge to local businesses.</p> <p>Offer Online Reputation Management workshop to all businesses</p> <p>Launch a Abbotsford ‘ambassador’ program for all front-line staff and residents – include culture and history of Abbotsford, natural environment, things to do, etc.</p> <p>Facilitate/subsidize additional identified training initiatives (bringing in third party providers where appropriate) in order to raise the standard of experiential delivery throughout Abbotsford</p>
Rationale/Objectives	Enhancing the quality of the visitor experience itself is becoming one of the most effective marketing investments that can be made by a destination
Responsibility	Tourism Abbotsford
Partnerships/Leveraging Opportunities	Chamber of Commerce; City of Abbotsford
Timing	2019 and ongoing
Budget	10,000
Measuring Success	<ul style="list-style-type: none"><li>Increasing Net Promoter score</li><li>Increasing value of tourism economy in Abbotsford</li></ul>

**Description****19 Create opportunities for local tourism businesses to collaborate and network and to improve industry and market knowledge**

<b>Specific Initiatives/Actions</b>	<p>Evolve weekly flatsheet/central calendar to educate business owners and to influence hours of operation to accommodate visitor needs</p> <p>Create series of tourism business profiles for e-distribution</p> <p>Host tourism lunches with guest speakers</p> <p>Offer stakeholder input sessions as part of annual marketing plan development and update</p> <p>Incorporate Tourism Award in to the Chamber's Business Excellence Awards</p>
<b>Rationale/Objectives</b>	<p>Successful destinations work collaboratively and leverage the strengths of each stakeholder .Through information sharing, networking and celebrating success, Tourism Abbotsford can facilitate relationship building within the entire tourism industry.</p>
<b>Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Chamber of Commerce, tourism stakeholders
<b>Timing</b>	2018 and beyond
<b>Budget</b>	15,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>Increasing number of collaborative initiatives amongst tourism stakeholders</li> </ul>

**Description****20 Create opportunities to educate and engage residents on visitor experiences available in Abbotsford and on the value of the tourism economy**

<b>Specific Initiatives/Actions</b>	<p>Develop and distribute 'What's On' weekly flatsheet/central calendar to educate residents</p> <p>Launch a Abbotsford 'ambassador' program for all front-line staff and residents – include culture and history of Abbotsford, natural environment, things to do, etc.</p> <p>Conduct the Value of Tourism study and communicate its contribution to the local economy.</p> <p>Consider periodic tourism features in local newspaper.</p>
<b>Rationale/Objectives</b>	<p>Enhanced knowledge and appreciation for visitors will continue to improve the visitor experience creating 'remarkable experiences'</p>
<b>Lead Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Destination BC; Chamber of Commerce; City of Abbotsford/Economic Development
<b>Timing</b>	2018 and ongoing
<b>Budget</b>	10,000
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>Conduct Value of Tourism study and communicate</li> <li>Increasing net promoter score</li> </ul>

# Detailed Destination Development Strategies

<b>Description</b>	<b>21 Attend/participate in various planning forums related to OCP Neighbourhood Plans, Parks/Recreation (including trail development), Transportation, Signage and Wayfinding, Downtown Revitalization/Beautification etc.)</b>
<b>Specific Initiatives/Actions</b>	Participate in planning forums having relevance and impact on the visitor experience. Examples include: OCP neighbourhood plans, trail development, zoning restrictions etc.
<b>Rationale/Objectives</b>	The whole of the visitor experience includes much more than branding, marketing and visitor services and successful tourism destinations embed and consider the visitor perspective throughout all their planning processes
<b>Lead Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	City of Abbotsford
<b>Timing</b>	2018 and ongoing
<b>Budget</b>	Staff time
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>Visitor perspective considered in all planning processes</li> </ul>

<b>Description</b>	<b>22 Attend/participate in Destination BC's Destination Development Program sessions (i.e. Fraser Valley, Gold Rush Trail)</b>
<b>Specific Initiatives/Actions</b>	Participate in planning forums having relevance and impact on the visitor experience. Examples include: Fraser Valley, Gold Rush Trail development etc.
<b>Rationale/Objectives</b>	The whole of the visitor experience includes much more than branding, marketing and visitor services and successful tourism destinations embed and consider the visitor perspective throughout all their planning processes
<b>Lead Responsibility</b>	Tourism Abbotsford
<b>Partnerships/Leveraging Opportunities</b>	Destination BC
<b>Timing</b>	2018 and ongoing
<b>Budget</b>	Staff time
<b>Measuring Success</b>	<ul style="list-style-type: none"> <li>Visitor, local and regional partner perspective considered in all planning processes</li> </ul>

# RESOURCE ALLOCATION

Detailed budget allocations against the identified strategies will occur and an annual operating plan for Tourism Abbotsford will be reviewed and approved by the Board of Directors. Broad guidance for this annual resource allocation exercise is provided below:

## Resource Allocation - Tourism Objectives:

Objective	Activity	Range of Resource Allocation
1	Destination Marketing	40% - 50%
2	Visitor Servicing	15% - 25%
3	Destination Development	0%*
4	Salaries/Administration	45% - 55%

\*Destination development strategies are anticipated to only require staff time.

## Resource Allocation – Nature of Visitor Experience/ Motivating Activity

Motivating Activity	Range of Resource Allocation
Agri-tourism	20% - 25%
Sport tourism	20% - 30%
Art/Culture/Heritage	5% - 15%
Festivals/Events	10% - 25%
Touring Travellers**	10% - 15%
Passing Through Travellers***	0% - 15%

\*\*Touring Travellers are long-haul travellers typically from Europe or the United States on a journey of several weeks through Western Canada or to Alaska that pass through Abbotsford and who could be encouraged to stay longer

\*\*\*Passing Through Travellers are typically travellers from Alberta or the Okanagan en route to Vancouver Island or returning therefrom who pass through Abbotsford and who could be encouraged to stay longer

## Resource Allocation – By Season of Travel

Season	Range of Resource Allocation
Spring	30% - 40%
Summer	20% - 40%
Autumn	20% - 35%
Winter	10% - 30%

Spring in particular is seen as an opportunity to build visitation. Summer focus is on extending length of stay and yield per visitor. Higher allocations to autumn and winter would typically occur only in relation to specific high impact sport tourism events (e.g. Baton Championship). The following seasonal opportunities were specifically identified for further consideration in more detailed annual plans:

**Spring** (generally themed on renewal/revival/get outside again):

- Tulip Festival/Agri Bloom
- Health and wellness (including locally grown foods; farm to fork, slow food)
- Mobile visitor servicing

**Summer**

- Focus on those coming to Abbotsford already – messaging to stay longer, come again
- Affordable family destination
- Mobile visitor servicing

**Autumn**

- Sport tourism
- Agri-tourism/harvest time
- Possible investment in a signature event

**Winter**

- Sport tourism
- Maximize length of stay/spend associated with TRADEX & Abbotsford Centre events
- Shopping packages (e.g. Highstreet tree lighting etc.)

## Resource Allocation – By Visitor Area of Origin

Area of Origin	Range of Resource Allocation
Lower Mainland	15% - 40%
BC Interior	20% - 30%
Vancouver Island	20% - 30%
Alberta	10% - 20%
Ontario (direct flights from Toronto/Hamilton)	0% - 5%
US Drive	10% - 20%
Europe	5% - 10%
Asia	5% - 10%

### Lower Mainland

- Affordable
- Accessible
- Farm fresh, local food

### BC Interior/Vancouver Island

- Travelling through? Stop/stay and experience Abbotsford

### Alberta

- Travelling through? Stop/stay and experience Abbotsford

### Ontario

- Choose Abbotsford International Airport – include Abbotsford in your travel itinerary

### US Drive

- Possible partnership with Bellingham

### Europe

- Possible partnership with Fraserway RV

### Asia

- Agricultural experiences

## Resource Allocation – By Demographic

Resource allocation between families and couples was roughly equally split with little emphasis on singles. Resource allocation was also roughly split between Millennials and Boomers.

## Resource Allocation – By Strategy Area over Time

Fourteen strategic directions for Tourism Abbotsford in the next five years have been identified by the Board of Directors after considering input received during the stakeholder engagement process. These strategic directions are as follows:

1. Invest in Primary Market Research (Objective #1 – Destination Marketing)
  - Perceptions Study – current perceptions of Abbotsford amongst target travellers; points of difference relative to competition
  - Visitor Intercept – Net Promoter Score – quality of current visitor experience
  - Branding – images/messages that would authentically reflect Abbotsford’s brand personality and promise AND are compelling to target travellers
2. Undertake a comprehensive Branding Review (Objective #1 – Destination Marketing) to determine Abbotsford’s lead messaging/imagery/tone to convey unique selling proposition and motivate trial and return visitation
3. Leverage Existing Opportunities (Objective #1 – Destination Marketing + Objective #2 – Visitor Servicing) by investing in engagement strategies with visitors that are already coming to/passing by Abbotsford to convince them to stay longer, see more of Abbotsford, return for more (Highway #1 traffic; TRADEX delegates/attendees; Abbotsford Centre attendees; university students and their families, Air Show and other Festival attendees; Circle Farm Tour visitors etc.)
4. Invest in Traditional Media and Social Media (Objective #1 – Destination Marketing) Influencers who have large followings themselves (some of whom are local to Abbotsford) as well as in owned channels (journalists, photographers, culinary guru’s, others speaking with the same target markets) to share stories of Abbotsford, images, host them locally including the creation and curation of compelling content
5. Create and Promote Multi-Night Themed Packages (Objective #1 – Destination Marketing) to help target visitors create their own ‘video’ of their potential experience in Abbotsford – website presence, social media discussion, digital and print advertising, possible additional print collateral (as well as continued production and profile in Fraser Valley Travel Guide)
6. Invest in Agri-tourism promotion and product extensions (Objective #1 – Destination Marketing + Objective #2 – Visitor Servicing + Objective #3 – Destination Development) - Abbotsford Circle Farm Tour/Fraser Valley Circle Farm Tour, Specialty Beer and Wine Tour, Feast on the Fraser, Ale Trail participation and product extensions (related Festivals, Farm-to-Table events/showcases such as Cultivate, Feast of Fields).

7. Invest in Sport Tourism (Objective #1 – Destination Marketing + Objective #2 – Visitor Servicing) - establish Sport Tourism Advisory Committee and work together to support bid identification/bid submission, create and distribute offers to attendees to encourage early arrival/stay longer, see more Abbotsford
  8. Promote and Develop Cycling Experiences (Objective #1 – Destination Marketing + Objective #3 – Destination Development) in Abbotsford including road biking, mountain biking – attract third party produced events; promote farm cycle tours
  9. Promote Abbotsford for all aviation related activities (Objective #1 – Destination Marketing + Objective #2 – Visitor Servicing + Objective #3 – Destination Development) – promote use of Abbotsford International Airport stay/fly; promote Air Show multi-night packages; invest in direct sales effort to secure aviation related meetings, training, industry events
  10. Promote Signature Festivals & Events (Objective #1 – Destination Marketing + Objective #2 – Visitor Servicing + Objective #3 – Destination Development)- Air Show, Tulip Festival, Run for Water, HopFest, various TRADEX consumer shows; investigate additional third party produced events (e.g. BC Bike Race); provide advice/guidance to event producers and create festival extensions throughout Abbotsford in partnership with others (Chamber, Downtown BIA, etc.). Note: Existing promotions include Passport to Christmas, 107 Days of Summer)
  11. Invest in Enhancing the Visitor Experience in Abbotsford (Objective #2 – Visitor Servicing + Objective #3 – Destination Development)- assess the experiential quality of various experiences, facilitate service training education, on-line reputation management, client model for one-on-one advice to tourism operators
  12. Provide Visitor Services (Objective #2 – Visitor Servicing + Objective #3 – Destination Development)- review physical Visitor Centre operation and staffing, enhance mobile visitor services at key events,; investigate repurposing of facility to Abbotsford Showcase similar to Penticton Wine Store model)
  13. Contribute to Destination Management (Objective #3 – Destination Development)- provide a visitor perspective to Abbotsford planning and decision-making (City planning, Chamber of Commerce membership dialogue, primary research on quality of current visitor experience/areas for improvement); support the development of new visitor experiences such as Aboriginal cultural experiences, cycling experiences etc.
  14. Provide leadership to the tourism industry (Objective #3 – Destination Development) - facilitate regular stakeholder collaboration and information including determining and sharing value of tourism with local community
- To provide some focus and guidance for the first year, a preliminary budgeting exercise was conducted (see next page). The following budget does not represent the entire Tourism Abbotsford budget, just those items related to the strategies and tactics identified in the plan.



Strategy Area	Year 1
Primary Market Research (1)	\$30,000
Branding Review	\$20,000
Leverage Existing Traffic/Visitors (2)	
Invest in Traditional and Social Media (content creation/curation) (3)	\$25,000
Create and promote multi-night themed packages	
Invest in Agri-tourism promotion and product extensions (4)	\$40,000
Invest in Sport Tourism (5)	\$50,000
Promote and develop cycling experiences (6)	
Promote Abbotsford for all aviation related activities	\$10,000
Invest in and promote signature festivals and events (7)	\$15,000
Invest in enhancing the visitor experience in Abbotsford (8)	DBC Remarkable Experiences pilot for Fraser Valley \$21,600
Provide visitor services (9)	\$100,000 + grants + volunteers
Contribute to destination development and management	Staff time
Provide leadership and facilitate regular stakeholder collaboration and information sharing (10)	\$15,000
Staff salaries/administration	\$295,500
Total budget	\$600,500

1. A significant investment in primary market research is considered necessary in Year 1 to inform all future marketing investments. Subsequent to Year 1, intercept research would be designed (Year 2) and activated each year to gauge trends in Abbotsford's Net Promoter Score.
2. Leveraging existing traffic and visitors was considered a high priority strategic direction, however the resources to do so have been identified in the following areas:
3. Invest in Traditional and Social Media
4. Invest in Agri-tourism promotion and product extensions
5. Invest in and promote signature festivals and events
6. Provide visitor services
7. Cooperative marketing partnerships are incremental to this budget allocation – should include approach to airline partners
8. Includes \$30,000 allocation to Fraser Valley Cooperative initiatives and \$10,000 for App development related to farm tours
9. Sport tourism investments should consider updating the Abbotsford inventory of facilities; detailed consideration of strengths/gaps to inform bid pursuit; bid preparation support; promotion/packages for participants;
10. Deleted from strategic directions
11. It is anticipated that this investment in signature festivals and events will grow each year over the five year period of this plan
12. The Fraser Valley was selected as a location for continuing pilots by Destination BC in which they work with tourism operators to assist them in creating remarkable experiences – lessons from this pilot can be taken by Tourism Abbotsford in future years and applied more widely across the entire tourism stakeholder base – budget allocations are made in Years 2 – 5 to support this activity.
13. Increase mobile visitor servicing throughout the year at key events, locations, performances; Visitor Centre location open during spring to fall only
14. Host Abbotsford training/Value of Tourism model

# APPENDICES



# APPENDIX A – MARKET RESEARCH HIGHLIGHTS

## Macro Environment

- Tourism is an international industry
- British Columbia's product offerings are in demand but the Province is a relatively small player in the growing, highly competitive international environment
- In the short term, tourism performance can be volatile as it is highly tied to uncontrollable events, such as weather conditions or rapid changes in security and economic events
- In the long term, healthy growth is forecasted – UNWTO forecasts global growth in international tourist arrivals annually until 2030<sup>13</sup>

## Consumer & Travel Trends

- Fluctuating world economy continues to create uncertainty resulting in continued lower levels of consumer confidence/outlook and impact on discretionary spending; some signs of increasing consumer confidence arising from positive outlook for US economy
- Declining fuel prices increase the affordability of drive vacations and support the potential for increasing travel from the drive markets such as BC, AB and the United States
- Recent declines in the value of the Canadian dollar increase the attractiveness of Canada to US travellers and support Canadian travellers vacationing at home
- All things considered, travel interest is on the rise

## BC Tourism Trends

- 2016 Tourism Indicators (to August 2016) indicate that:
  - International overnight visitation increased 11.5% over the previous year
  - US overnight visitation increased 10.5% ; Asia Pacific overnight visitation increased 12.7% and Europe increased 12.5%
  - Year to date (August) occupancy provincially reached 70% with peaks near 85% in July and August
  - Provincial average daily room rate January – August was \$166/night with peaks nearing \$200/night in July and August
  - Abbotsford/Chilliwack ytd occupancy was 60.4% with July/August peaks of 77-78% (Langley/Surrey ytd was 71%) Note: Abbotsford's inventory of hotel rooms increased by 147 rooms in 2016 with the opening of

Sandman Abbotsford Airport property

- Abbotsford/Chilliwack average daily room rate ytd was \$105 (Langley/Surrey ytd was \$116)
- 2014 Value of Tourism Snapshot reports that the tourism industry generated \$14.6 billion in revenue, a 5.1% increase over 2013 and a 37.7% increase over 2004
- In 2012, there were 17.9 million overnight visitors in British Columbia, an increase of 1.1% over 2011, who spent \$8.6 billion, a decline of 2.2% from 2011
- Over half of the visitors (58.5%) were British Columbia residents
- Visitors from other parts of Canada accounted for 17.6% of all visits
- International visitors accounted for the remaining 23.9% of visitor volume (US 16.4%; Asia/Pacific 4.0%; Europe 2.8%)
- British Columbia has been experiencing steady, reliable growth from BC residents and from the rest of Canada with more volatility in other markets
- The greatest proportion of overall visitor spending is from BC residents (37.7%); the rest of Canada represents 23.9% of expenditures; while US resident spending represents 17.9%; Asia/Pacific 10.5%; Europe 7.9%
- While BC residents spend less per visit, they still represent an attractive target market because they:
  - Experience less volatile travel patterns
  - Travel year-round
  - Accept varying qualities of facilities
  - Are willing to explore the Province

## Vancouver Coast & Mountains – Regional Profile (2014)<sup>14</sup>

**In 2012, overnight tourism in British Columbia generated 17.9 million person-visits and \$8.6 billion in related spending. The Vancouver Coast & Mountains tourism region represents 43% of provincial overnight visitation and 57% of related spending.**

The Vancouver Coast & Mountains tourism region received approximately 8.2 million overnight person-visits in 2012 and generated over \$4.7 billion in related spending. British Columbia residents make up the largest share of overnight visitation (45%) and spending (22%). The second largest market is Washington State (10% of visitation and 6% of spending) followed by Alberta with 6% of visita-

<sup>13</sup> Tourism Towards 2030, World Tourism Organization UNWTO, 2011

<sup>14</sup> Destination BC – Vancouver Coast & Mountains Regional Profile, 2014

tion and 6% of spending. Combined, these three markets represent 61% of visitation and 34% of spending. Domestic overnight travellers accounted for 60% of visitation and 43% of related spending. International travellers accounted for 40% and 57% respectively. The top five markets by area of origin for the region are:

	<b>Area of Origin</b>	<b>Share of Visitation</b>	<b>Share of Spending</b>
1	British Columbia	45%	22%
2	Washington	10%	6%
3	Alberta	6%	6%
4	Ontario	5%	9%
5	California	4%	9%

On average, domestic travel parties to the Vancouver Coast & Mountains tourism region stayed 3.4 nights and spent \$155 per night during their trip. US travel parties stayed 3.6 nights and spent

\$236 per night during their trip, and other international travel parties (excluding the US) stayed 13.6 nights and spent \$126 per night during their trip in the region.

Same day travellers accounted for 49% of visitor volume and 16% of visitor expenditures – overnight visitors accounted for 51% of visitor volume and 84% of visitor expenditures.

Most people travelled in the Vancouver Coast & Mountains tourism region during the peak summer months of July to September but the proportions were more evenly distributed in all quarters for all markets of origin compared to other tourism regions. More travellers visited during the ski season months of October to December and January to March compared to other tourism regions in the province.

Top five trip activities of visitors to the Vancouver Coast & Mountains tourism region often include a range of outdoor activities as well as museums, art galleries and historic sites. Note: these activities could have taken place anywhere on their trip, not just in Vancouver Coast & Mountains region.

#### Top 5 trip activities:

	<b>BC residents</b>	<b>Other Canadians</b>	<b>US residents</b>	<b>Other international</b>
1	National, provincial or nature park			
2	Camping	Beach	Historic Site	Zoo or aquarium
3	Boating/ canoeing/ kayaking	Hiking or backpacking	Zoo or aquarium	Museum or art gallery
4	Beach	Museum or art gallery	Museum or art gallery	Historic site
5	Fishing	Historic site	Downhill skiing or snowboarding	Festival or fair

# Visitor Characteristics – By Market

Destination BC provides market research related to visitor characteristics by their area of origin as well as by the activities in which travellers participate. Detailed reports are available on <http://www.destinationbc.ca/Research.aspx> and summary highlights are provided below: (the following highlights are great, but should we out in Appendix)

## 4.6.1 British Columbia Residents

- British Columbians took 10.6 million overnight trips within BC in 2014
- All age groups are represented – 37% are aged 18-34 years; 36% are aged 35-54 years
- 42% were travelling for leisure; 44% were travelling to visit friends/family
- Average travel party size of 2.7 people
- Average trip length 2.8 nights; 64% staying 1-2 nights; 28% staying 3-5 nights
- 84% travel by auto/camper/RV
- 41% visit Vancouver Coast & Mountains; 24% visit Vancouver Island; 20% visit Thompson Okanagan regions
- Travel throughout the year with peaks in July/August/September
- Beaches, hiking, visiting friends/family and camping are most popular activities
- 26% do not need accommodation; 38% book their accommodation directly
- Explorer Quotient Traveller Type: 36% are Gentle Explorers; 17% are Free Spirits; 16% are Authentic Experiencers; 10% are Cultural Explorers

## 4.6.2 Albertan Travellers

- Alberta travellers took 2.5 million overnight trips to BC in 2014
- All age groups represented; 39% are aged 18-34 years; 40% are aged 35-54 years
- 55% were travelling for leisure; 35% were travelling to visit friends/family
- Average travel party size of 3.1 people
- Average trip length 4.4 nights; 36% staying 1-2 nights; 40% staying 3-5 nights
- 75% travel by auto/camper/RV; 22% travel by air
- 36% visit Kootenay Rockies; 27% visit Thompson Okanagan; 21% visit Vancouver Coast & Mountains; 7% visit Vancouver Island
- Travel throughout the year with peak travel in July/August (42%)
- 26% do not need accommodation; 38% book their accommodation directly
- Hiking, beaches, visiting parks and boating are most popular activities

- Explorer Quotient Traveller Type: 38% are Gentle Explorers; 21% are Free Spirits; 13% are Authentic Experiencers; 12% are Cultural Explorers

## 4.6.3 Ontario Travellers

- **Ontario** travellers took 587,000 overnight trips to BC in 2014
- All age groups are represented; 33% are aged 18-34 years; 33% are aged 35-54 years; 34% are 55 and older
- 43% were travelling for leisure; 26% were visiting friends/family; 29% were travelling for business
- Average travel party size of 2.9 people
- Average trip length of 7.0 nights; 38% staying 3-5 nights; 26% staying 6-9 nights; 15% staying 10-16 nights
- 82% travel by air
- 69% visit Vancouver, Coast & Mountains; 15% visit Vancouver Island
- Travel throughout the year (39% in Nov/Dec/Jan/Feb/March; 44% in June/July/Aug/Sept)
- 26% do not need accommodation; 38% book accommodation directly
- Visiting parks, hiking, going to the beach and visiting friends/family are the most popular activities
- Explorer Quotient Traveller Type: 31% are Gentle Explorers; 27% are Free Spirits; 17% are Authentic Experiencers; 11% are Cultural Explorers

## 4.6.4 Washington State Travellers

- Washington State travellers took 1.2 million overnight trips to BC in 2014
- 62% of travellers are aged 45 years or older; 45% are aged 55+ years; 23% are 65+ years
- 63% were travelling for leisure; 24% were visiting friends/relatives
- Average travel party size of 3.0 people
- Average trip length of 3.0 nights – 76% stay 1-3 nights
- 83% travel by auto
- 75% visit Vancouver, Coast & Mountains; 20% visit Vancouver Island
- Travel throughout the year with small peaks in July/August
- 16% do not need accommodation; 38% book accommodation directly; 21% use an Online Travel Agency; 19% still use a travel agent

- Shopping, sightseeing, visiting friends/family, outdoor activities are the most popular activities
- Explorer Quotient Traveller Type: 34% are Gentle Explorers; 18% are Authentic Experiencers; 15% are Free Spirits; 10% are Cultural Explorers

#### 4.6.5 California

- California travellers made 419,000 overnight trips to BC in 2014
- 62% of travellers are 45 years or older; 42% are 55 years or older; 20% are 65+years
- 57% are travelling for leisure; 23% are visiting friends/relatives; 13% are travelling for business
- Average travel party size is 2.5 people
- Average trip length is 5.7 nights; 47% stay 1-3 nights; 34% stay 4-6 nights
- 81% visit Vancouver, Coast & Mountains; 30% visit Vancouver Island;
- Travel peaks in June and July; followed by August/September/October
- 56% arrive by plane; 24% arrive by auto; 10% arrive by boat
- 23% of travellers book their air directly; 19% book air through a travel agent; 16% use an online travel agency (OTA)
- 16% of travellers from California do not need accommodation; 38% book their accommodation directly; 21% book accommodations through an OTA and 19% book accommodation through a travel agent
- Sightseeing, shopping, visiting friends/family and visiting parks are the most popular activities
- Explorer Quotient Traveller Type: 29% are Free Spirits; 28% are Gentle Explorers; 19% are Authentic Experiencers; 12% are Cultural Explorers

#### 4.6.6 United Kingdom

- United Kingdom travellers took 192,000 overnight trips to BC in 2014
- 64% of travellers are aged 45 years or older; 46% are aged 55+ years; 25% are 65+years
- 56% are travelling for leisure; 32% are visiting friends/relatives
- Average travel party size of 2.3 people
- Average trip length of 12.5 nights; 37% stay 7-13 nights; 21% stay 4-6 nights; 17% stay 1-3 nights; 13% stay 14-20 nights
- 77% visit Vancouver, Coast & Mountains; 39% visit Vancouver Island; 29% visit Thompson Okanagan
- Travel peaks in July/August with a smaller peak in February (likely ski related); some travel still occurs in April/May/June

- 46% book their flight directly; 26% use a travel agent for flights; 22% use an online travel agency (OTA)
- 23% do not need accommodation; 30% book their accommodation directly; 26% use a travel agent; 17% use an OTA
- Sightseeing, shopping, visiting parks, visiting friends/family are most popular activities
- Explorer Quotient Traveller Type: 24% Gentle Explorers; 16% Authentic Experiencers; 13% Free Spirits; 10% Cultural Explorers; 10% Cultural History Buffs

#### 4.6.7 Germany

- German travellers took 82,000 overnight trips to BC in 2014
- 38% of travellers were 20-34 years old; 63% were 44 years or younger
- 66% are travelling for leisure; 17% are visiting friends/relatives
- Average travel party size of 2.1 people
- Average trip length is 14.9 nights; 32% stay 7-13 nights; 21% stay 4-6 nights; 19% stay 14-20 nights
- 83% visit Vancouver, Coast & Mountains; 43% visit Vancouver Island; 43% visit Thompson Okanagan; 25% visit Kootenay Rockies and 16% visit Northern BC
- Strong travel peaks in July and August
- 39% book their flights through a travel agent; 28% book flights directly and 27% use an online travel agency (OTA)
- 13% do not need accommodation; 39% book accommodation through a travel agent; 18% book accommodation directly; 23% use an OTA
- Sightseeing, shopping, visiting parks, outdoor activities and visiting historic sites are most popular activities
- Explorer Quotient Traveller Type: 17% Cultural Explorers; 15% Virtual Travellers; 14% Rejuvenators; 13% Authentic Experiencers; 13% Group Tourists

## Visitor Characteristics – By Activity

Destination BC also provides market research on visitor characteristics defined by the activities they participate in while travelling. Detailed reports are available on <http://www.destinationbc.ca/Research.aspx> and summary highlights of the most relevant activities for Abbotsford are provided below:

### Hiking (2009)

- Canadian day hikers skew female; Canadian overnight backpackers skew male
- American hikers – both day and overnight skew male
- Majority are aged 18-34; American hikers have larger number of older participants aged 45 years+
- Well educated; moderate to affluent income
- Hiking travellers also enjoy visiting natural wonders, swimming in lakes (Canadians) and visiting heritage sites/museums (Americans)

### Cycling and Mountain Biking (2009)

- Male skew to those participating in cycling activities, particularly from US (63% male); Canadian 55% male
- 40% of Canadian cyclists are aged 18-34; US participants older with the largest group aged 45-54 (30%)
- Canadian travellers motivated by mountain biking skew younger and male with 42.8% aged 18-34 years and 74.5% male. They are affluent and educated with 46.6% having household incomes of \$100,000 or more and 64.2% having completed post secondary education
- US travellers motivated by mountain biking are 73.8% male;
- Majority (48.3%) of motivated US mountain bikers are aged 18-34 years; like their Canadian counterparts, they are affluent and well educated with 32.7% having household incomes of \$100,000 or more and 59% having completed post secondary education
- US overnight touring cyclists are skewed male as well – 82% of those travellers motivated by overnight touring are male
- Canadian and US cycling travellers can be considered frequent travellers when compared to the overall travelling population
- Cycling travellers also enjoy swimming in lakes, strolling the city/seeing buildings, visiting parks, natural wonders, sitting on a beach/sunbathing, visiting historic sites. Many travellers who participate in cycling also enjoy hiking.

### Touring (2014)

- Approximately one-third of Canadian touring travellers are aged 18-34 years; US touring travellers tend to be older with approximately 25% over the age of 65 years;
- Approximately one quarter of both Canadian and US

touring travellers are in adult-only households

- American travellers more likely to take guided tours than Canadian travellers
- Touring travellers are also interested in city strolls, visiting national/provincial parks, historic sites, natural wonders

### Heritage (2009)

- Canadian heritage travellers tend to be younger than their US counterparts – 31% of participating Canadians are aged 18-34 years; largest group of participating Americans is over 65 years of age (25%)
- 32% of US travellers motivated by heritage are over age 65; only 15% of motivated Canadian heritage travellers are in this same age group
- Motivated American heritage travellers are relatively affluent when compared to the overall population of travellers to BC and are on average more affluent than motivated Canadian heritage travellers
- Heritage travellers also enjoy city strolls, visiting national/provincial parks, sunbathing/sitting on a beach, visiting well-known natural wonders

### Fishing (2009)

- Predominately male; 18-34 and 45-54 years of age
- Reasonably affluent, educated and majority come from adult-only households
- Fresh water fishing dominates Canadian market (BC residents have a higher salt water fishing rate)
- Other activities – swimming, motor boating
- Show some interest in 'natural wonders', visiting national/provincial parks

### Golf (2009)

- Two thirds of golf pleasure travellers from both Canada and the US who had been to BC in 2004/05 and participated in a golf activity were male – this male skew is even more pronounced amongst those motivated to travel for a golf activity
- Canadian travellers who had participated in a golf activity while on a trip were younger than their American counterparts. Nearly 49% of Canadian participating golf travellers were aged between 18 and 44 years compared to 38% of Americans

- Participating golf travellers tend to be high-income earners with over 43% of Canadians and over 50% of US travellers earning \$100,000 or more per annum. The proportion is even high for those motivated to travel by golf activities
- The majority of golf travellers are well educated
- Canadian travellers motivated by golf tend to be older than the general population of Canadian travellers to BC with 37% aged 55 years or older
- Other popular activities in addition to golf include sunbathing/sitting on a beach; swimming in lakes; strolling to see city buildings; visiting a nature park; visiting historic sites/buildings; and swimming in oceans
- Hiking skiing and fishing were the most common complementary sports-related outdoor activities of interest to golfers
- Impact factors for US golfers when choosing a destination include: quality of golf course; value for money; availability of multiple courses and weather conditions.

## Outdoor Adventure (2014)

- In 2005, over 1.2 million people participated in British Columbia commercial outdoor adventure tourism, an increase of 24% from 2001
- US visitors (35%) and BC residents (29%) are the heaviest participants in outdoor adventure tourism in BC
- The most popular outdoor adventure activities for Canadians are day hiking (18%), road biking (16%) and car camping (12%)
- Approximately two-thirds of Canadians enjoy being in the wilderness, however a large portion has fears about remoteness
- British Columbia's outdoor adventure travellers are younger than other travellers, with an average in the mid-30s. The majority are male and single / never married.
- Generally, BC males are significantly more likely to participate in road biking, camping, freshwater fishing and mountain biking whereas women are more likely to participate in soft outdoor adventure activities including beach activities, nature viewing/ scenic photography, bird watching and whale watching
- US residents who are outdoor enthusiasts are slightly more likely (55%) to be male, almost half (49%) are married, and 38% have a post-graduate degree/diploma

## Aboriginal Cultural Tourism (various dates)

- In 2010, 3.7 million overnight visits to BC included an Aboriginal cultural experience – almost double the number from 2006
- Approximately half of these visits are by Canadians

- Average Aboriginal cultural tourism visitor to BC tends to be female, middle to late aged, well-educated and earns an upper-middle income
- Aboriginal cultural tourism visitors under the age of 50 prefer active experiences such as canoeing, kayaking, dog-sledding and horseback riding while visitors aged 50+ prefer less vigorous experiences such as hiking, walks, nature observation and indoor activities
- Area of Origin:
  - British Columbia residents
  - Canada – Alberta, Ontario
  - US - Washington, Oregon, California
  - Europe – United Kingdom, Germany, Switzerland, Netherlands
- Demographic:
  - Aged 35 – 64 primarily traveling without children although a sub-segment are traveling with children
  - Educated with university degree
  - Middle to upper income
- Travel Behaviour:
  - Visiting friends/family
  - Touring vacations (self-drive private vehicles/RV's)
  - Relatively long stay in BC with many having flexibility to change trip plans and stay 1-2 more days in the region
  - Many Aboriginal tourism experiences are not planned in advance of arrival
- Travel Interests:
  - Aboriginal museums and art galleries, performing arts/ events/ ceremonies, authentic facilities, interacting with local people, learning about the traditional use of the land, and hearing Aboriginal legends, experiencing Aboriginal cuisine
  - Other historic sites and buildings, museums
  - Natural wonders, parks, outdoor experiences including hiking, fresh water fishing, canoeing, kayaking, water based or wilderness lodges
  - The 'dual track' visitor identified in the Blueprint Strategy is interested in outdoor and soft adventure experiences that incorporate cultural interpretation as an enhancement to the experience. While some travelers are primarily interested in Aboriginal culture, a much larger market can be captured by enhancing mainstream tourism experiences (hiking, kayaking, horseback riding etc.) with an Aboriginal cultural element<sup>15</sup>

<sup>15</sup> Aboriginal Cultural Tourism Blueprint Strategy for British Columbia, November 2005 prepared by Aboriginal Tourism Association of British Columbia

## Festival Tourism Enthusiasts

- Educated with moderate income levels
- Want to experience
  - Stroll through the city
  - See historic sites and buildings
  - Farmers markets/country fairs
  - Visit parks

## Wine Tourism (2009)

- Approx. half of wine tourism travellers from both Canada and the US who had been to BC and participated in a wine tourism activity were male; of travellers motivated by wine tourism activities, 60% were male
- All age groups participate in wine tourism activities and are motivated by wine tourism activities – more than one third were aged 55 years or older and US wine travellers were more likely to be older than their Canadian counterparts
- Wine tourism travellers tend to be higher income earners with at least 40% of Canadian and American wine travellers earning annual household incomes greater than \$100,000
- Pleasure travellers motivated to travel by wine-related

activities are well educated with 59% of Canadians and 72% of Americans having completed post secondary education

- Other activities that wine travellers enjoy include strolling to see city buildings and historic sites/buildings and well-known natural wonders. Sunbathing/sitting on a beach and swimming in lakes and oceans were the most popular outdoor activities for wine travellers
- Hiking, golfing and downhill skiing were the most common complementary sports-related outdoors activities of interest to wine travellers – however, these activities had considerably lower incidence rates in comparison to other more general outdoor and/or culture related activities
- US motivated wine travellers show particularly strong interest in cultural activities such as: museums – history/heritage; art galleries; farmers' markets/country fairs; botanical gardens and live theatre
- International visitors who travel to wineries have a higher interest than other visitors in cultural attractions (museums, art galleries, wine festivals – particularly those reflecting local customs and heritage)
- Proportionately more winery visitors also go to national parks and botanical or other public gardens than do other visitors