

Pacific Rim Education Tourism Market Research and Strategy Development Final Report

Submitted to WAMA and the Pacific Rim Knowledge Project Steering Committee:
Tla-o-qui-aht First Nation, District of Tofino, District of Ucluelet and Yuułuʔiłʔatḥ

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Executive Summary

This market research and development strategy for education tourism was initiated in mid August, 2014. Education tourism, a relatively new segment of ‘special interest tourism’, attracts visitors who are either interested in learning while they travel, or are purposely traveling for a specific learning experience. In August 2014 we asked this question – “Which type of visitor should we focus on for our region?” We were directed by the Steering Committee to target those visitors to the Pacific Rim who deem education to be the main component of their travel. The purpose of this report is to provide a step-by-step approach to a Pacific Rim market strategy in education tourism from an “education-first” viewpoint.

The market strategy document comprises several key components or chapters. They include:

1. Regional Asset Inventory (prepared by separate contractor)
2. Review of Literature in Educational Trends and Opportunities
3. Scan of Community documents, from an Educational perspective
4. Development of Market Segment Criteria
5. Defining Four Key Market Segments
6. Four Market Segment specific positioning statements
7. Regional positioning statement and rationale
8. Competitive market differentiation strategies
9. Market Development Recommendations
10. Ten Community Recommendations

The four key market segments in chronological order are:

1. High school Outdoor Education (13-18)
2. University Field Studies (18-30)
3. Adult Learners (30+)
4. Elderhostel (50+)

Recommendations: Market Development and Community

The following table outlines several recommendations for moving forward in the categories of product content, coordination and service provision.

Summary Table: Market Development Recommendations

Categories	High School Outdoor Education	University Field School	Adult Learning	Elder Hostel
Product Content	Pre-package BC curriculum-justified 'mix' of learning activities	Link with organizations that provide hands-on learning from local knowledge keepers; Provide culturally safe knowledge sharing with First Nations;	Pre-package 'mix' of learning activities that contribute to healthy lifestyle (leisure & education combined); Develop partnerships with University Certificate programs in areas of local adult learning priorities.	All inclusive package of meals, accomm. & activities Local stories, local experts, local experience Mix of learning and walking (Healthy Lifestyle)
Coordination	Coordinate local hands-on outdoor learning within a diversity of communities; Coordinate programing with local organizations that links community co-learning with cultural sharing and hospitality; Coordinate activities between communities	Coordinate stewardship-based research & service projects with local environmental education organizations;	Coordinate program relevant activities with local organizations in different communities; Coordinate the local learning needs with an attractive learning itinerary for visiting learners	Coordinate appropriate programing with local organizations Coordinate activities between communities
Service Provision	Access to a cluster of accommodation, kitchen facilities and class room space in several west coast communities;	Access to a cluster of accommodation, kitchen facilities and class room space in several	Access to comfortable accommodation and high quality food catering services in each	

		west coast communities;	community (community tour 'trip pattern');	
Transportation	Access to transportation links between communities;	Access to transportation links between communities;	Access to transportation links between communities;	Access to comfortable mid-cost accomm., affordable restaurant meals
Training and HR			Access to additional job training funds, scholarships and or bursary monies to offset program costs	

There are ten main recommendations from the research for the communities to advance the learning economy on the west coast of Vancouver Island:

1. One central regional organization, with education, research, and FN culture in their mandate, to perform a coordinating role between the four communities.
2. More clustering and coordination of services (accommodation, kitchen, meeting space) will enhance the market segments of High School Outdoor Education and University Field Studies.
3. A marketing plan that encompasses a central hub, with four participating communities (hub and spoke model).
4. A system of transportation links between communities, including water and land transportation.
5. The primary focus for delivery of educational tourism will be the months from October to May.
6. A website that promotes, brands, and offers packages in the four market segments, in the four locations of the network; and exemplifies community and economic reciprocity.
7. Experiential, place-based learning is essential to success.
8. Surfing, First Nations History and Culture, are key attractors to the region.

9. Collaborative Branding with successful existing branding in UNESCO and local DMO's.
10. Elderhostel is a new and emerging market.

The Report explains the market segments and positioning statements in greater detail, and the iterative process undertaken between August and December 2014. A marketing plan for each segment would be the logical next step, involving further research, community input and development.

Project Background

The purpose of the Pacific Rim Educational Tourism Market Research and Development Strategy is to provide a strong foundation of research and analysis to advance the creation of a knowledge economy for the Tla-o-qui-aht First Nations, District of Tofino, District of Ucluelet and Yuułuʔiłʔatḥ government. The main objectives of this work are as follows:

- To identify, test and refine collective and individual education tourism strategies based on:
 - a. the asset inventory, and;
 - b. understanding the needs, interests and parameters of local service providers and educational institutions, researchers, businesses, learners and tourists.
- To work closely with the project Steering Committee throughout the project cycle using an iterative action research approach to guide both the direction and scope of research.

The results of this work are intended for the audience of the Steering Committee, the four communities that took part, and the key organizations currently conducting education tourism within our west coast communities.

1. Research Methods

We employed an action research methodology designed to engage community input and guide a reliable and valid process. This approach was used for three iterative cycles of study, action, analysis and group reflection with the project Steering Committee (see Appendix A for list of contacts). The research steps within each cycle of action are as follows:

Research Cycle 1:

- Literature Review of Education Tourism Trends & Opportunities
- Community Document Scan for Education Goals & Objectives
 - Reviewed secondary sources, primarily academic journals, for literature review
 - Compiled results in 10 page report and submitted to WCA on August 18, 2014
 - Reviewed over 25 local documents relevant to education tourism goals & objectives
 - Presented findings at Aug. 28th Steering Committee meeting
 - Steering Committee requested project focus more on the education side of the education tourism spectrum, that we deliver one regional report with a regional view of education tourism market objectives and strategies and prioritize local learning needs.

Research Cycle 2:

- On-line Survey for Existing Education Visitors
- Semi-structured survey with key informants in various market segments
- Web-based analysis of competitive markets
 - Over 23 respondents answered the on-line Survey Monkey questionnaire
 - Conducted over 35 semi-structured interviews with key informants from key market sectors and local distribution channels (See Appendix B for list):
 - Researched Competitive Market Objectives and Strategies (on-line web search)
 - Presented results to Steering Committee on Oct. 31, 2014
 - Steering committee requested we select target markets that will result in zero net economic loss while contributing to community benefits, including local learning needs, research needs and distributed economic

benefits throughout the region (see section 7 for market segment selection criteria).

- Interim results report was prepared and submitted Nov. 24, 2014.

Research Cycle 3:

➤ Market Strategy Report

- Analyzed results with selection criteria for target market segments (based on Steering Committee recommendations)
- Analyzed regional asset inventory for supply and demand product matching
- Developed market positioning guiding principles
- Developed market objectives and market strategy for each market segment, based on a regional market strategy approach
- Submitted findings on Dec 1, 2014
- Final Steering Committee meeting Dec. 12, 2014

2. Overview of Tourism in the Region

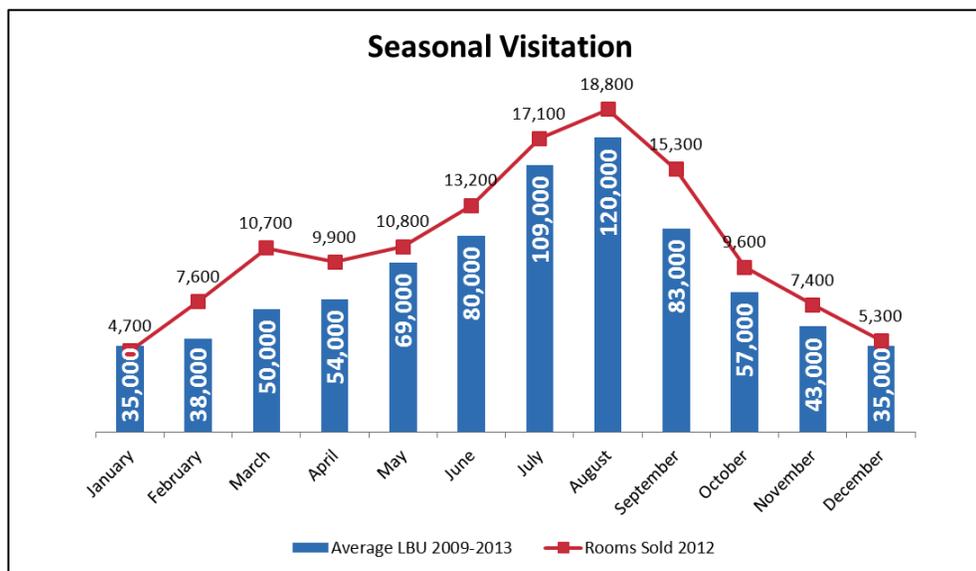
Developing an education market demand strategy for the west coast region requires an understanding of the current cycle of seasonal visitation rates, the peak and trough nature of visitor volumes and the fluctuating pattern of occupancy rates. We describe each aspect of the west coast tourism sector as follows.

Seasonal Visitation

The tourism sector in the west coast region is characterized by fluctuating seasonal demand, driven largely by a combination of holiday seasons and weather patterns.

Figure 1 presents the seasonal visitation rates.

Figure 1: Seasonal Visitation Rates for West Coast Region (Average/year)



(Source: Tofino Tourism Master Plan 2014)

Tourism visitation is busiest in the summer months, July and August. The seasons of Spring (May/ June) and Fall, (September/October) are less busy. The lowest occupancy rates are recorded in November, December, January and February.

Occupancy rates in July and August are at or near capacity. However from October to March, 2012, 70% of total room inventory was unoccupied. The trend is similar for

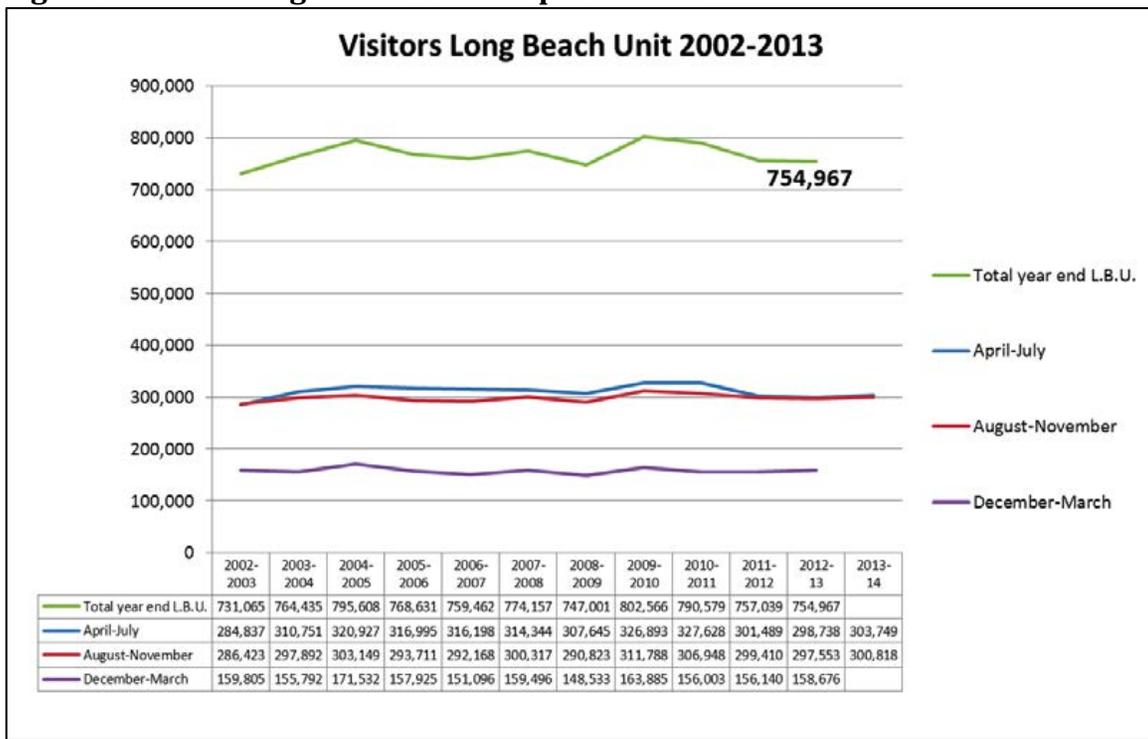
the winter months in all years between 2009-2013 (TMP, 2014, p.18). The Tofino Tourism Master Plan (2014) and other documentation confirm previous research on west coast seasonality (Welk 2008, Dodds 2010, Thicke 2011, Go2,2013, Parks Canada and Tourism Tofino 2014).

This information is significant for several reasons. First, it points to the need to focus education tourism development in the shoulder and off seasons. Most residents strongly support the increase of levels in visitation in the spring/fall and winter months (TMP, 2014, p. 31). Second, weather may need to be taken into account with regard to certain activities, thereby influencing target market focus.

Visitor Volume

We do not have a precisely accurate measure for the number of visitors to the West Coast. However, a fairly good measure is the number of visitors to the Pacific Rim National Park as presented in Figure 2.

Figure 2: Fluctuating Visitor Volume per Season



(Source: Tofino Tourism Master Plan 2014)

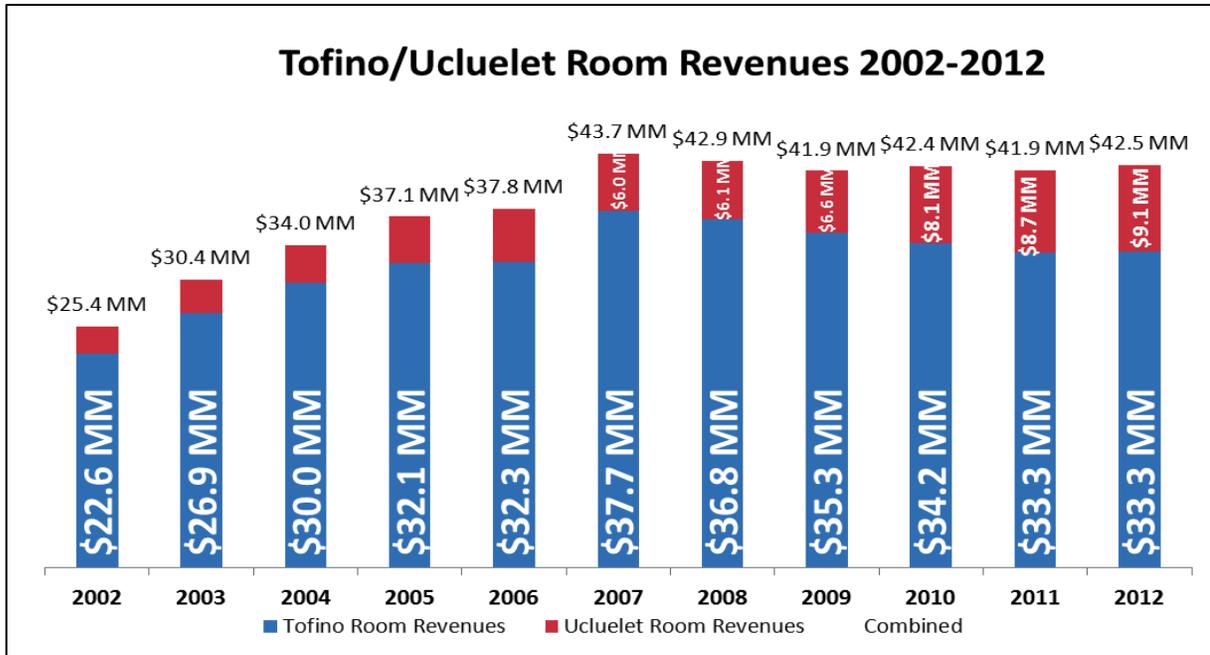
Parks Canada estimates visitors averaging 765,000 annually, with the majority of visits between mid-March to October (TMP, 2014, p.16). Visitation to the Long Beach Unit of Pacific Rim National Park in the summer months, July and August are more than double that of the winter months from December to March. These statistics concur with the occupancy rates above. In addition, visitor numbers have fluctuated over the past 12 years, from a low of 730,000 in 2002-2003, to a high of 802,000 in 2009-2010. Although the region experienced a 6% drop from 2009-10, the past three years have experienced a steady number of visitors in each of the seasons of over 755,000.

The annual measure indicates that tourism has been relatively resilient in comparison to broader British Columbian and Canadian fluctuations in tourism. The decrease from 2009-10 may be owing to a number of factors, from the global economic recession, to the rise in ferry fares. However, it does also support the need of the region to diversify in its product offerings in a manner than supports growth in shoulder and winter seasons. One other conclusion relative to education tourism is that a focus on markets that are more closely situated to the West Coast may assist in insulating annual fluctuations rather than depending on long haul traffic.

Room Revenues

Figure 3 provides room revenues for the Tofino/Ucluelet area. This information is helpful in both product-market matching and in order to consider potential new revenue.

Figure 3: Room Revenues Tofino/Ucluelet



(source: Tofino Tourism Master Plan 2014)

Room revenues in Tofino /Ucluelet increased from 25.4 million in 2002 to 42.5 million in 2012. The room revenues for these 10 years demonstrate that Tofino accounts for 75-80% of the total revenue in the region. However, Ucluelet's proportion of room revenues has risen steadily from 2007-2012 from 15 to 25% of the total room revenues. This illustrates an increasing equity for Ucluelet in room revenue shares. No data is available for the other two First Nation communities.

The total rooms sold in Tofino range from 85,000 to 129,00 per year from 2011 to 2013. Approximately 75% of rooms sold are in the May to October time frame, again confirming the extreme seasonality of the Tofino-Ucluelet region (TMP, 2014, p. 17). The past five years has experienced a steady decline since 2007. Nevertheless, the decline in revenue is not proportional to the decrease in visitor numbers (Fig. 2) leading us to conclude that raising room rates have compensated to a certain extent.

A few observations from this information are relevant in terms of education tourism product development. The fluctuating room numbers not only reflect the need for considerable human resources from May to October, but flexibility to downsize staff

throughout the year. The extreme fluctuation demonstrates the capacity and the four communities' willingness to expand accommodations for the summer season. However, it also indicates the underutilized capacity during the off-season and the pressing need to diversify the scope of the tourism economy in the shoulder and off-seasons.

The data presented above in terms of occupancy rates, visitor volume, and room revenues confirms the trend of seasonality in tourism. The fluctuating room numbers requires considerable human resources from May to October. In addition, the pressures of being a rural and remote region of 4,400 residents providing 129,000 room nights and, grossing 42.5 million in 2012-2013 is quite an impressive statistic (Figure 1, Figure 3, statcan.gc.ca). The opportunity and challenge now is to approximate and harness a similar potential in the months from October to May.

Over the years, tourism has been a resilient economic sector for the west coast. However, the past few years have experienced a decrease in the number of visitors and in room revenues. A range of external factors may have caused this but competition for visitors is one key factor. Certainly one response is to diversify product offerings, such as developing education tourism. Given seasonality and room availability, the October to May period is the obvious time, although factors such as labour force need planning consideration as it may limit certain organizations and accommodation properties from participating.

In the present discussion of education tourism, the winter months from October to May present an available opportunity in mid-cost accommodation. This suits the market segments of Adult Learning and Elderhostel. However, there is little availability for the lower end accommodation required by the High School and University segments (Table 1).

3. Situation Analysis of Education Tourism and Regional Assets

The situation analysis examines education tourism in the broader context as well as regional assets that support this development and delivery of the experience. When taken together within the context of the west coast tourism sector as outlined in Section 3, as well as community needs and expectations, we begin to see the opportunity for education tourism is based upon:

- targeting the right mix of market segments;
- coordinating our supply of local assets in a distributed manner (rotating visitors through communities), and;
- targeting markets with larger visitor volumes during the months of lower visitation and occupancy rates.

The situation analysis consists of three parts: the Review of Literature of Current Trends & Opportunities in Education Tourism, the Scan of Community Documents, and a Review of the Regional Asset Inventory.

3.1 Education Tourism Trends & Opportunities

Education tourism, a relatively new segment of ‘special interest tourism’, attracts tourists who are either interested in learning while they travel, or are purposely traveling for a learning experience. Two previous reports provide a more in depth presentation of this information (see Appendices D and E) with this section serving only as a summary. Our review of literature, from academic, public, non-profit and private sector, identifies a range of trends and issues to consider, most notably the following:

- The profile of the average tourist in Canada is shifting from being a passive receiver of leisure who is getting away from ‘work’, to an **active engaged outdoor adventurer** who is interested in **life long learning**.

- Canada's tourism market has evolved over the years, most notably seeing a decrease in the number of European travelers and an increase in the number of Asian visitors. American visitation has decreased over the years but is recently experiencing a rebound, illustrating the long-term unpredictability of markets. Domestic travel remains strong.
- The average Canadian tourist, between **35 and 64** years of age, seems highly active, is interested in **health and wellbeing**, is seeking **green tourism** and travels to destinations with a dual purpose of visiting friends and family while getting **close to nature**. However there is also a growing number of tourists who travel after the age of 50 and who are **over 65**, a group with more time, flexibility and income to engage in education tourism.
- Owing to a lack of government funding for marketing and increasing global and regional/provincial competitiveness, the number of **sectoral and regional strategic alliances**, involving, public, private, as well as local and provincial levels, is not only growing but critical to success.

When these trends in tourism are coupled with the trends in education such as an increasing demand for life-long learning, the growing desire for **experiential place-based learning**, and the increasing need for **cross-cultural exchange and knowledge sharing**, the communities in the Pacific Rim are well situated to offer education tourism experiences that will meet the growing demand.

3.2 Regional Scan of Community Documents

Twenty-five community documents were scanned for local education goals and objectives to identify the prominent education themes that evolved in the region over the last two decades. While the Official Community Plan in both Ucluelet and Tofino give credence to the importance of education; the Yuułuꞵiꞵatꞵ government gave formal recognition to education as a means of preserving Culture and Language in the Constitution adopted in 2011. The Constitution stems from the Manulth

Treaty signed in 2010. This represents a significant change in responsibility to the Community, giving members the opportunity to define the terms of reference for education from pre-K to Post-Secondary for the Community. From the 25 community documents, six theme areas of desired study emerged:

- Environment Sustainability,
- Ecology,
- Tourism,
- Aquaculture/Marine Studies,
- First Nations Culture and History, and
- Outdoor Education.

These themes were then verified with 23 online survey responses, as outlined in figure 4, and approximately 35 semi-structured interviews (see Interim Results Report, 2014). This conclusion suggests that there is strong alignment between the current education tourism market demand and the study themes that have emerged over the 25 years of thinking about the knowledge economy on the west coast.

Figure 4: Online Responses Indicating Education Interest for Visitors to the West Coast

	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree	Total	Average Rating
Learning about aboriginal culture and language is important for our students.	0.00% 0	0.00% 0	0.00% 0	30.00% 6	70.00% 14	20	4.70
Learning about biodiversity and ecology is important for our students.	0.00% 0	0.00% 0	0.00% 0	15.00% 3	85.00% 17	20	4.85
Learning in an outdoor environment is important for our students.	0.00% 0	0.00% 0	5.00% 1	30.00% 6	65.00% 13	20	4.60
Learning from local people and their local ecological knowledge is important for our students.	0.00% 0	0.00% 0	0.00% 0	20.00% 4	80.00% 16	20	4.80

Our results confirm that there is an existing market demand for each of these study themes, moreover there are at least 30 universities already engaged in research on the west coast and approximately 75 High School groups visiting our communities annually for outdoor education experiences.

3.3 Review of Regional Asset Inventory

The regional asset inventory indicates that the west coast region has a high level of organizational capacity, knowledge assets and infrastructure appropriate for education tourism, particularly in the shoulder seasons of Spring and Fall when the visitor and occupancy rates are lower for the region. Below are two sections examining knowledge assets and infrastructure.

3.3.1 Knowledge Assets

A review of the regional asset inventory indicates that over 24 community organizations within our region have education in their mandate and deliver educational programs. Many of these organizations deliver programs that could be easily adapted to fit BC school curriculum requirements. Results from 8 semi-structured interviews with local education oriented organizations indicate the following capacity needs for education tourism:

- Access to target markets outside the region
- Training programs for local naturalists & education oriented tour-guides
- Selection criteria for local knowledge keepers, i.e. “who qualifies as a local expert?”
- Local coordination to ‘fit’ the right visiting group with the right local organization
- Attract visiting groups who are interested in:
 - long term monitoring and data sharing (based on local monitoring needs and existing program design)
 - providing community services (i.e. support local high school programs & activities)
 - ‘stewardship’ and a long term relationship with our communities

3.3.2 Infrastructure

Different markets require different kinds of support and services. For example, our research indicates that visiting learners in the target markets of High Schools and University Field Schools require a clustering of classroom, kitchen and sleeping facilities. Table 1 illustrates the distribution of these clustered facilities per community.

**Table 1 : Estimated Capacity for Clustered Facilities per Community)
(classroom, kitchen, beds in proximal locations)**

	Estimated Classroom Units with Kitchen facilities Capacity (people)	Estimated Adjacent Accommodation Capacity (people)
Ucluelet	55 (rooms) 415 (Hall) 100 Total: 570	22 80 40 40 Total: 182
Tofino	60 200 300 30 Total: 590	50 100 8 30 100 40 40 100 12 Total: 480
Tla-o-qui-aht First Nations	20 100 12 Total: 132	30 200 Total: 230
Yuulu?i?ath (require transit from beds to meeting space)	400 200 12 Total: 612	60 40 30 Total: 130
Pacific Rim National Park Reserve	60 Total: 60	60 Total: 60

These estimates provide a sense of the available meeting space and accommodation clusters within a given community. However, depending on the design of the education experience, several communities may be involved in supplying meeting spaces and accommodation. The table does point to strengths and limitations in hosting very large groups, but in most cases, the educational groups will probably be small to medium (5 to 50).

In addition to these services, transportation links between communities are also required, including water taxi service and bus transportation. Seasonality may be

an issue here, with bad weather hindering movement of groups. Contingency plans may need to be developed to respond to such a scenario. The Tofino Master Plan and CBT Asset Inventory 2014 provide more information on this topic.

4. Selection criteria for identifying target markets

The project Steering Committee provided several guiding principles with which to evaluate our target markets. For example, during our first meeting we were advised that education tourism has to work first as a learning experience for local learning needs. Similarly, we were advised that the value proposition has to result in a net gain for the community, rather than a loss. When asked specifically about choosing between economic priority and community social benefits, the Steering Committee emphasized that the education target market should yield, at minimum, a ‘break even’ economic return initially, and contribute a benefit of some kind to the community in terms of education and learning (including research). The following Table 2 summarizes our understanding of the selection criteria for identifying target markets.

Table 2: Target Market Selection Criteria

Economic Value	Community Benefits
1. No net loss: the target education tourism market must operate on a cost recovery basis.	1. The transactions between visiting education consumers and local education providers result in some larger return for the community. Knowledge provision for the community, according to their education needs, is a priority.
2. The transactions between service providers and education ‘consumers’ must be equitable and respect the value of local knowledge (provide honorariums to local guest speakers).	2. The production of knowledge in the community is shared with the community in some form (i.e. knowledge symposium, data sharing, newspaper articles, public presentations, reports.)
3. The distribution of education services	3. The distribution of education services

are spread throughout the region through a long and diverse distribution channel for each visiting group.	contributes to long-term partnerships and knowledge sharing within the region.
4. Existing local education organizations are the key providers of education services within the region.	4. The benefits of having more education services in the region are experienced in the local schools and local learning programs (positive feedback loop).

5. Education Tourism Market Segmentation Analysis

The purpose of market segmentation is to narrow the scope of market development and implementation to the specific ‘group’ that best fits with the market product being offered. In simple terms, market segmentation is the ‘task of breaking the total market into segments that share common properties’ (Kotler 1999). The organizations developing education tourism markets on the west coast need to consider the right ‘fit’ between the kinds of education activities the communities want to host and the types of visitors who are interested in participating in these activities. Segmentation enables education tourism organizations to prioritize their marketing efforts on the customer group that offers the greatest potential to realize their economic goals and desired community benefits.

A number of conditions need to be met for dividing the market into specific user groups with a high propensity for being attracted to a specific product. The following list is a summary of prerequisite characteristics for market segmentation:

- The market segment must be a discrete group that is clearly distinguishable from others with specific choice preferences, attitudes, objectives and expectations;
- The market size for the segment must be measureable and differentiated from the larger ‘market’ as a whole;

- The specific value of the market segment must be estimated for assessing the financial value of the potential revenues;
- It must be possible to access the market segment for customized marketing; and
- A segment must have potential to be a continuous flow of visitors with sufficient revenues to help support the costs of marketing to maintain the flow (ETC 2007).

5.1 Market Segmentation Target Groups

Table 3 summarizes the target market segmentation categories that emerged from our research results. Of the eight market segments researched, the following four have the highest potential for successful market segmentation and market development on the west coast (Pacific Rim). The remaining four market segments researched, Surf Schools, Kayak Guide Training, First Nations Language Training and Culinary Tourism, are included as program components of each of the four priority target markets.

First, some information on how Table 3 estimations were presented tabulated is in order. The ‘estimated market size’ for each of these markets is significantly larger than the inventory of assets the region can provide. We therefore think it is more useful to consider the other indicators. For instance, ‘estimated market value’ allows for consideration of the economic return for the size of a given group. This estimation of total revenue to the range of services (accommodation, transportation, knowledge leaders/instructors, food plus 15% coordination) is based on a standard group size staying in low to medium accommodation for a period of five to ten days, based on current trip patterns. The column ‘marketing distribution channels’ indicates key points of contact for developing relations. Finally, ‘level of propensity’ is based on how many groups are already coming to the region as well as the health and wealth of these markets vis-à-vis our competitor analysis.

Table 3: Market Segmentation Target Groups

	Market Segment Group	Estimated Market Size (Geography)	Estimated Market Value /group /trip	Marketing Distribution Channels	Level of Propensity
High School Outdoor Education	Private/Public Schools with Transportation	Vancouver Island	\$37800	Marketing through School District Boards, Surf Schools, Kayaking Schools	High (approx. 75 visiting school currently? visiting/year)
University Field Schools	Environmental Studies, Community Studies, First Nations Culture & Ethnology (Archaeology), Marine Studies	British Columbia, Alberta, Washington, Oregon	\$33750	University Program Heads, Student Calendars, Study Abroad Directories, Canada National Parks, Affiliated Academic Organizations & Research Networks	High (approx. 20 University Field Schools Currently? visiting/year)
Adult Learners	Specific to Local Education Programming /Training needs	Victoria, Vancouver, Seattle	\$42000	University/College Adult Learning calendars (on-line)	Untested
Elder Hostel	Life Long Learning Retirees	Vancouver Island, Vancouver, Seattle	\$38250	Life Long Learning Institutes, Routes to Learning, Road Scholar	High (approx. 5 groups currently? visiting/year)

Market analysis continues below with regard to each segment.

5.1.1 High School Outdoor Education Market Analysis

The following table summarizes the key user group characteristics for the High School outdoor education programs already visiting the west coast. We conducted 15 semi-structured interviews and a number of respondents completed our on-line survey.

Table 4: Adult Learner Destination Criteria, Asset Requirements and Conditions for Expanded Stays

Criteria for Destination	Asset Requirements	Conditions for Expanded Stay
Safety (“a safe wilderness”)	Location (proximal to activities, not in-town)	Distance from Victoria (4-5 hours) “is perfect”
Diversity of recreation and learning opportunities	Kitchen facility, Bed units (30 average), Meeting Space (30 average)	Develop package (“make it easy for us”), travel from community to community
Justifiable to BC curriculum		BC. School Curriculum-justified
First Nations history, language and culture	Internet but not essential	FN- “we want to learn the history, culture, residential schools, and reconciliation”
Affordable	Low cost facilities (camping is fine)	Safe and affordable

The key findings from this table suggest that we already have a good product on the west coast but more can be done to improve this product for extended stays. The following list identifies areas for improved market development:

- Access to a pre-packaged BC curriculum-justified ‘mix’ of learning activities (“one-stop shopping,” “we are busy”)
- Access to local hands-on learning (outdoors) and local knowledge keepers in different communities (“an exotic niche”);
- Well coordinated programming that facilitates multiple opportunities for community co-learning, cultural sharing and hospitality;
- Seamless coordination between activities and community destination

The following table summarizes our best estimate of the potential revenues that could be derived from visiting groups of High School students. The key product partners, activities and average cost per day were determined from a compilation of interview results. These figures are intended to give an approximate value and are highly dependent on the coordination of program delivery and the specific course

being offered. We also added a 15% coordination fee to demonstrate the cost of maintaining coordinated program marketing and delivery.

Table 5: Quantifying High School Outdoor Education Market Value (20 students/ 5 days):

Market Segment	Key product partners	Key activities	Value Proposition	Av. Cost /person /day	Total Regional Value /day
High School Field Trip	Local Accommodation providers	Accomm. & meeting space/kitchen	Outdoor Ed. Credit	\$50	\$1000
	Local Food Suppliers	Local Food	Sourcing local organic food suppliers	\$50	\$1000
	Surf Schools	Surfing		\$79	\$1580
	Kayaking Schools	Kayaking		\$79	\$1580
	Local Experts	FN History, Biosphere, Biology, Ecology	Local Capacity	\$20	\$400
	Board/Kayak Rentals		Equipment	\$50	\$1000
	Alliance of local organizations	Coordination/BC curriculum	15% Coordination fee	\$50	\$1000
Total Cost/day				\$378	\$7560
Total Value/trip				\$1890	\$37800

The following list identifies areas for improved market development:

- Low cost accommodation (camping is fine) with kitchen facilities and classroom space in close proximity;
- Access to a cluster of accommodation, kitchen facilities and class room space in several west coast communities;
- Access to transportation for traveling between communities;
- Extended stay requires BC curriculum related learning activities and learning outcomes.

5.1.2 University Field Schools Market Analysis

Table 6 summarizes the key user group characteristics for the University Field Schools who are already visiting the west coast. We conducted 10 semi-structured interviews and 24 respondents completed our on-line survey.

Table 6: University Field School Destination Criteria, Asset Requirements and Conditions for Expanded Stays

Criteria for Destination	Asset Requirements	Conditions for Expanded Stay
Diverse learning opportunities (intact wilderness, local knowledge, unique marine ecology)	Inexpensive accommodation (under \$50/night)	Access to local education organizations/ hands-on learning from locals
Experiential learning in multiple community settings is a top priority for students	Access to Kitchen	Access to local water taxis/local transportation
Continuity, long-term monitoring, and conducting comparative analysis	Available class room space	First Nation culture is of great interest, would like to know how to respectfully engage and share knowledge
Applied learning, specifically for ecosystem management training	High-speed internet	Would like more connection & collaboration with local organizations engaged in environmental education & ecosystem stewardship
Connection with local people who live and work in the Clayoquot Biosphere Reserve	Connection and collaboration with local education organizations	Access to classroom space, clustered with kitchen facilities and inexpensive accommodation.

Our analysis indicates that there is an opportunity for expanding the duration of stay for existing University Field Schools and therefore generate more revenue and community benefit. The conditions required to achieve this are as follows:

- Access to hands-on learning from local knowledge keepers;
- Available transportation links between west coast communities;
- Culturally safe knowledge sharing with First Nations communities;

- Engaged stewardship with local environmental education organizations;
- Access to classrooms and kitchen facilities in close proximity to inexpensive accommodation

Table 7 summarizes our best estimate of the potential revenues that are generated within the region from visiting University Field Schools. The key product partners, activities and average cost per day were determined from a compilation of interview results. These figures are intended to give an approximate value and are highly dependent on the coordination of program delivery and the estimated student budget for each visiting Field School. We also added a 15% coordination fee to demonstrate the cost of maintaining coordinated program marketing and delivery.
(next page)

Table 7: Quantifying the University Field School Market Value by Duration of Stay (15 learners/10 days)

Market Segment	Key Product Partners	Key Activities	Value Proposition	Av.Cost /day /person	Total Regional Value/day
University Field School	Low cost hostels, camping proximal to kitchen & classroom	Housing, meeting space, kitchen facilities	Central location/ lower price range/ Bus parking	\$30	\$450
	Local Food Suppliers	Self catered meals	Source local organic food through TUCG	\$40	\$600
	Local Experts	FN TEK Biology Local History Aqua-culture Local government Env. Issues	Local Natural & Cultural History	\$40	\$600
	First Nation Outdoor School	FN culture sharing, TEK	Local Natural & Cultural History	\$50	\$750
	Local Aquarium	Marine Species Touch Tanks	Hands on learning	\$10	\$150
	Local Transit providers	Transit between communities	Community immersion, community diversity	\$25	\$375
	Alliance of Local Organizations	Coordination /facilitation	15% Coordination Fee/person /day	\$30	\$450
Total cost/day				\$225	\$3375
Total Regional Value/Trip				\$2250	\$33750

The key findings from this analysis suggest there is an opportunity for coordinating program delivery with local knowledge keepers and local education organizations on the west coast, particularly if accommodation costs are low and a coordination fee is charged on a per visitor basis. Based on our interview results, we estimate that

between \$2000-\$2500/student per trip is an approximate limit to the willingness to pay. The conditions required to achieve this are as follows:

- Access to inexpensive housing, kitchen facilities and low cost classroom space;
- Available low cost transportation links between west coast communities;
- Locally sourced supply of reasonably priced organic food ;
- Coordinated programming with local knowledge keepers and education organizations; and
- Willingness to pay local knowledge keepers (per group) and a coordination fee (per student/per group) to pay for these local knowledge-sharing services.

5.1.3 Adult Learners Market Analysis

The following table summarizes the key user group characteristics for the Adult Learners who might potentially visit the west coast. We conducted four semi-structured interviews with participants who visited a competitive learning adult learning centre and advised us on what they would like to see on the west coast.

Table 8: Adult Learner Destination Criteria, Asset Requirements and Conditions for Expanded Stays

Criteria for Destination	Asset Requirements	Conditions for Expanded Stay
Holistic learning experience (activity ‘mix’ for body, mind, health & wellbeing)	Comfortable accommodation (mid-range cost)	Access to a ‘mix’ of learning activities i.e. yoga, surfing, course instruction
Immersed learning experience in different communities	Catered meals	Access to comfortable mid-cost accommodation
Inter-cultural sharing and co-learning approach	Pre-packaged learning program	Access to transportation between communities (water taxis/bus)
Transformative experience (changing one’s view of self and society)	Meeting spaces located in different communities	Access to accredited instructors and local knowledge keepers
Outdoor learning and active engagement with nature	Well-coordinated and well facilitated learning experience	Well-coordinated ‘packaged’ program itinerary

The key findings from this analysis suggest that there is an opportunity for expanding the duration of stay for potential visiting Adult Learners. The conditions required to achieve this are as follows:

- Access to a pre-packaged 'mix' of learning activities that contribute to healthy lifestyle (leisure & education combined);
- Easy access to local hands-on learning (outdoors) and local knowledge keepers in different communities;
- Comfortable accommodation and high quality food catering services in each community (community tour 'trip pattern');
- Available transportation links between west coast communities;
- Well facilitated learning itinerary and seamless coordination between activities and community destination

The following table summarizes our best estimate of the potential revenues that could be derived from visiting groups of adult learners. The key product partners, activities and average cost per day were determined from a compilation of interview results. These figures are intended to give an approximate value and are highly dependent on the coordination of program delivery and the specific course being offered. We also added a 15% coordination fee to demonstrate the cost of maintaining coordinated program marketing and delivery.

Table 9: Quantifying Adult Learner Market Value (15 learners/ 8 day courses)

Market Segment	Key Product Partners	Key Activities	Value Proposition	Av.Cost /day /person	Total Regional Value/day
Adult Learning	Mid-cost Hotels (with complimentary Breakfast)	Accommodation	Close proximity to meeting spaces/easy accessible for Van pick-up	\$130	\$1950
	Local Food Catering services	Food catering	Local food sources (TUGS sourced food)	\$75	\$1125
	Local Instructors	Surfing, yoga, guided nature walks, sea kayaking, local artist talks, local authors, local researchers, local fishermen, local chefs, local people	Local knowledge sharing, co-learning, stewardship	\$25	\$375
	Visiting Instructor	Matched with local learning priorities	Increase Community knowledge assets	\$50	\$750
	Local transit providers (DoT van, DoU?, Tofino Bus)	Transit between communities	Community immersion, community diversity	\$25	\$375
	Alliance of Local Organizations	Coordination/facilitation	15% Coordination Fee/person/day	\$45	\$675
Total cost/day				\$330 total cost of course/day	\$5250
Total Value /Trip				\$2640 Total cost/person /course	\$42000 Total revenue for course

The key findings from this analysis suggest that the high cost for program delivery might require further fund raising to offset costs with scholarships or bursaries. However, for private high schools on Vancouver Island, cost was not a barrier.

Another opportunity is to target local learning needs and offset the course fee for local participants with other sources of job training funds. Finally, the high cost of program delivery may be more attractive for University certificate programs. Based on our interview results, we estimate that between \$2500-\$3000/ University Adult Learning certificate program is an approximate limit to the willingness to pay. The conditions required to achieve this are as follows:

- Access to comfortable medium cost accommodation, catered food service and comfortable classroom space with high speed internet;
- Available transportation links between west coast communities;
- Access to additional job training funds, scholarships and or bursary monies to offset program costs; and
- Develop partnerships with University Certificate programs in areas of local adult learning priorities.

5.1.4 Elder Hostel Market Analysis

The following table summarizes the key user group characteristics for Elder Hostel life learning education programs already offered on the west coast. We conducted two semi-structured interviews and reviewed the Road Scholar website to better understand this market segment user group.

Table 10: Adult Learner Destination Criteria, Asset Requirements and Conditions for Expanded Stays

Criteria for Destination	Asset Requirements	Conditions for Expanded Stay
Diverse range of interesting activities	Meals are included in the package	Develop a package of local activities and local experts
Daily schedule includes local history, local artists, local story tellers, local naturalists	Accommodation is comfortable but not too expensive	Distance from Victoria (4-5 hours)
Pre-paid all inclusive package with “nothing to worry about when we’re there”	Provide a variety of community hospitality experiences	Travel in seasons with good road conditions
First Nation History and Cultural content in the program/itinerary	Provide transportation	Safe and affordable
Affordable (i.e. for elderly women on pension)	Safety (easy access activities with door to door delivery)	Access to local life style experience “we want the real living experience of the west coast”

The key findings from this table suggest that we already have an attractive destination for Elder Hostel groups on the west coast but more can be done to improve this product for coordinating local programming content. The following list identifies areas for improved market development:

- Access to a pre-packaged ‘mix’ of local learning activities;
- Access to local hands-on learning (outdoors) and local knowledge keepers in different communities;
- Well coordinated programming that facilitates multiple opportunities for community co-learning, cultural sharing and hospitality; and
- Seamless coordination between activities and community destination.

5.1.4 Elder Hostel Quantitative Analysis

The following table summarizes our best estimate of the potential revenues that could be derived from visiting Elder Hostel groups. The key product partners, activities and average cost per day were determined from a compilation of interview

results and a review of the itinerary information for the Road Scholar Elder Hostel west coast Whale Festival tour. These figures are intended to give an approximate value and are highly dependent on the coordination of program delivery. We also added a 15% coordination fee to demonstrate the cost of maintaining coordinated program marketing and delivery.

Table 11: Quantifying Elder Hostel Market Value (25 learners/ 6 days)

Market Segment	Key Product Partners	Key Activities	Value Proposition	Av.Cost /day /person	Total Regional Value/day
Elder Hostel	Low cost hotels (with complimentary Breakfast)	Accommodation	Close proximity to meeting spaces/easy accessible for Van pick-up	\$75	\$1875
	Local Food Catering services	Food catering	Local food sources (TUGS sourced food)	\$75	\$1875
	Local Instructors	Surfing, yoga, guided nature walks, sea kayaking, local artist talks, local authors, local researchers, local fishermen, local chefs, local people	Local knowledge sharing, co-learning, stewardship	\$25	\$625
	Local transit providers (DoT van, DoU?, Tofino Bus)	Transit between communities	Community immersion, community diversity	\$50	\$1250
	Alliance of Local Organizations	Coordination /facilitation	15% Coordination Fee/person/day	\$30	\$750
Total cost/day				\$255	\$6375
Total Value/Trip				\$1530	\$38250

The key findings from this table suggest that we already have an attractive destination for Elder Hostel groups on the west coast but more can be done to

improve this product for coordinating local programming content. The following list identifies areas for improved market development:

- Access to medium cost accommodation, locally catered food and class room space in close proximity;
- Access to inter-community transportation;
- Well-coordinated education programs with local knowledge keepers

6. Positioning Statement Guiding Principles

The market development strategy positioning statement is a short description of the unique value of the product, in this case education tourism experiences, and how it fulfills a consumer need in a way that is distinctly different from competitors. Our findings suggest that the west coast is already an enormously attractive learning destination. The communities are uniquely situated in a spectacular wilderness setting, between the convergence of coastal mountains, temperate rainforest lowlands and large river systems that flow into the Pacific Ocean. These lands are the traditional territories of the Nuu-chah-nulth people, whose cultural values have evolved with the seasonal cycles of the pacific salmon and the migration patterns of the grey whale. The cultural, social and ecological stories that emerge from this edge of the western pacific coastline are complicated, controversial and inspire curiosity. Visiting groups of students, in all age categories, are drawn to the hands-on experience of learning about the cultural and natural history of the west coast in a multitude of ways.

Surfing, ocean kayaking, stand-up paddle boarding, coastal walks, tide-pool exploration, bird watching, beach hiking, stream walking and learning from local knowledge keepers are all elements of the potential ‘package’ of outdoor education programming. Local learning organizations are leaders in creating programs for

environmental education, ecosystem stewardship, marine studies, arts, culture and languages, to name a few. What the west coast communities offer, like no other education destination, is an invitation to co-learn and co-create knowledge while building local learning pathways for transformative leadership, Aboriginal tourism, cultural resilience, business innovation and ecosystem stewardship.

In this section, a set of guiding principles has been developed from our research results to inform the future crafting of specific market positioning statements.

We recommend the market development positioning statements keep in mind the following Guiding Principles:

- **Co-Learning:** (local residents will benefit from learning along with the visitors)
- **Community reciprocity:** (mutual benefit is derived for the community and visiting learners with every education tourism product developed)
- **Local Knowledge Keepers:** (local experts facilitate program delivery as much as possible)
- **Learning Network/Local Organization Alliance:** (local organization programming is well coordinated in a collaborative governance structure)
- **Fostering a sense of stewardship/engaged in an outdoor learning environment:** (programs are delivered outdoors whenever possible with the aim of creating a connection with nature)
- **Holistic Learning** (integrated body-mind leisure & learning that exemplifies health and well-being)
- **Community Immersion Learning** (traveling from community to community to experience local diversity and welcoming hospitality)
- **Fostering Cultural Safety and Sharing:** (Seek understanding of one another's cultural ways of seeing the world, pay respect to and honour the wisdom of these ways that have brought us here today)

7. Differentiating From Competitive Market Objectives & Strategies

To assist in establishing the best competitive position of the education tourism, this section examines the objectives and strategies of key competitors for the four target markets in relation to what is presently occurring on the West Coast. Of course, these are not the only competitors in the market; further analysis of competitors did occur in the study and those findings are taken into account in the findings.

A table for each market segments presents the information

7.1 High School Outdoor Education Comparison: Sea to Sky Outdoor Education

Table 12 outlines the key market characteristics that differentiate High School outdoor education programs visiting the west coast from comparable programs.

Table 12: Competitive analysis related to High School education tourism experience

Sea to Sky Market Objectives (not limited to these)	West Coast Market Objectives (not limited to these)	Sea to Sky Market Strategy	Market Strategy
To offer outdoor experiential education for high schools based on 3 R's: Real, Relevant and Revolutionary	To offer outdoor experiential education for middle and high school students in: FN culture and Reconciliation, Biology, History, Surfing, and Community stewardship.	Target students who are motivated to learn in an active outdoor setting and participate in a team.	Create a unique market mix: FN culture and reconciliation, Surfing, Curriculum based subject areas, Community Stewardship
To provide an active and engaged learning platform that exposes students to the	Supply mid -cost education services to Vancouver Island students in Grades 8-	Supply mid to high cost private education services that provide a life	Experiential, place-based learning, Coordination by local RES and Aquarium, Dormitory,

magnificence of nature and builds a community of learners.	<p>12, coordinated by local non-profit society.</p> <p>-Estimate 20,000 HS students on VI-focus on Private and Public High Schools with Outdoor Education Programs in place.</p> <p>-To increase number of school groups visiting from 75/year in 2014 (2000/year) to 100/year by 2016 (2500/year), in shoulder seasons.</p> <p>-Early relationship building builds long-term potential customers.</p>	long community of peer learners.	kitchen and meeting space –hub facility required, Package learning into 3, 5 and 7 day programs, Central coordinator, Surf lessons and activity add the unique proposition that cannot be replicated elsewhere on VI or Canada., FN Culture and Reconciliation education has scarce availability to HS students on VI , “A safe wilderness”, Variety of Education and recreation opportunities, provide community stewardship opportunities
To educate students using curriculum adapted for outdoor learning.	Create and sustain an ethos of environmental stewardship and respect for FN culture.		Adhere to Guiding Principles, Provide opportunities for community stewardship satisfying BC school curriculum

The market strengths of the west coast destination are as follows:

- Opportunities for co-learning with local education organizations and BC curriculum learning outcomes (see Appendix B for existing curriculum ready programs);
- Unique opportunity to engage in culturally safe knowledge sharing experiences with local First Nations;
- Opportunity to experience a unique mix of outdoor leisure and learning programs; and
- Opportunity to tour different west coast communities and experience place based immersion learning and participate local stewardship initiatives.

7.2 University Field Schools Comparison: Haida Gwaii Higher Education Programs

Table 13 presents a comparison of university field schools as offered in Haida Gwaii in comparison what is currently occurring in West Coast Communities.

Table 13: Competitive analysis of education tourism experience for university field schools

Haida Gwaii Market Objectives (not limited to these)	West Coast Market Objectives	Haida Gwaii Market Strategy	West Coast Market Strategy
To provide an intimate community immersion learning experience in Haida Gwaii culture and ecology that offers University credit courses in locally appropriate areas of study.	To provide a unique opportunity for visiting learners to work with local education organizations and engage in research that contributes both to the learning priorities of local communities as well specific University course learning outcomes.	<ul style="list-style-type: none"> -Target students and professors from existing university programs i.e. environmental studies, forestry management, natural resource management. -Provide local case studies (relevant for program) for core curriculum content. -Provide full course/credit requirement during a University Semester cycle, matching existing program needs and curriculum learning outcomes. -Source & coordinate external funders to subsidize program/course implementation costs. -Small class sizes (max 20) for intimate learning at scale of community capacity 	Target existing visiting learners & University programs that are well matched with the research and education objectives of local education organizations.
To increase the number of economic opportunities for local residents through local service provision i.e. accommodation & food.	To expand & increase the number of economic opportunities for local education organizations and tourism businesses through service provision i.e. expert local knowledge, accommodation & food.	provide local resident homestays for students,	Provide a product matching service for visiting learners, local community education organizations and local tourism service providers.

This table outlines the key market characteristics that differentiate the west coast education tourism experience from comparable programs. The market strengths of the west coast University Field School destination are as follows:

- Opportunities for co-learning with local researchers and long term knowledge sharing for local monitoring needs (as opposed to importing knowledge and exporting knowledge products);
- Easier travel destination provides more flexibility for short stay Field Schools (i.e. 10 days) and therefore easier to source appropriate facilities;
- Opportunity to extend the stay of existing University Field Schools rather than invest in new program delivery partners

7.3 Adult Learners Comparison: Hollyhock Life-Long Learning/Professional Development

Table 14 outlines the key market characteristics that differentiate the Adult Learners visiting the west coast from comparable programs (next page).

Table 14: Competitive analysis of education tourism experience for adult learners

Hollyhock Market Objectives (not limited to these)	West Coast Market Objectives	Hollyhock Market Strategy	West Coast Market Strategy
To offer high quality programs for innovative professional development, cutting edge business thinking and improving lifestyle skills for maximizing individual (& community) health and well being.	To provide high quality programs for local adult learners to develop best practices in cutting edge governance models, enable culturally appropriate business skills and support culturally safe leadership practices.	Target mid-career professionals and adult learners from a range of backgrounds seeking specific professional development and life skills required for healthy lifestyle and well being.	Match local learning needs & values with culturally appropriate University programs aligned with the education objectives of local organizations (emphasizing First Nation learning priorities).
To provide an integral learning experience that hosts visiting participants in a beautiful coastal retreat and healthy lifestyle setting.	To attract visiting learners to offset the costs for local learners to participate in locally delivered education programs.	Supply mid to high cost re-treat like accommodation & food, with a west coast rustic style, in a naturally beautiful setting.	Target adult learners in University programs who desire a culturally diverse and transformative community-based hands-on learning experience in a spectacular west coast setting.
To attract leading edge, high profile instructors with a reputable background in the course topic.	To coordinate the appropriate mix of visiting practitioner knowledge and local instructor skills & experience.	Provide medium to high cost ‘workshop’ courses (3-4 days) that ‘fit’ with corporate budgets for annual professional development allowances.	Provide medium to high cost ‘residency’ courses (10-14 days intensive) supported with distance learning & online instruction for University certificate programs.

The market strengths of the west coast destination are as follows:

- Opportunities for co-learning with local Adult Learners and long term capacity for local training/employment needs (as opposed to creating programs strictly for perceived Adult Learning market demand);
- Targeting local learning needs and appropriate University Certificate programs may provide access to additional training support scholarships or learning bursaries to offset program costs and support local learner enrollment;

- Opportunity to create a community tour learning pattern in which all west coast communities benefit from the education tourism market and visiting learners benefit from a diversity of local community immersion experiences.

7.4 Elder Hostel Comparison: [Road Scholar Tours](#)

Table 15 outlines the key market characteristics that differentiate Elder Hostel programs visiting the west coast from a comparable program called Road Scholar Tours.

Table 15: Competitive analysis of education tourism experiences for Elder Hostels market

Market Objectives (not limited to these)	West Coast Market Objectives (not limited to these)	Road Scholar Tours Market Strategy	West Coast Market Strategy
Provide all-inclusive cost competitive packages to retired learners (55 yrs. and up)	Provide well coordinated education programs that focus on the best of the west coast life-style (walking, festival attractions, local stories)	Road Scholar tour programming website, not for profit social enterprise (Donor supported)	Focus on 'good value and good life-style'
Caters to life long learning and "going where others can't"	Delivers program content with local knowledge keepers and story tellers	Focuses on connecting with community "insiders" and local story tellers	Focus on the legitimacy of local program delivery and traveling through different communities
Provides life long learning and a social experience for building friendships (safe for solo travelers)	Builds partnerships with Life Long Learning organizations who seek long term relationship with west coast communities	Marketing closely linked with network of Life Long Learning Institutes and affiliated members	Focus on Domestic market within BC, targeting Life Long Learning Institution Members and Visiting Friends & Relatives segment
Focus on in depth educational experience (the who, what, where and how)	Focus on linking-in with west coast researchers and scientists who can tell the west coast natural history and cultural history story	The strong education component attracts like-minded travelers and creates a successful learning environment	Target the retired educator to build cohesion among group participants and knowledge sharing with local researchers

The market strengths of the west coast destination are as follows:

- Opportunities for learning with local knowledge keepers, local researchers and local education organizations;
- Unique opportunity to engage in culturally safe knowledge sharing experiences with local First Nations;
- Opportunity to experience a unique mix of healthy lifestyle activities including outdoor leisure and learning programs; and
- Opportunity to tour different west coast communities and experience place based immersion learning and participate in local stewardship initiatives

8. Education Tourism Marketing Mix and Market Development Recommendations

The individual target market segment objectives and strategies that differentiate the west coast market from competitive education tourism markets can be further described in terms of specific user group socio-demographics and travel habits. These characteristics are indicative of our estimated 'best guess' based on our preliminary research results. Further market testing is required to support specific marketing approaches and an appropriate marketing mix. However, the following table based on four target market segments indicates a good portfolio of 'best prospect' segments based on the breadth of age demographics, ease of market access and shared leisure and learning interests.

Table 16 presents market segment characteristics that inform the market mix (next page).

Table 16: Market Segment Characteristics Supporting a Market Mix

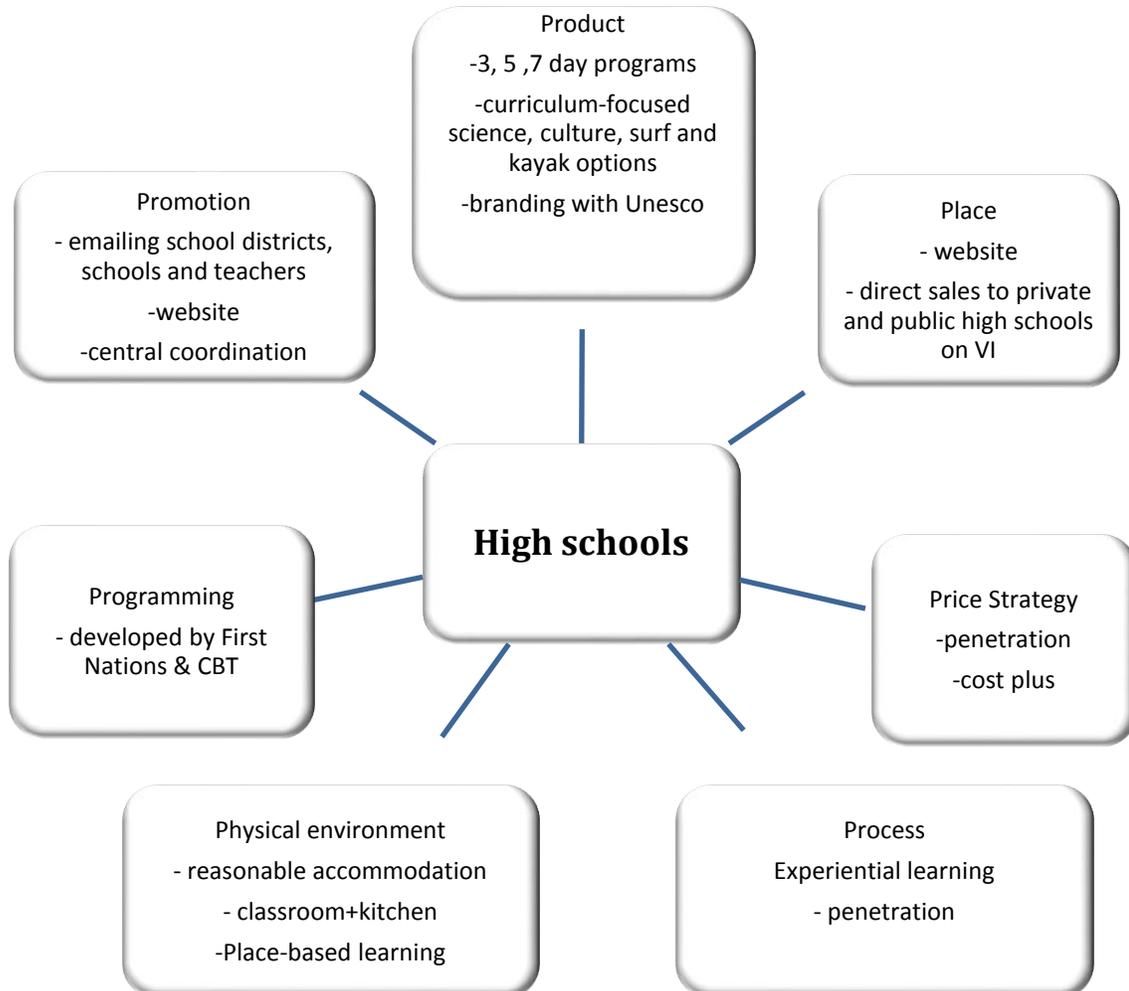
Characteristics	University Field Schools	Adult Learning	High Schools	Elder Hostel
Socio-Demographics				
Age	20-35	> 35	13-18	>55
Disposable income	Low-Medium	High	Low	High
Children (dependents)	No	Yes	No	No
Children (ages)	-	> 5	-	-
Environmental Interests	Yes	?	Yes	Yes
Cultural Interests	Yes	Yes	Yes	Yes
Growth Trend	Up	Up	Up	Up
Holiday/Days Entitled	7-14	7-14	5-10	?
Leisure Interests	Surfing, Kayaking, Hiking, Snorkeling, Swimming, Boating, Whale Watching	Yoga, Meditation, Engaged Seminars, Surfing, Hiking, Kayaking, Eating local foods, Golf	Surfing, Kayaking, Hiking, Snorkeling, Swimming, Boating, Whale Watching	Walking, Golf, Aquariums, Seminars, Nature Walks, Whale Watching, Festivals, National Parks
Learning Interests	Env. Issues, local knowledge keepers, hands-on co-learning, community diversity, FN cultural sharing	Certificate program/specific training needs, co-learning with local adult learners, FN cultural sharing	Outdoor education, BC curriculum, hands-on co-learning, FN cultural sharing	Seminars with local knowledge keepers & story tellers, hands-on learning, guided nature tours, community diversity, FN cultural sharing
Location	Cities	Cities	Cities	Urban
Travel Habits				
Awareness of Destination	High	High	High	High
Accommodation	Budget	3-5 star	Budget	Budget
Adventurous/risk takers	Yes	No	Yes	No
Booking Mechanism Used	Internet	Internet	Internet	Internet
Ease of Reach	High	Medium	High	High
Mode of Travel	Car/Air	Car/Air	Coach (private)	Coach
Season of Travel	Spring, Summer	All Year	Spring/Fall	Spring/Fall

In addition to the market segment socio-demographics and travel habits, the following table illustrates the potential revenues for each user group trip and the proposed cost per person per trip. These are estimated figures based on our research results and existing visitor trip pattern information.

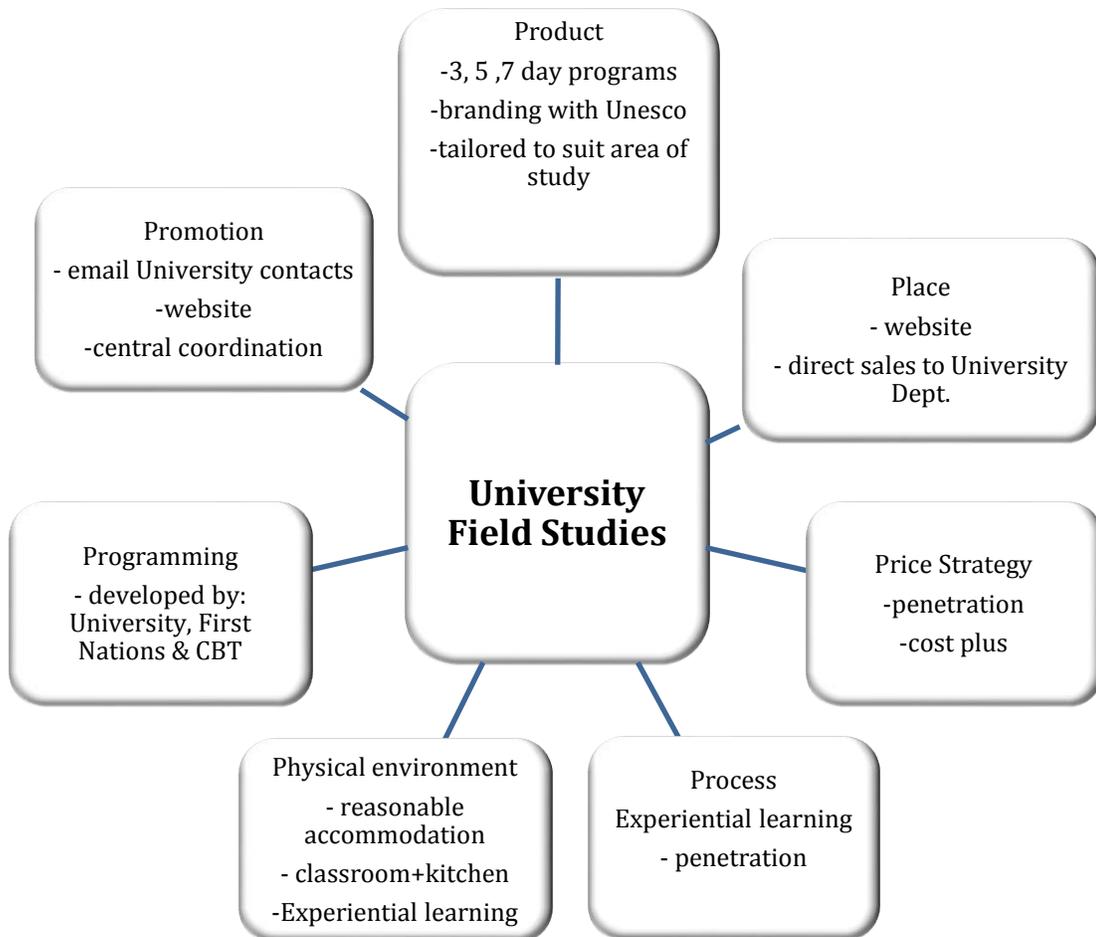
Table 17. Comparison of Target Market Mix for Estimated Cost/day and Regional Value/trip

	Cost per person/trip	Number of People in group	Number of days/trip	Month for trip	Cost/person /day	Regional value/trip
High School Outdoor Education	\$1890	20	5	May-Jun. Oct.-Nov.	\$378	\$37800
University Field Schools	\$2250	15	10	Apr.-May Aug.-Sept	\$225	\$33750
Adult Learners	\$2640	15	8	varies	\$330	\$42000
Elder Hostel	\$1530	25	6	Mar-Apr. Sept-Oct.	\$255	\$38250

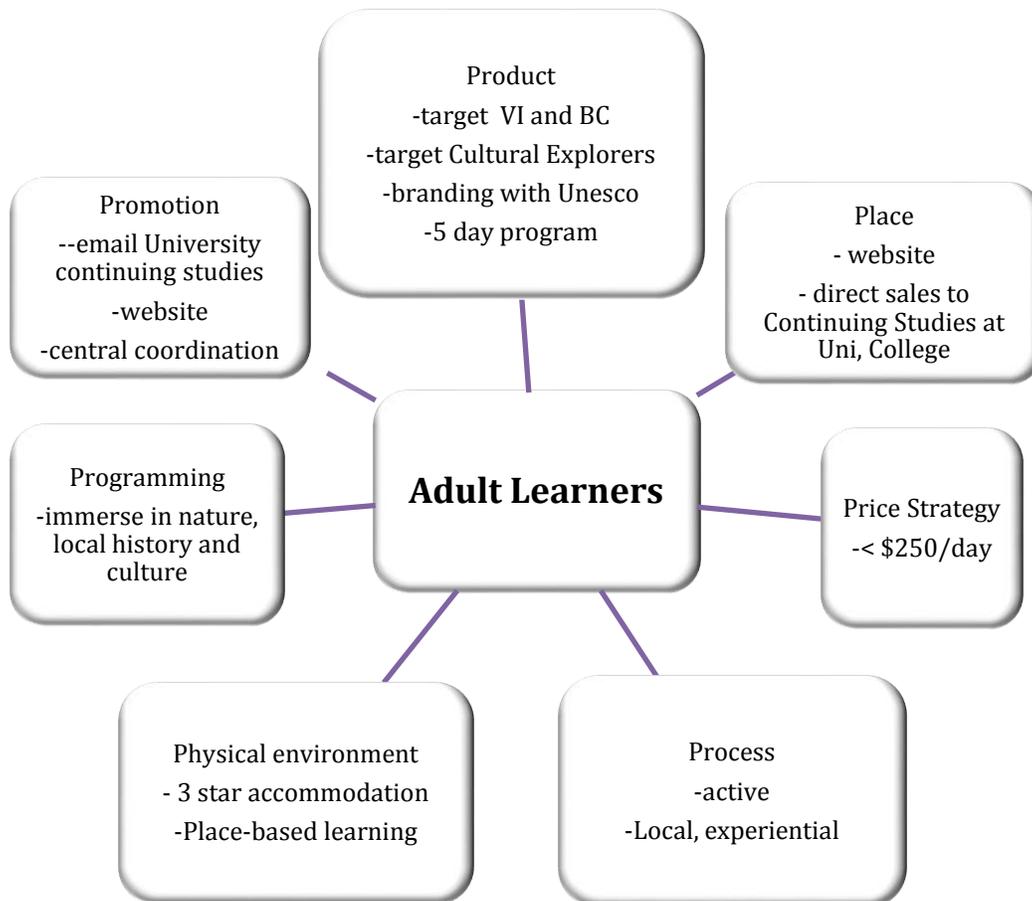
8.1 High School Marketing Mix



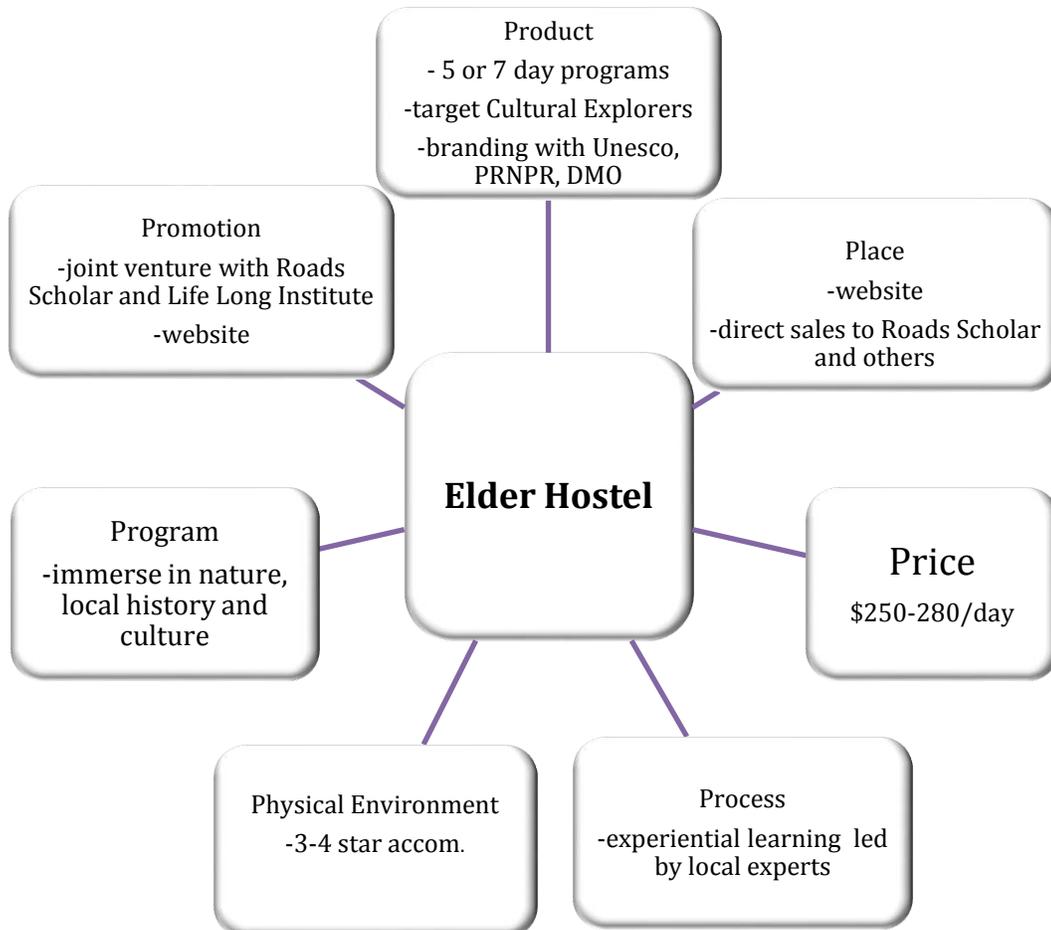
8.2 University Field Studies Marketing Mix



8.3 Adult Learner Marketing Mix



8.4 Adult Learner Marketing Mix



9. Market Development and Community Recommendations

The section presents recommendations for market development and those specific to the community level.

9.1 Market Development Recommendations

As illustrated in *Section 6. Education Market Segmentation Analysis*, there are several areas in which the four market segments can be further developed. Table 18 outlines several suggestions for moving forward in the categories of product content, coordination and service provision. (next page)

Table 18: Summary Table of Market Development Recommendations for Four Priority Target Markets

Categories	High School Outdoor Education	University Field School	Adult Learning	Elder Hostel
Product Content	Pre-package BC curriculum-justified 'mix' of learning activities	Link with organizations that provide hands-on learning from local knowledge keepers; Provide culturally safe knowledge sharing with First Nations;	Pre-package 'mix' of learning activities that contribute to healthy lifestyle (leisure & education combined); Develop partnerships with University Certificate programs in areas of local adult learning priorities.	All inclusive package of meals, accomm. & activities Local stories, local experts, local experience Mix of learning and walking (Healthy Lifestyle)
Coordination	Coordinate local hands-on outdoor learning within a diversity of communities; Coordinate programing with local organizations that links community co-learning with cultural sharing and hospitality; Coordinate activities between communities	Coordinate stewardship-based research & service projects with local environmental education organizations;	Coordinate program relevant activities with local organizations in different communities; Coordinate the local learning needs with an attractive learning itinerary for visiting learners	Coordinate appropriate programing with local organizations Coordinate activities between communities
Service Provision	Access to a cluster of accommodation, kitchen facilities and class room space in several west coast communities;	Access to a cluster of accommodation, kitchen facilities and class room space in several west coast communities;	Access to comfortable accommodation and high quality food catering services in each community (community tour 'trip pattern');	
Transportation	Access to transportation links between communities;	Access to transportation links between communities;	Access to transportation links between communities;	Access to comfortable mid-cost accomm., affordable restaurant meals
Training and HR			Access to additional job training funds, scholarships and or bursary monies to offset program costs; and	

9.2 Community Recommendations

There are ten main recommendations from the research for the communities to advance the learning economy on the west coast of Vancouver Island:

1. One central regional organization, with education, research, and FN culture in their mandate, to perform a coordinating role between the four communities.
2. More clustering and coordination of services (accommodation, kitchen, meeting space) will enhance the market segments of High School Outdoor Education and University Field Studies.
3. A marketing plan that encompasses a central hub, with four participating communities (hub and spoke model).
4. A system of transportation links between communities, including water and land transportation.
5. The primary focus for delivery of educational tourism will be the months from October to May.
6. A website that promotes, brands, and offers packages in the four market segments, in the four locations of the network; and exemplifies community and economic reciprocity.
7. Experiential, place-based learning is essential to success.
8. Surfing, First Nations History and Culture, are key attractors to the region.
9. Collaborative Branding with successful existing branding in UNESCO and local DMO's.
10. Elderhostel is a new and emerging market.

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Appendix A: Education Tourism Semi-structured Interview/On-line Survey Contacts

Biosphere Studies / Environmental Studies

Existing Visitors	Contact Date	Potential Visitors	Contact Date
Langara College, Margaret Heldman, Dean, Faculty of Science mheldman@langara.bc.ca	Oct. 16	Rain Forest Alliance Trisha Convey info@ra.org Rainforest Alliance, New York, NY	Oct. 8.
Mark Smith masmith@langara.bc.ca	Oct. 16	University of Alberta Extension Department bill.connor@ualberta.ca	No response
Mark Roseland, Director, Centre for Sustainable Community Development Mark.roseland@sfu.ca	Nov. 5	Douglas Ransom (BCIT Program Head) doug_ransome@bcit.ca	No Response
University of the Fraser Valley allan.arndt@ufv.ca	On-line Survey	University of Northern BC Ecosystem Science & Management Program pwright@unbc.ca	On-line Survey
University of Victoria, Dept. of Geography, Phil Dearden pdearden@mail.geog.uvic.ca	On-line survey	Wolfgang Haider, Director of Parks & Recreation wolfgang_haider@sfu.ca	Oct. 18
VIU Grant Murray, Canada Research Chair in Coastal Resource Management grant.murray@viu.ca	On-line survey	Kevin Smith, Dean of graduate programs, University of Northern BC, Kevin.smith@unbc	No Response
Kelly Bannister, UVIC kel@uvic.ca	Online-survey	Dr. Steve Beissinger, Conservation Biology, U of Berkeley beis@berkeley.edu	No Response
Sharmalene Mendis Millard, University of Waterloo, srmendis@uwaterloo.ca	Oct. 29	Joyce Gutstein, Director Environmental and Community Outreach, U of Davis, John Muir Institute of the Environment jjgutstein@ucdavis.edu	No Response
Leslie King, RRU leslie.king@royalroads.ca	On-line Survey		
Dr. Rick Kool, RRU	Oct. 27		
Dr. Stefan Limquist, U of Guelph	Oct. 26		
Dr. Barb Beasely, Quest University	On-line Survey		

Aquarium/Aquaculture/ Marine Studies

Existing Visitors	Contact Date	Potential Visitors	Contact Date
Woods Hole, MA education@whoi.edu Academic Programs Office	No Response	VIU- Director of Centre for Shellfish Studies Don.Tillapaugh@viu.ca	No Response
Cameron MacDonald, Biology Instructor cmacdonald@langara.bc.ca	Oct. 17	Bamfield Marine Science Centre: Business Development and Marketing, Brenda Spivey	No Response
University of Washington- Rick Keil rickkeil@uw.edu	Oct. 13		
University of Washington Cheryl Greengrove cgreen@uw.edu	On-line Survey		
Royal Roads University Dr. Audrey Dallimore	On-line Survey		
VIU, Department of Fisheries and Aquaculture Duane. Barker@viu.ca	No Response		
University of Victoria, Dr. Rosaline Canessa rosaline@uvic.ca	On-line Survey		

Community based Research (Community-University Partnerships)

Existing Researchers	Contact Date	Potential Visitors	Contact Date
Andrew Day WCA, (University- Community Partnerships)	Oct.23	VIU Director of Community-based Research Institute Robin June Hood robinjune.hood@viu.ca	Oct. 20
		Rupert Downing, ED of the Community Social Planning Council of Victoria Rupert@CommunityCouncil.ca	Oct. 29
		Janet MacDonald Manager of Recruitment and Admissions Coady Institute jamacdon@stfx.ca	Oct. 24
		Dr. Leslie Brown, Institute for Studies and Innovation in Community University Engagement, University of Victoria. lbrown@uvic.ca	Oct. 23

Niche Market Education Tourism

Existing Visitors	Contact Date	Potential Visitors	Contact Date
Road Scholar (Elderhostel) Marie Billinger, mbillinger@routesadventures.ca	Nov.7	Tourism Vancouver Island, Nadine Chodi, Trade & Media Coordinator Nadine@tourismvi.ca	Nov.7
Feast Epicurean Concierge, Karma Brophy, karma@inboundwest.com	Nov. 7	Tourism Vancouver Island, Dave Petryk, CEO, dave@tourismvi.ca	Nov.7

High School Outdoor Education

Existing Visitors	Contact Date	Potential Visitors	Contact Date
Maria Montessori School. Christina Hofmann, christinahoffmanster@gmail.com	Oct. 19	Sun Peaks Community School, Al Raine	Sept. 26
Saint Michaels Univeristy School (SMUS) Peter Macleod peter.macleod@smus.ca	Oct. 23	Sea to Sky Outdoor School, Gibsons, B.C. Tim Turner	Oct. 29
Glen-Lyon Norfolk School (GNS) Mully Jackson mjackson@mygns.ca	Oct. 23	SALTS Society, Victoria, BC. Robin Irving	Oct. 28
Pacific Christian School, Sue McKerracher. sue.mckerracher@pacificchristian.ca	Oct. 25		
Whistler Secondary School, Rod Thompson, RThompson@sd48.bc.ca	Sept. 25		

Appendix B: Education Organizations and Locally Developed Curriculum of the West Coast Region

Education Organizations

1. **Association of Wetland Stewards for Clayoquot and Barkley Sounds:** This organization conducts research, monitoring, and education to promote stewardship of amphibians. They offer slide shows, workshops, and educational materials to the public. There are also volunteer opportunities to help with research, monitoring, and stewardship. www.splatfrogstunnel.blogspot.com
2. **Carving on the Edge Festival Society:** This annual celebration of west coast carvers is held each September in Tofino and Ucluelet. www.carvingedgefestival.com
3. **Central Westcoast Forest Society:** The CWFS participates in stream and ecosystem restoration, research, education, and recreational opportunities. CWFS facilitates activities that include: interpretive walks, public presentations, educational resource materials, workshops on various topics, and educational stewardship events. www.clayoquot.org
4. **Clayoquot Action:** Clayoquot Action is a Tofino-based conservation organization committed to protecting the biocultural diversity of Clayoquot Sound through public education, citizen research and monitoring, and advocacy. They are available for information, presentations, and discussions. www.clayoquotaction.org
5. **Clayoquot Biosphere Trust:** The CBT conducts and supports research, education, and programs that advance conservation, build our understanding of natural processes in the marine and terrestrial ecosystems, and promote the health of individuals and communities through the Clayoquot Sound Biosphere Reserve Region. The CBT is available to provide background on the history of the creation of the Clayoquot Sound UNESCO Biosphere Reserve and the region in general. The organization operates a remote research cabin in Sydney Inlet. www.clayoquotbiosphere.org
6. **Friends of Clayoquot Sound:** A grassroots, community-based environmental organization with a mission to protect the ancient temperate rainforest and marine

environment of Clayoquot Sound. They are available for information talks and discussions. www.focs.ca

7. **hiłmehsaqin:** hiłmehsaqin is a recently developed nuučanuł language and culture organization primarily composed of Ahousaht First Nation members but which includes members from all other nuučanuł nations. Their mission is focused upon a long-term vision of developing a nuučanuł survival school located on remote nuučanuł territories. Their efforts are placed upon providing language immersion, traditional knowledge and skills development, and indigenous foods systems. For more information contact John Rampanen at 250-726-4023; johnnynootka@reindigenize.net.
8. **Hooksum Outdoor School Society:** The HOSS facilitates and encourages outdoor, environmental and cultural education and relevant skills training from their school in the traditional territories of the Hesquiaht First Nation. www.hooksumschool.com
9. **K^w isitis Visitor Centre:** This interpretive centre for Pacific Rim National Park Reserve includes two floors of exhibits on the natural and cultural history of the region. Park interpreters can provide educational programs. www.pc.gc.ca
10. **Language Tofino:** This local enterprise facilitates English language instruction and courses in English Literature and Writing. www.languagetofino.com
11. **Pacific Rim Arts Society:** PRAS hosts arts and culture events and workshops, including the Pacific Rim Arts Festival and the Cultural Heritage Festival. They work closely with First Nations communities and participate in youth outreach projects. www.pacificrimarts.ca
12. **Pacific Rim Whale Festival Society:** PRWFS hosted its first “whale fest” in 1986. The festival celebrates the migration of the grey whale through a variety of locally-based events. www.pacificrimwhalefestival.com
13. **Quuquatsa Language Society:** "Quuquatsa" translates to "the language we speak" and this organization's vision is to have a fluent Nuu-chah-nulth society/community. The organization plans, advocates, and works to rebuild practices of speaking, thinking, hearing, seeing, and dreaming in the Nuu-chah-nulth languages through preserving, learning, and teaching. For more information contact 250-723-8555; quuquatsa@gmail.com.

14. **Raincoast Education Society:** The RES's activities include summer camps, school programs, and support for local governments and businesses in Tofino and Ucluelet to become more environmentally sustainable. The RES hosts two major events each year: the Shorebird Festival in May and the Lantern Festival in August. The RES also developed the Raincoast Host Program, which trains front-line staff in local ecology and natural history. www.raincoasteducation.org

15. **Strawberry Isle Marine Research Society:** The SIMRS conduct research on marine mammals and pelagic birds. They also offer public presentations and education programs, including a Build-a-Whale Project. www.strawberryisle.org

16. **Thornton Creek Enhancement Society:** This hatchery outside of Ucluelet works to enhance salmon runs in Barkley and Clayoquot Sounds. The society runs open houses and offers hatchery tours. Contact 250-726-7566.

17. **Tla-o-qui-aht Tribal Parks:** The Tla-o-qui-aht Tribal Parks are watersheds managed to integrate human and ecosystem well-being as taught by our ancestors and adapted to today's situation. Tribal Park staff are available to share their work with researchers and educators and as guides within their territories. For more information go to www.tribalparks.ca or call 1-888-425-3350 or 250-725-3350, ext. 26. The primary contact is Terry Dorward.

18. **Tofino Botanical Gardens Foundation:** The TBGF operates the 12-acre Tofino Botanical Gardens and the Ecolodge/Clayoquot Field Station. Their mission is to inspire conservation of the world's temperate, coastal forests. Through garden exhibits, interpretive tours and signage, interpretive programs, the TBGF endeavors to explore the relationship between culture and nature by pursuing interests across disciplinary lines. www.tbgf.org

19. **Tofino-Clayoquot Heritage Society:** This Tofino-based organization engages in marine and terrestrial archaeology, heritage conservation, historical research, and

public education. They have a museum, open on request, and are available for lectures and events. Contact 250-725- 2008.

20. **Tofino Salmon Enhancement Society:** This hatchery outside of Tofino works to enhance salmon runs in Clayoquot Sound. Hatchery tours available. Contact 250-725-2376.

21. **Ucluelet and Area Historical Society:** This organization is working towards a museum for the local region. They have an archive and may be available for presentations. www.pacificrimhistory.com

22. **Ucluelet Aquarium Society:** The UAS operates a public aquarium, participates in research, and delivers educational programs at the aquarium and in the field. www.uclueletaquarium.org

23. **West Coast Aquatic:** WCA is a leader in watershed and coastal planning activities, aquatic research projects, aquatic economic development and information management. www.westcoastaquatic.ca/

24. **Wild Pacific Trail Society:** Dedicated to the promotion, protection, and expansion of scenic walking trails which showcase the unique natural and cultural treasures of the Ucluelet Peninsula. The society also delivers educational programs on the trail and at local beaches. www.wildpacifictrail.com

Locally Developed Curriculum

Global Education 11/12: Ucluelet Secondary School has developed a school board-approved curriculum for this course, which provides students with an opportunity to learn about a range of global issues and current events culminating in a 10-day field trip abroad.

Kayaking 11/12: Ucluelet Secondary School has developed school board-approved

curriculum for the course, which offers students an opportunity to gain the practical skills and certifications needed to work as a sea kayak guide, including leadership and interpretation skills.

Nuu-chah-nulth language resources: a range of resources have been developed including children's books, dictionaries, and a number of software programs. For more information, please contact the Clayoquot Biosphere Trust at 250-725-2219 or www.clayoquotbiosphere.org.

Sustainable Kids: The Tofino Botanical Gardens Foundation has developed curriculum for this program including many ideas for activities and linkages to BC's prescribed learning outcomes. www.tbgf.org/sustainable-kids/curriculum/index.php

Sustainability Studies 11/12: The Clayoquot Biosphere trust developed the curriculum for high school Sustainability Studies which is being offered at Ucluelet Secondary School. www.clayoquotbiosphere.org/web/wp-content/uploads/2012/05/Sustainability_Studies_Curriculum.pdf

Appendix C: Life Long Learning Institutes in British Columbia

Comox Valley Elder College

North Island College
Courtenay, BC V9N 8N6
(250) 334-5247
www.nic.bc.ca/ec
leanne.moore@nic.bc.ca

Eldercollege

Capilano College
North Vancouver, BC BC V7J 3H5
(604) 983-7531
www.capilanou.ca/ce/eldercollege
conted@capilanou.ca

Lifelong Learning for the Really Grown-Up

College of the Rockies
Golden, BC U0A 1H0
(250) 344-5901
www.cotr.bc.ca/golden
kcathcart@cotr.bc.ca

Lifetime Learning Centre Society

32444 Seventh Avenue
Mission, BC V2V 2B5
(604) 820-0220
www.lifetimelearningcentre.org
lifetimelearningcentre@telus.net

Society For Learning In Retirement

Okanagan University College
Kelowna, BC V1Y3A8

(250) 762-3989125
www.slrkelowna.ca
registrar@slrkelowna.ca

Third Age Learning at Kwantlen

Kwantlen University College
Surrey, BC V3W 2M8
(604) 599-2333
www.kwantlen.ca/talk
talk@kwantlen.ca

Appendix D: Education Tourism: Literature Review of Key Trends. Phase 1, August 18, 2014

Executive Summary

Education tourism, a relatively new segment of Special Interest Tourism, attracts tourists who are either interested in learning while they travel, or are purposely traveling for a specific learning experience. Opportunities for developing community hosted education tourism exist, especially for regions that can offer a novel destination, experiential learning and an immersion in nature and heritage. However, there are several external forces driving the tourism sector as a whole that need to be considered.

Our review of literature, from academic, public, non-profit and private sector, identifies a range of trends and issues to consider, most notably the following:

1. The profile of the average tourist in Canada is shifting from being a passive receiver of leisure who is getting away from 'work', to an active engaged outdoor adventurer who is interested in life long learning.
2. Canada's tourism market has evolved over the years, most notably seeing a decrease in the number of European travelers and an increase in the number of Asian visitors. American visitation has decreased over the years but is recently experiencing a rebound, illustrating the long-term unpredictability of markets. Domestic travel remains strong.
3. The average Canadian tourist, between 35 and 64 years of age, seems highly active, is interested in health and wellbeing, is seeking green tourism and travels to destinations with a dual purpose of visiting friends and family while getting close to nature. However there is a growing number of tourists who travel after the age of 50 and who are over 65, a group with more time, flexibility and income to engage in education tourism.

4. Owing to a lack of government funding for marketing and increasing global and regional/provincial competitiveness, , the number of sectoral and regional strategic alliances, involving, public, private, as well as local and provincial levels, is not only growing but critical to success.

When these trends in tourism are coupled with the trends in education such as an increasing demand for life-long learning, the growing desire for experiential place-based learning, and the increasing need for cross-cultural exchange and knowledge sharing, the communities in the Pacific Rim seem well situated to offer education tourism experiences that will meet the growing demand. However, the growing demand for niche markets, in both tourism and education sectors, present additional risk and vulnerability to independent producers. Further research is required to explore the ways in which strategic alliances have strengthened local education tourism development and mitigated fragmentation.

Key Gaps in the literature were noted that need exploration in the market research:

- What are the key challenges to developing markets for educational offerings?
- How best to balance the interests of each individual community with those of the region as a whole to create competitive advantage?
- What are the best ways to foster relationships with the supply chain - local, university, and UNESCO biosphere – to ensure success?
- What is the nature of the competition?
- What are the vulnerabilities of education tourism, and how can resilience, as a key foundation, be embedded into the market strategy?
- What is the duration of training/commitment to educational learning for the market? What is the nature of the relationship between proposed subjects or educational themes and the region?

Introduction

Education tourism is a relatively new and specialized segment of the tourism marketplace with opportunities for further development, given the right match between consumer interests and host community education objectives. The Canadian Tourism Commission (2001) defines education tourism as a range of experiences along a continuum from 'general interest learning while travelling' at one end to 'purposeful learning and travel' at the other (Ritchie, Carr and Cooper 2003). However, defining the market for education tourism requires a more specific definition with which to understand the exchange transactions between consumers, who exercise choice and preference for a specific learning and travel experience, and the types of opportunities that are aligned with the Pacific Rim education tourism vision. Ritchie et al. (2003) define the education tourism continuum more specifically as,

...tourist activity undertaken by those who are undertaking an overnight vacation and those who are undertaking an excursion for whom education and learning is a primary and secondary part of their trip. This can include general educational tourism and adult study tours, international and domestic university and school student's travel, including language schools, school excursions and exchange programs. Educational tourism can be independently or formally organized and can be undertaken in a variety of natural or human-made settings. (p.18).

While even this definition remains quite broad, the purpose of this report is to provide a brief overview of the current trends and opportunities in education tourism, with which to narrow the scope for preparing an education tourism market demand development strategy for the Pacific Rim region. This review is presented in Phase 1 of the project and will be updated as new resources are discovered to form part of the final report.

Trends in Education Tourism

The growth in tourism has increased steadily over the last 30 years, both nationally and internationally, resulting in an increasingly specialized diversity of market niches such as ecotourism, cultural heritage tourism, adventure tourism and rural destination tourism (Novelli 2005, Papathanassis 2011). The United Nations World Tourism Organization projects that tourism will continue to grow at roughly 4% world-wide year-over-year for

the next 20 years (UNWTO 2013). Not only are the number of tourists increasing, but the expectation and scope of interest of travelers, as they gain a life's history of travel, is evolving.

As tourists continue to seek new and unusual experiences, across a diversity of geographies and cultures, the demand for education and new learning opportunities within tourism seems to be expanding (CTC 2011). Several socio-economic drivers appear to be directing this trend towards a convergence of Education and Tourism sectors. For example, Ritchie et al. (2003) conceptualize educational tourism as an emerging niche arising from the growing trend to seek active holidays outdoors, in which there are unique learning opportunities, and the rising trend in education to learn experientially such that knowledge is a product of learning from a 'once in a life-time' experience, often gained from studying abroad (Stone and Petrick 2013). More specific drivers of these trends are listed below.

- Transition from industrialized economy to knowledge innovation economy (or learning economy) in which 'life-long learning' is necessary for adapting to rapidly shifting changes (environmental and economic) (Brown 2013, Diduck et al. 2012).
- Increasing demand for education as societal values support social equity and access to 'all learning activity, skills and competence, within a personal, civic, social and/or employment related perspective' (European Union 2001 in Ritchie et al. 2003:5)(Brown 2013).
- Growing demand for international experiences in education curriculum, supported by government policy and workplace culture that requires on going higher learning (Brown 2013).
- Rising enrollment of Asian students in Canadian Universities (CTC 2011).
- Rapidly growing demand for English language training (Nickerson and Kerr 2010).
- Increasing number of reciprocal international university enrollment agreements, particularly within EU, to increase the number of study abroad education programs (Brown 2013).
- Increasing trend in experiential learning in which 'content knowledge can lead to personal growth, which can lead to an openness and to more learning' (Stone et al. 2013:734).
- Shifting tourist motivations that are more destination focused and experience oriented (Nickerson and Kerr 2010).
- Increasing recognition of the cultural-exchange benefits of peer-to-peer learning, particularly with field-based education curricula (Novelli and Burns 2010).

- Growing demand for indigenous students in earth science education using place-based curricula, emphasizing experiential, outdoor learning in familiar environments within the traditional homelands of the indigenous groups (Riggs 2004) .
- Growing recognition of the need for inclusion of relevant indigenous scientific knowledge in earth sciences curricula wherever possible and explicit involvement and cooperation of indigenous community members, elders, and educators in the design of the content, location, and delivery of curricula and programs (Riggs 2004) .

Trends Impacting Education Tourism

The market demand for education tourism is more specific than the broader tourism sector. However, the changing external environment influencing the origin of tourists and their travel destination has an impact on the future opportunities for education tourism in the Pacific Rim region. The following trends illustrate several significant shifts in the Canadian tourism industry.

Trends in Travel and Tourism in Canada

- Canada's tourism industry growth is slow, corresponding with slow GDP growth, high levels of sustained unemployment, high value of Canadian dollar in 2013 and low level of consumer confidence (Passport 2014b).
- Domestic trips are increasing, compared with inbound trips, with an increasing amount of spending and number of tourists traveling (Passport 2014a).
- Airline industry carrier agreements between Canada and China are expected to strengthen tourism industry, increasing inbound tourism from Asia (Passport 2014b).
- Competition from international tourism markets is increasing (Passport 2014b).
- Net loss in number of inbound trips to Canada since 2000 (Passport 2014b).
- Canada's competitive advantage in the Global tourism market is its wilderness parks and pristine areas, "well known across the world". National parks had a 4% increase in number of visitors in 2013 (Passport 2014a) ((Passport 2014b).
- Inbound tourism from Europe is decreasing, but number of tourists from Brazil, Mexico, Japan and India are increasing (Passport 2014b).
- Tourism inbound and outbound between US and Canada continues to provide the main flow of tourist travel (Passport 2014b).

Political and Legislative Trends

- Decreasing federal funding for Canadian Tourism Commission resulting in decreased funding for tourism industry marketing (Passport 2014a).
- High taxation and user fees on travel and accommodation in Canada constrain both inbound and outbound travel (Passport 2014b).
- Continued growth in public private partnerships (PPPs) between provincial governments and private sector to mitigate declining federal support (Passport 2014a).
- Growth in eco-tourism, green tourism and VFR (visiting friends and relatives) market segments (Passport 2014b).

Societal and Cultural Trends

- Growing interest in adventure and wilderness travel “complimented by a strong network of niche operators in outdoor activities” ((Passport 2014b):4)
- Natural wilderness and parklands support growth trend in green tourism (Passport 2014a).
- Canada is a “dream destination” for many inbound travelers (CTC 2011).
- Rising interest in green/ecotourism coupled with changing profile of tourist as more active and engaged in learning (Falk et al. 2012).
- Increase in health and wellness tourism well suited to domestic and inbound tourism sectors (Passport 2014a).
- Increasing number of Domestic tourists between the ages of 50-64 and over 65 (see Table 1)
- Increasing number of International (Asian) tourists between ages of 35-49 (Passport 2014a, CTC 2011).

Table 1. Trends in Canadian Holiday Takers by Age 2008-2013

'000 persons	2008	2009	2010	2011	2012	2013
0-14	2,563.3	2,638.2	2,241.9	2,226.2	2,293.0	2,247.1
15-24	2,088.6	1,790.2	1,494.6	1,484.1	1,550.9	1,590.8
25-34	2,183.6	1,978.7	1,868.2	1,914.9	1,972.4	2,074.0
35-49	5,886.1	5,841.8	5,604.7	5,419.7	5,473.9	5,577.6
50-64	4,367.1	4,522.7	5,044.2	5,195.6	5,117.6	5,220.0
Over 65	1,898.7	2,072.9	2,428.7	2,598.7	2,546.7	2,505.6
Total	18,987.5	18,844.6	18,682.3	18,839.2	18,954.5	19,215.2

Source: Euromonitor International from official statistics, trade associations, trade press, trade interviews
Note: Age of national tourists (domestic and outbound)

Technological Trends (impacting education)

- Increasing presence of social media and on-line information tools to locate travel destinations based on specific preferences in desired experience and increased flexibility in booking travel and accommodation on-line (Nickerson and Kerr 2010).
- Internet booking accounted for \$507million sales in 2013.
- Increasing demand for on-line distance education and shorter on-campus residency programs and shorter semester field schools (Brown 2013) .

In summary, these trends suggest the future of tourism will include highly specialized market segments that attract specific kinds of consumers who are seeking destinations both for the outdoor immersion in nature and the learning opportunities that arise from novel cultural experiences. On the producer side, the shift to specialized niche markets ‘fits’ well with community hosted education tourism. However, there are associated risks and vulnerabilities that come with increasing market segmentation. The rising trend in strategic alliances is one we need to explore further.

Tourist Motivations for Educational Experiences

Recent changes in the demand side of education tourism are associated with the changing composition of the Western tourist market. In the late 1980s, approximately 60% of Western tourists wanted to experience a fun and relaxing holiday in close proximity with nature. Today, that percentage of this traditional tourist profile is shrinking while there appears to be an increasing desire among 30-45% of tourists to broaden ‘one’s horizons’, experience something new and learn about other cultures (see Table 2).

In general, the new tourist is better educated, more culturally aware, interested in spending time in the natural environment, more curious and analytical, often seeking self-knowledge and knowledge of other cultures, and more active in their tourism participation (Reisinger 2013). Similarly, people seem to be traveling to a specific destination because they have a particular interest that can be pursued in a particular place and they are willing to seek ‘novel, adventurous, and niche-related activities’ (Nickerson and Kerr 2010:30). Read (1980) explains this as Special Interest Tourism in which the destination is, “the hub around which the total travel experience is planned and developed” (in Ritchie et al. 2003:195). The rise of Special Interest Tourism and changing tourist motivations is driving the demand for

niche markets such as ecotourism and cultural tourism, both of which involve a component of education and learning.

Table 2. Visitor Motivations for Education Tourism

Motivational Category	Specific Motivations
Physical	<ul style="list-style-type: none"> • Renewing/restoring body & mind, health purposes • participation in sports and outdoor activities • Contact with an outdoor way of life
Cultural	<ul style="list-style-type: none"> • Curiosity about foreign countries, people, culture and places • Interest in art, music, architecture and folklore • Experiencing specific cultural events and festivals
Social	<ul style="list-style-type: none"> • Visiting Friends and Relatives • Meeting new people • Seeking new friendships and relationships • Travelling for travel experience • Prestige and status • Fashion • Pursuit of hobbies • Continuation of Education or Learning • Seeking business contacts and pursuing professional goals • Conferences and meetings • Strengthening family bonds
Spiritual	<ul style="list-style-type: none"> • Visiting places and people for religious reasons • Traveling as part of a pilgrimage • Traveling for personal development • Contact with nature
Fantasy	<ul style="list-style-type: none"> • Escapism from one's permanent social environment • Wish fulfillment • Personal excitement of travel

(adapted from Ritchie et al. 2003:31)

Opportunities for Education Tourism

The recent emergence of 'niche tourism' markets is reflective of the shift away from 'mass tourism' market strategies, suggesting a more tailored and intentional 'fit' between

consumers and their host communities. From the perspective of the education tourism consumer, the product appears to be “niched” according to their specific interests and individual experiential needs. However, from the perspective of the host community, the supply of education tourism products is a factor of the unique attributes of place, people and culture (Novelli 2005). In terms of a business strategy, the opportunity for education tourism rests within the larger arena of market competition, both within the tourism and education sectors. Therefore, the opportunities for education tourism can be further defined according to various approaches used to define “niche tourism”, such as:

- *A geographic or demographic approach* that highlights the specific ecology and culture of the location of the host community in which the learning will take place;
- *A product related approach* that is shaped according to specific educational needs and wants of the consumer and the specific products delivered by the host community; and/or
- *An activity-based approach* that is designed according to specific activities associated with the unique lifestyle of the host community.

Examples of Emerging Types of Niche Education Tourism

There are numerous examples of niche market segments emerging that may be a good ‘fit’ with education tourism development in the Pacific Rim Region. The following examples have been selected based on our initial overview of the local documents that articulate elements of a vision of education tourism and/or elements of an education tourism strategy. Further examples will be provided as we discuss our findings with the host communities and identify appropriate categories with which to narrow our research scope.

Geotourism and Environmental Interpretation

A geology focused approach to explaining the meaning and significance of sites based on local and scientific knowledge of the geological and cultural history of a specific geographic feature. Examples include the Dorset and East Devon Coast in the UK (Hose 2005), L’Anse aux Meadows and other related sites of Viking Archaeology <http://www.vikingtrail.org>.

Ecotourism, Environmental Education & Transformational Learning

Growing awareness of climate change effects and the rising number of public education campaigns such as www.theclimateproject.org, are contributing to an increasing desire to visit areas of wilderness and experience protected areas of rich biodiversity. Innovative Environmental Education programs are embracing this demand, offering interdisciplinary approaches to experiential learning and teaching, primarily in an outdoors-learning environment. Examples include the BC-based Redfish School of Change www.schoolofchange.org, which offers a 6 week field school at wilderness sites along the west coast of Canada, focusing on ecological sustainability and social equity (Mitchell 2010).

Cultural Heritage Education Tourism

A cultural heritage approach to education tourism focuses on the lifestyle/heritage experiences offered by a hosting community for the purposes of sharing specific cultural teachings to visiting learners (adapted from Silberberg 1995). Examples include the Cowichan Nation Quw'utsun' Cultural and Conference Centre in Duncan, BC (Silberberg 1995, Zeppel 2002) and the Haida Heritage Centre on Haida Gwaii.

<http://www.aboriginalbc.com/members/quwutsun-cultural-and-conference-centre/center>

<http://www.haidaheritagecentre.com>

Gastronomic Education Tourism

The growing demand for 'slow food' and locally sourced organic food products is a contributing factor to the growing trend in food tourism, defined as, the 'visitation to primary and secondary food producers, food festivals, restaurants and specific locations for which food tasting and/or experiencing the attributes of specialist food production are the primary motivating factors for travel' (Hall and Mitchell 2005). Strong local alliances that build local supply networks and build on regional branding are key strategies for mitigating risk and vulnerability (Telfer 2003). For example, the tastes of Niagara Culinary Alliance

<https://ontarioculinary.com/wineries-of-niagara-on-the-lake-taste-the-season-touring-passes-on-sale/>

Volunteer Tourism

Volunteer tourism provides opportunities for experiential travel that appeals to people (typically youth) seeking meaning and education in their goal to contribute to the betterment of society and their individual pursuit of inner freedom, perceived self-worth, sense of values, and personal identity. In the UK, youth within the 'gap year' between high school and post secondary education, are known as the 'gappers' and form a specific target market for charities (Callanan

and Thomas 2005):186). More globally, there is growing demand and interest for working abroad in community-like settings such as those created with organic farming. Originally called 'working weekends on organic farms', the WWOOF is now an international organization that uses an on-line interface to link volunteers with organic farmers and growers <http://www.woof.net>.

Field-Schools & Study Abroad Programs

Community-based field schools provide an experiential learning opportunity for cross-cultural exchange, and ideally a 'novelty space' (Riggs 2004) in which hybridized knowledge can be co-produced as local 'hosts' engage with visiting 'guests' for meaningful co-learning (Novelli and Burns 2010). Innovative learning experiences consisting of intensive workshops, locally guided field trips and outdoor curricula are conducive to once-in a-life-time transformative 'learning in the environment'. While much has been written on the numerous benefits of place-based learning, such as longer retention of knowledge and an awakened sense of 'meaning', there are numerous reasons why universities are less likely to successfully facilitate these exchanges on their own. More recent literature points out the need for the host community to be engaged as an active partner to help mitigate the barriers and facilitate effective cultural learning (Novelli and Burns 2010). Examples of host-based field-schools include the Haida Gwaii Higher Learning Society <http://www.haidagwaisemester.com> and the School for Field Studies <http://www.fieldstudies.org>.

Conclusions

Given the current trends in tourism and education sectors, the conditions seem timely for the development of an education tourism sector in the Pacific Rim Region. An increasing demand for life-long learning, the growing desire for experiential place-based learning, and the increasing need for cross-cultural exchange and knowledge sharing, all align well with the unique and outstanding ecological and cultural learning opportunities the communities in the Pacific Rim Region have to offer.

However, the growing demand for niche markets, in both tourism and education sectors, will likely present additional risk and vulnerability to independent producers. Much can be learned from existing partnerships and strategic alliances that have been created to build strong supply and demand networks. Further research is required to explore the ways in

which strategic alliances have strengthened local education tourism development and prevented fragmentation.

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