
NANAIMO SPORT TOURISM

Strategic Analysis and Sport Tourism Strategy

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VERSION 6.00

PRESENTED BY:



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Introduction

Spearheaded by the Nanaimo Hospitality Association (NHA) and in partnership with the City of Nanaimo and Tourism Nanaimo, this project was launched to conduct a strategic analysis of sport tourism in Nanaimo and develop a realistic sport tourism strategy that would be suited to the region's current economic and political climate. The initial project was carried out between November 2017 and December 2018, with follow on work and evolutions of the strategy annually. The most recent iteration (this version) was revised in March 2022.

The goal of this report is to present the strategic analysis, industry research, and insights that supports the recommendation to "build off the base", by creating a sport tourism strategy focused on continuing the support of sports already strong in the Nanaimo community (e.g., ice hockey, softball, basketball, lacrosse, etc.), while building out targeted actions and investments focused on cycling, paddle sport, individual or small team sport, Indigenous sport, adaptive / para-sport and sport administration. In addition, this strategy will also build the case for "Victoria / Vancouver major event spillover".

Industry Context

Pre-COVID, tourism represented more of Canada's GDP than agriculture, forestry and fisheries combined (Canadian Sport Tourism Alliance, 2019). The tourism and hospitality sector in British Columbia is a significant economic driver, employing approximately 149,900 people in 2019 (Destination BC, 2020). Tourism is an important cornerstone for British Columbia, Vancouver Island, Nanaimo and surrounding communities.

Sport tourism is a unique niche in the Canadian tourism landscape. It accounts for approximately \$7.2 billion CAD annually across Canada, and continues to be the fastest growing segment of the global tourism industry (Sport Tourism Canada, 2021). With thousands of sporting events hosted in Canada annually, communities of all sizes can engage in the growing subsector of sport tourism.

The first year of the COVID pandemic, however, dashed many communities' sport tourism hopes. In 2020, 21 of the 23 major international sport events scheduled to be hosted in Canada were cancelled or postponed. Nearly every community across

the country came to a standstill, shutting down tournaments, competitions, leagues and sport facilities. The pandemic shut down cost the tourism sector more than \$6 billion CAD in 2020 (Sport Tourism Canada, 2021).

Nanaimo's stakeholders recognize the opportunity sport tourism presents and have come together to make it a reality. The Nanaimo Sport Tourism Strategy allows for greater COVID resiliency and quicker bounce back than other tourism subsectors, as the strategy emphasizes COVID-friendly outdoor sport disciplines, as well as "small sport" competitions with single or double competitors (e.g., badminton, fencing, ballroom dancing, etc.). Of all the tourism sectors, sport was one of the last to shut down and was the first to restart.

Benefits to communities engaged in sport tourism are well-documented, ranging from youth development and physical health and well-being to economic development, job creation and infrastructure investment for local community use. The Nanaimo Sport Tourism Strategy aims to deliver on all of those benefits for the community, and leave a legacy for years to come.

Approach / Methodology

This project was designed to be a collaborative process with stakeholders in the Nanaimo tourism community, including the Nanaimo Hospitality Association, Tourism Nanaimo, the City of Nanaimo, event organizers, venues and local sports organizations. The project was divided into five (5) key phases spread over an initial 13-month period, with each of these activities refreshed every one- to two-years:

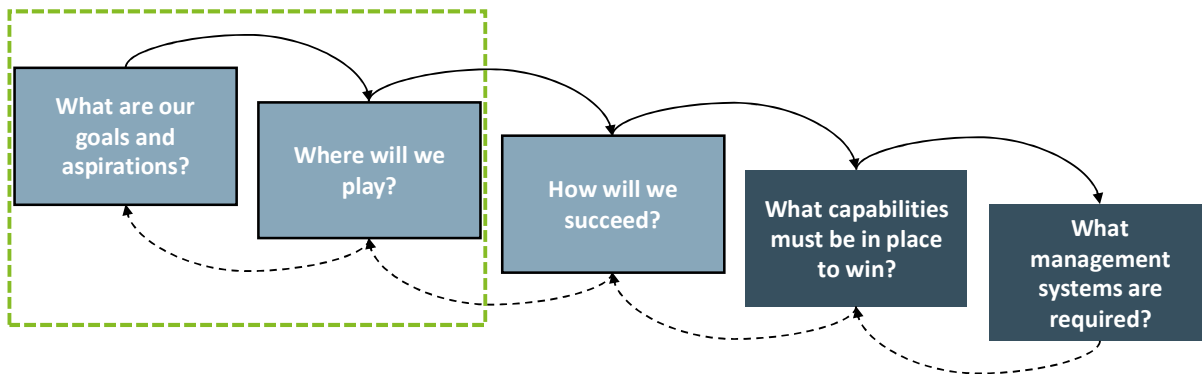
- **Information Gathering** – Literature review, Web research, stakeholder interviews, venue research, and a survey of local sport organizations;
- **Analysis and Findings** – Stakeholder Interview Findings, Local Sport Organization Survey Findings, Sport Venue Inventory and Analysis, Industry Trends Analysis, SWOT Analysis¹, PESTEL Analysis², etc.;

¹ SWOT Analysis describes a framework for analyzing internal **S**trengths and **W**eaknesses of an organization and the external **O**pportunities and **T**hreats.

² PESTEL Analysis is a framework developed by Michael Porter for the analysis of macro-environmental factors > **P**olitics, **E**conomy, **S**ocial, **T**echnology, **E**nvironmental, **L**egal.

- **Steering Committee Workshops #1 and #2** – Current State Assessment and Strategy Review, respectively; and,
- **Recommendations and Final Report.**

The framework within which this project was executed is “*The Cascade of Strategic Choices*” – an approach to strategy development, with this project focusing on “Nanaimo’s goals and aspirations as a sport tourism destination” (Lafley, A.G. and Roger L. Martin, 2013).



Strategic Analysis > Industry Scan

The industry scan component of the strategic analysis involved the review and analysis of a large amount of industry data and secondary research. Please note that this scan took place in October 2018 and was refreshed in early 2022. The scan identified industry and market trends affecting the sport tourism subsector in Nanaimo and more globally. A summary of the key findings are as follows:

- **Broadening the definition of Sport Tourism** > The definition of sport tourism has expanded beyond sport competition, to also include mass participation sporting event; sport-related festivals; ancillary events to a sporting event and sport-related business meetings, and high-performance training facilities. Broadening the definition of sport tourism to be more inclusive of the above will create new opportunities for Nanaimo not previously identified;
- **Evolving technical requirements and stringent COVID protocol** > Technical requirements for the sport, the facility infrastructure, equipment, and provision of services (including digital content production and distribution) are evolving rapidly, putting additional pressure on host cities, funding partners,

event organizers and host facilities to deliver more with less. In addition, consistent and quality application of COVID protocol is central to event and community safety;

- **Viewing sport as an experience and not an event** > Sport tourism is no longer about hosting technical competitions, but is about creating an emotional experience through sporting events and local tourism products. The idea is to expand beyond the competition and engage fans and participants in all the host city has to offer before-, during- and post-event;
- **Broadcast savviness, even for local / regional amateur sport events** > As COVID protocol restricted venue capacity and spectator comfort to take in live sport events diminished, many sport event owners that shifted focus to online production and streaming of their sport events rather than in-person viewing fared well during the pandemic;
- **Increasing sport event owner expectations of host city** > Sport event owners have higher and higher expectations of host cities, as desired benefits and outcomes (e.g., sponsorship valuation) increase. The need to demonstrate greater value and return on investment (ROI) is putting pressure on host cities and event organizers to “professionalize or fail” when it comes to bidding and hosting sporting events;
- **Multi-year hosting contracts** > Sport event owners are looking for more consistency and stability in their event hosting calendar, also pushing for greater host city experience and familiarity with their events by asking host cities and sponsors to commit to a single event over multiple years. Most often, the event hosting expectation is three events hosted over six to ten years;
- **Developing an ecosystem of partners** > Host cities are no longer able to deliver a sporting event without the support of industry partners. To better align for success and to respond to the increasing complexity of events, host cities and sporting event organizers will have to put more time and effort into developing and maintaining a strong ecosystem of partners in order to bid for and execute an event successfully; and,
- **Focusing on sustainability and civic duty** > The demand for sustainability, socially, fiscally and environmentally, is pushing host cities to reassess sporting event structure, facilities, operations and event execution. A short-term

investment to align event formats and delivery partners to the values a community stands behind can increase event success and long-term sustainability (e.g., co-hosting an event with a local community organization / charity).

Strategic Analysis > Current State Assessment

In parallel with the review of current trends and leading practices, interviews, surveys, workshops and document reviews were conducted to provide greater insight into the current state of sport tourism in Nanaimo. The Current State Assessment was carried out by aggregating the findings from the Sport Venue Inventory and Analysis, SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats), and PESTEL Analysis (Political, Economic, Social, Technological, Environmental, Legal).

The Current State Assessment highlighted the following themes:

Stakeholder Interviews > Following feedback from stakeholder interviews and a review of key documentation, the following themes emerged regarding the “current state” of sport tourism in Nanaimo:

- Nanaimo is a great place to work and live;
- Outdoor attributes and climate distinguish Nanaimo from other destinations;
- The community is heavily engaged in sport and / or recreational activity;
- Nanaimo has a nice cluster of sporting facilities, creating a multi-sport hub;
- A strong coalition of community of stakeholders is driving sport tourism;
- Demonstrated commitment and investment to long-term facility improvement;
- Varying sport tourism priorities among stakeholders and decision makers;
- Role clarity improving and tourism governing bodies better aligning in Nanaimo;
- Centralized point of contact for all things sport in Nanaimo to soon be defined;
- Multi-year sport tourism vision / target events strong for the Nanaimo Region;
- New sports / franchises in town adding to capacity and expertise in community;
- Good range of sport facilities and many recent facility upgrades;
- Room for ongoing facility investment and upgrade (new and existing);
- Limited facility capacity and / or number of facilities ready for elite competition;



- Limited volunteer capacity amongst the local sport organizations;
- Finite budget / resources amongst other industry stakeholders to focus solely on sport tourism; and,
- Divided community interests around sport.

Sport Venue Inventory and Analysis > Nanaimo is rich in venues, however many of the venues are not suitable for competition beyond their current competition and community use. Venues that are competition-ready are at or are very near capacity.



Survey of Local Sport Organizations > A survey soliciting feedback about sports, sporting events, venues, accommodations and sport-related services in Nanaimo was sent to 129 contacts in the Nanaimo sport community. Of the 129 contacts, 44 organizations responded, with 34 of those respondents completing the survey in full. A second edition of this survey is currently in-progress (April 2022).



The survey highlighted key findings that reinforced the themes from the stakeholder interviews, site visits and documentation review:

- The organizations representing the 29 sports indicated that, collectively, they participate in more than 6,310 competitions or league games outside of Nanaimo and 3,895 competitions or league games hosted in Nanaimo annually (during a typical non-COVID year). These numbers demonstrate a significant opportunity for sport tourism in Nanaimo;
- More than 2/3 of the respondent sport organizations would be interested in hosting provincial-level competitions, with 1/4 expressing interest in hosting national- or international-level competitions;
- Local sport organizations interested in hosting events cite i) lack of funding; ii) lack of sport venue capacity, and iii) limited volunteer capacity as their top three (3) barriers preventing them from hosting;
- Of the 29 sports surveyed, only three (3) indicated having a formalized partnership with local hotel / accommodations providers. Those three (3) sports are badminton, canoe / kayak and squash; and,
- When asked about what hotel / accommodation providers could do to appeal more to sport teams and event organizers (aside from lowering nightly rates), the top four (4) responses given were:
 - i. Room prices that includes breakfast;
 - ii. Shuttle to and from BC Ferries / sport venue;
 - iii. Facilities for group gatherings, meetings and team meals; and,
 - iv. Equipment storage / dry room.

SWOT Analysis > The following is an abridged version of the Strengths, Weaknesses, Opportunities and Threats of the sport tourism subsector in Nanaimo:

Strengths

- City of Nanaimo Parks, Recreation and Culture is a pivotal stakeholder and advocate for sport tourism, festivals and events in the region
- City of Nanaimo staff have depth of experience hosting sport events
- City of Nanaimo committed to a community-led approach through Reimagine Nanaimo

- Nanaimo Hospitality Association and the Tourism Nanaimo have partnered to support a destination sales position including sport, meetings and conferences
- Mayor and Council showing alignment and continued support for investment in local recreation infrastructure (indoor and outdoor)
- City of Nanaimo have committed to Accessibility and Inclusiveness, supporting numerous initiatives that help improve accessibility in the region
- Tourism Nanaimo in the process of being formalized, led by strong leaders from the tourism sector in Nanaimo
- Snuneymuxw First Nation actively supporting and hosting Indigenous sport events (regional / provincial)
- Collaborative group of community organizations and stakeholders working together to proactiveness drive sport tourism in Nanaimo (e.g., Tourism Networking Group)
- Vancouver Island University is a post-secondary institution that lends additional financial, political, infrastructure, accommodations and people support to sport tourism
- Good amenities and some notable sport facilities (public and private) throughout the region (e.g., Stadium District, McGirr Sport Complex, etc.)
- Strong experience and knowledge of sport competitions and hosting in the region
- Strong investment in sport infrastructure (e.g, Serauxman Stadium, Stevie Smith Bike Park, etc.)
- Central location that is an affordable destination

Weaknesses

- Nanaimo's citizens, community associations, local sport organizations and private sector stakeholders have varying opinions of Nanaimo's brand is as a destination – Reimagine Nanaimo and Tourism Nanaimo branding exercise supporting improvement in brand alignment
- Need for centralized contact for sport tourism (e.g., facility booking could require individual contact with district school boards, university, public and private venues) – in progress
- Nanaimo has not recently had a defined vision for sport tourism in terms of the specific sport disciplines or events to target and invest in



- People capacity / volunteer burnout and facility capacity were the top constraints to the successful implementation of a sport tourism strategy for the region just prior to the COVID shutdown
- No centralized volunteer database specifically for sport tourism (i.e., a volunteer base that goes well beyond the Nanaimo Ambassadors Program)
- Sport tourism in the region is underutilizing the potential volunteer base from Vancouver Island University programs (e.g., Parks and Recreation Management or Tourism programs)
- Nanaimo is unaccustomed to approaching event rights holders through the lens of long-term investment in relationships and sport development in the region
- Bylaws mismatch strategic objectives in tourism (e.g., use of waterfront)

Opportunities

- Well-situated mid-island and very accessible by land, air and water
- Supportive airport authority to the tourism strategy in the region
- Great natural geography and climate
- Affordable tourism destination
- Nanaimo sport tourism priorities aligned with BC and Federal government investment priorities (e.g., access to the outdoors / trail infrastructure, accessibility / adaptive sport)
- Located in proximity to Victoria and Vancouver, creating opportunities for “event spillover”, exhibition games, acclimatization, etc.
- New leadership among major stakeholders could be an opportunity to overcome previous barriers to adoption of major initiatives, capital investments and policy changes and provide a “fresh set of eyes” around the opportunity of sport tourism
- New leadership across multiple stakeholder organizations is creating new opportunities for sport tourism and renewed energy for investment
- City is in a good position to make capital investments from a debt-service ratio perspective up to ~\$20M
- First Nations interested in capital projects and initiatives that would spur economic growth and support youth development



- Strong relationships and engagement with the BC Government and tourism-related Ministries
- New hotel(s) to increase hotel capacity and renew region's offering
- Ministry of Advanced Education and Skills Training investing in job creation programs specifically related to accessibility assessments of outdoor and trail infrastructure in the region

Threats

- Misaligned interpretation of sport tourism among stakeholders
- Long process for land acquisitions / designation
- Community resistance to major capital investment of public funds in sport
- Some high schools have been closed, removing facilities from use and thus reducing capacity for sporting events and putting more pressure on other facilities
- A number of facilities need notable upgrades or maintenance, including Vancouver Island University facilities, curling centre, etc.
- Vancouver Island University is limited in its facilities and relies heavily on partnerships / City of Nanaimo / public-private partner-owned facilities
- Resource constraints / people capacity in Parks, Recreation and Culture exacerbated by past City hiring freeze
- Visitors favouring destinations that are able to offer "local experiences" or those with stronger product development and offerings
- Local sport organizations are familiar with hosting smaller technical events, but not with delivering "event experiences", "events as entertainment", or major international events (single- or multi-sport)

PESTEL Analysis > In assessing the environment within which Nanaimo and the sport tourism subsector operate, several key findings emerged within the six (6) PESTEL categories, including:

Political

- Previous lack of centralized governing body for tourism in the region caused delays in the adoption of sport tourism as a strategy
- Multi-faceted nature of tourism requires multiple central government ministries (i.e., tourism, sport, education, heritage, culture, natural resources, etc.) and different levels of government to collaborate (i.e., provincial and federal)
- Supportive Mayor and Council has created new opportunities for sport and infrastructure investment in Nanaimo
- Industry is heavily reliant / affected by whichever political party is in power at the provincial level
- Nanaimo and Province's interest in Indigenous economic development and youth engagement could create additional opportunities for an Indigenous-focused sport tourism strategy
- City of Nanaimo and the Snuneymuxw First Nation are working together and engaging on a number of areas of mutual interest (including sport)

Economic

- Strong business case for infrastructure investment, upgrades and maintenance in Nanaimo
- Strong private sector investment partners like Petroglyph Development Group
- Region having difficulty attracting and retaining employees in tourism due to high housing prices and COVID recovery
- Talent attraction is limited by lack of industry diversification – difficult for spouses to find jobs
- Citizens demanding more fiscally-responsible infrastructure investments and event spending
- Significant funding opportunities related to accessibility, infrastructure improvements, and Indigenous sport / community development

Social

- Nanaimo, its citizens and its stakeholders have disparate perspectives on what Nanaimo's brand is as a City (not only from the tourism sense) and how to live it day-to-day, but are working towards common intersection through Reimagine Nanaimo
- Sporting events and participants more open to new sports, sporting event formats and equipment innovations
- Sporting event organizers find greater event success when event is tied to a social cause (e.g., Ride to Conquer Cancer)
- Opportunity to attract a target demographic through sporting events that aligns to the desired demographic for the city
- Homelessness and "tent city" have negative repercussions on tourist perception of the city, particularly since both are concentrated into the downtown core
- Participants and spectators are still hesitant about "high-traffic" in-person sport events
- Heightened importance around meaningful engagement with Indigenous communities, partnership and community-led approaches to sport
- Commitment to Truth and Reconciliation calls to action #87-91 as it relates to sport and sport event hosting

Technological

- Innovation in sport is creating new opportunities for sport tourism, yet challenges for those destinations struggling to keep pace with industry disruption (i.e., new ways to present sport, adoption of new biometric security at events, COVID protocol, etc.)
- Sporting event owners have heightened expectations of host city and event organizer relative to exponential technology, data, data privacy and their application to a sporting event
- Media content production and distribution platforms are changing how content is consumed
- Greater demand for "live streaming" and packaged content
- Sponsors expecting more precise data and metrics for end-to-end consumer engagement (e.g., consumer attraction to event through ticket purchase through onsite engagement, etc.)
- Expectation for "system-wide" alignment relative to COVID protocol and requirements (e.g., federal vs. BC vs. Alberta vs. Air Canada vs. venue vs. event all having different requirements, mandates and protocols is frustrating for participants, spectators, coaches and officials)



Environmental

- Consumer consciousness and the environmental practices of a sporting event can make or break an event
- The push for the environmental sustainability of an event is opening new opportunities for event sponsors and partnerships
- Knowledge of permitting for natural resources, land use and waterways is invaluable to outdoor infrastructure development in sport tourism
- Heightened importance of outdoor infrastructure and trail networks during- and post-COVID
- Sport events leaning towards formal and public commitments to the UN Sustainable Development Goals and climate action initiatives (and expecting the same of host destinations)
- Nanaimo and area forests are a big feature in mountain biking videos and still photos – the region cannot control logging activity, however, therefore not being able to control the quality of the “full” trail network and outdoor tourism product

Legal

- Canada is one of the most “closed” countries for visitor entry for tourism – with only four (4) countries with a heavier administrative process to gain access as a tourist
- COVID regulations for foreign entry into Canada is constantly evolving and inconsistently applied depending on port or arrival (e.g., city or town and also by land, by air, or by sea)
- Canada’s SafeSport movement is putting much more pressure on sport organizations, municipal recreation departments and sport event hosts to create a SafeSport environment for all athletes, in addition to being fully trained and SafeSport compliant in matters of policy, governance or operations
- “Shared economy” platforms like Airbnb and Uber have local policy makers and regulators stumped – “Enforce or help the economy innovate?”

One could summarize from this strategic analysis that:

- Nanaimo is a small community with unique characteristics and amenities that could support a robust portfolio of sporting events;
- A sport tourism strategy in Nanaimo would need to be tailored to i) what is currently possible within the present infrastructure and facilities, ii) what could

be possible with some dedicated effort and small changes, and iii) what could be possible with additional capital planning, in order to maximize the potential for long-term sustainability and success;

- Nanaimo sport tourism stakeholders will need to focus heavily on relationship building and cross-collaboration to mitigate risk and uncertainty post-COVID, but also to build a sporting event portfolio with annual, bi-annual and quadrennial potential across multiple sports;
- Success of the sport tourism strategy will be contingent upon the ability of the Nanaimo Hospitality Association, Tourism Nanaimo, the City of Nanaimo and all major sport stakeholders to build capacity in the community (e.g., facilities, volunteers, sponsors, etc.) and remove barriers to event bidding and event execution; and,
- Nanaimo is well-positioned geographically to be a convenient “spillover” location for spectators, participants, officials, coaches and administrators of major events in Victoria and Vancouver.

Sport Tourism Strategy Options

This strategic analysis supported the assessment and informed the evaluation of 15+ sport tourism strategy options. Overall, there is consensus that Nanaimo wants to continue what is already going well – the base sports – or those school / team sports that are common in a youth sport setting. This is what is implied when the strategy states “Build Off the Base”. Six (6) additional options were felt by stakeholders to be best-aligned with the objectives of the region from a tourism, sport, social and economic development perspective. These strategy options are presented below:

<p style="text-align: center;">Sport Tourism Strategy Option #1</p> <p style="text-align: center;"><i>Indigenous Sport</i></p>	<p>Indigenous Sport is a strategy option wholly-aligned with British Columbia’s Aboriginal Sport, Recreation and Physical Activity Strategy and the Truth and Reconciliation Calls to Action #87-91. The goal of this event strategy would be to support youth development and help improve the health outcomes of Indigenous People in BC and from across Canada through these events, by facilitating access to sport and recreation opportunities. This strategy would embrace and celebrate the First Nations culture</p>
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	<p>and communities locally, while also positioning Snuneymuxw First Nation as a leader in BC and Canada in the domain of Aboriginal Sport. An example of an event that would fit into this category is the BC Indigenous Provincial Soccer Championships or Junior All Native Tournament for basketball.</p>
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<p>Sport Tourism Strategy Option #2 <i>All Things Cycling</i></p>	<p>The City of Nanaimo, Tourism Nanaimo, Tourism Vancouver Island and public and private partners actively invested in and built up a physical infrastructure in and around various cycling disciplines. In addition, destination tourism organizations across BC and Vancouver Island have been actively investing in cycling as a “target leisure segment”. Cycling disciplines (as identified and recognized by the International Cycling Union (UCI)) include Indoor Track Cycling, Mountain Biking, Cyclo-Cross, BMX, Road Cycling (UCI, 2018). An example of an event that would fit into this category is the BC BMX Championships.</p>
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<p>Sport Tourism Strategy Option #3 <i>Paddle Sport</i></p>	<p>Paddle Sport is defined as any sport involving the propulsion of a watercraft by means of a paddle. Sports that fall into this category include kayaking, canoeing, stand-up paddle boarding, and dragonboat, as examples. Nanaimo is ideally situated on the Georgia Strait with Nanaimo Harbour and Departure Bay offering several sheltered inlets. Nanaimo and region are also teeming with lakes and rivers with a commitment to future Canoe-Kayak infrastructure. An example of an event that would fit into this category is the ICF Canoe Masters Marathon World Cup.</p>
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<p>Sport Tourism Strategy Option #4 <i>Individual / Small Sport</i></p>	<p>Individual or “Small” Sport refers to sport disciplines that engage individual or small teams of competitors. Core sports in Nanaimo, for example, may include team sports like baseball, hockey, basketball, volleyball, and lacrosse. An individual or small sport may be more along the lines of curling, badminton, fencing, combat sports, archery, weightlifting, or cross fit. Individual or small sports typically require smaller competition spaces. An</p>
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	example of an event that would fit into this category is the FIE Fencing Grand Prix.
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<p>Sport Tourism Strategy Option #5</p> <p><i>Adaptive Sport</i></p>	Adaptive sport refers to disability sport or para-sport events or competitions for persons with disabilities (mobility, sensory or cognitive / neuro-diverse). Some sport disciplines may fall within the paralympic qualification system, while others may be test events by the sport event rights holder to broaden exposure to the sport, participant base, etc. An example of an event that would fit into this category is the World Championships for Blind Sailing.
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<p>Sport Tourism Strategy Option #6</p> <p><i>Sport Business</i></p>	With close to 65 National Sport Organizations in Canada and an equal number of Provincial Sport Organizations in BC, the number of "sport-related events" that take place in the Province of BC annually is sizeable. Each of these organizations hosts anywhere from 1 – 50 events a year, including Annual General Meetings, member summits, coaches' conferences and clinics, officials (e.g., umpires / referees) meetings, commission / special committee meetings (e.g., Safety Committee), and coaching clinics, just to name a few. These events can be offered as an "add-on" to an existing sporting event or competition and / or as a stand-alone event. An example of an event that would fit into this category is the Baseball Canada Annual General Meeting.
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Recommendations

In September 2018, these six (6) strategy options were presented to the Nanaimo Hospitality Association, Tourism Nanaimo and the City of Nanaimo. The pros and cons were assessed and the implementation considerations reviewed.

In June 2021, the Nanaimo Sport Tourism strategy options were presented to the City of Nanaimo Governance Priorities Committee meeting. The following recommendations were made for the proposed vision for sport tourism in Nanaimo:

Indigenous Sport – This is a "must do" strategy option. The potential community benefit is high and potential for long-term legacy is high. This option builds on and contributes to existing tourism offerings in cultural and Indigenous tourism. Given

the strong interest in infrastructure investment and programming, this strategy option is recommended for the mid-term.

All Things Cycling – This strategy option presents the largest opportunity for a long-term sustainable sport tourism strategy in Nanaimo. This strategy plays on the climate and natural environment of Nanaimo and region. While limited infrastructure and ongoing trail development could be an obstacle for particular disciplines, any investment in cycling infrastructure will benefit all tourism subsectors and local community sport organizations and user groups. This strategy option can be implemented immediately, with the potential to build a larger cycling event portfolio mid- and long-term.

Paddle Sport – Paddle Sport is another sport tourism strategy option that crosses over between cultural tourism, Indigenous tourism, recreation and leisure tourism and sport tourism. Existing infrastructure and facilities along the waterfront are presently a barrier to hosting competitions. Investment in Nanaimo’s paddle sport infrastructure along the waterfront would contribute to the overall success of tourism in the region, while also creating a legacy for community user groups and residents. For this reason, Paddle Sport would be considered a mid-term sport tourism strategy.

Individual / Small Sport – Individual / Small Sport is an exciting sport tourism strategy option, because it offers a high level of flexibility in terms of the timing of the competitions, the demographic of competitors and the size of the required venues. Among all the “non-core team sports”, it is recommended to focus on fitness events (e.g., Olympic Lifting or Cross Fit) and combat sports in the short-term. This is a strategy that can be acted upon immediately.

Adaptive Sport – Creating an accessible and inclusive community is at the heart of Reimagine Nanaimo and the commitments the City has shown through various initiatives and investments. Investment in accessibility, in both built and outdoor recreation infrastructure and spaces, demonstrates a commitment to healthy living for all citizens of Nanaimo. Adaptive sport adds an additional layer, promoting healthy living and an event pathway to take part in participatory or competitive adaptive sport competitions. Nanaimo’s climate positions Nanaimo favorably to become an adaptive sport hub.

Sport Business Events – This option is a quick win and has the lowest barriers to immediate implementation. Numerous facilities exist in Nanaimo to host events like Annual General Meetings and coaches’ conferences. These events create an interesting opportunity for sport development, as local coaches and athletes could engage with technical sport experts and leaders that they may not have otherwise. Events can be targeted for desired shoulder season and off-season dates.

Other > Multi-Sport Games or USport – Through ongoing discussion with community stakeholders, the recommendation for a multi-sport games and USport championships was made. Nanaimo would be able to host either or both type of events in the next 3-5 years, with the endorsement and support of Vancouver Island University.

Other > Victoria / Vancouver Spillover – This is an opportunistic strategy that takes advantage of Nanaimo’s proximity to Vancouver and Victoria, by creating an exhibition, acclimatization or host environment that is less expensive and less distracting for athletes and officials than some of the alternatives. These types of opportunities have already come to fruition with the World Junior Hockey Championships and subsequent exhibition games played in Nanaimo. This trend can continue with more directed efforts towards relationship building and product development in the region.

Implementation Timeline and Next Steps

Implementing the Nanaimo Sport Tourism Strategy can commence immediately. In reviewing the six (6) strategy options, the following timeline has been proposed for the next five (5) years with the number and type of sporting event recommended.

	Year 1	Year 2	Year 3	Year 4	Year 5
Indigenous Sport	1	1	1	1	1
All Things Cycling	1	1	2	2	3
Paddle Sport	-	-	-	1	-
Individual / Small Sport	1	1	2	2	2

Adaptive Sport	-	-	-	1	1
Sport Business Events	2	2	3	4	4
Multi-Sport or USport	-	-		1 x USport Championship	1 x Multi-Sport Event
Victoria / Vancouver Spillover	1	1	2	2	3
TOTAL	6	6	10	14	15

The total number of events listed by year are those that can be planned and budgeted for (within the currently defined budgets). Additional opportunities could be considered on an ad hoc basis, pending available budget and resources to support the event. It is recommended to review this strategy annually.

For this strategy to be successful, additional action items have been identified and grouped into the following buckets:



Some of the key next steps proposed for the successful implementation of this strategy are as follows (*please note that the full list of next steps can be found in the detailed report):



Preparing for success in 2030 begins now, with a keen eye on local sport organizations and their interests, local community needs, and planned infrastructure development. The partners involved in the preparation of this sport tourism strategy are confident that this will set Nanaimo off on the right foot and help the community emerge as a confident and experienced sport host destination in Canada.

APPENDIX: NANAIMO SPORT TOURISM

Strategic Analysis and Sport Tourism Strategy

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Introduction / Context

Worth \$1.53 trillion USD in global revenues, tourism is undoubtedly a power house industry. It accounts for approximately 10% of the World's GDP and is responsible for 1 in 10 jobs (UNWTO, 2017). It is the World's fifth fastest growing industry, with approximately 1.32 billion tourists engaging in destinations and tourism experiences Worldwide in 2017 (TIAC, 2018).

In 2017, tourism in Canada represented more of Canada's GDP than agriculture, forestry and fisheries combined with \$97.4 billion CAD in economic activity. It is an important cornerstone of the Canadian economy, comprised of more than 200,000 businesses employing more than 1.8 million Canadians (TIAC, 2018).

Sport tourism is a unique cross-over sector between i) Tourism, ii) Technology, Media and Entertainment, and iii) Consumer Business and Industrial Products. In Canada, sport tourism is the fastest growing segment of the Canadian tourism industry³, generating approximately \$7.5 billion CAD annually (Canadian Sport Tourism Alliance, 2017).

Canada as a nation ranks sixth (6th) in SportCal's Global Sports Impact Nations Index⁴ dropping two positions from the 2017 ranking (SportCal, 2018). Thousands of sporting events are hosted in Canada annually, ranging from local recreational events to major international single- and multi-sport competitions. The increasing number of sporting events globally is creating endless opportunities for Canadian communities of all sizes to engage in sport tourism.

Nanaimo is one such community. With a temperate climate year-round and a community heavily engaged in leisure activity and organized sport, Nanaimo hosts several events at the local, provincial, and national levels. Sport and tourism are an integral part of the fabric of Nanaimo and surrounding communities.

Spearheaded by the Nanaimo Hospitality Association (NHA) and in partnership with the City of Nanaimo and Tourism Nanaimo, the region seeks to establish a presence in the Canadian sport tourism market. The NHA invested in this project to conduct a

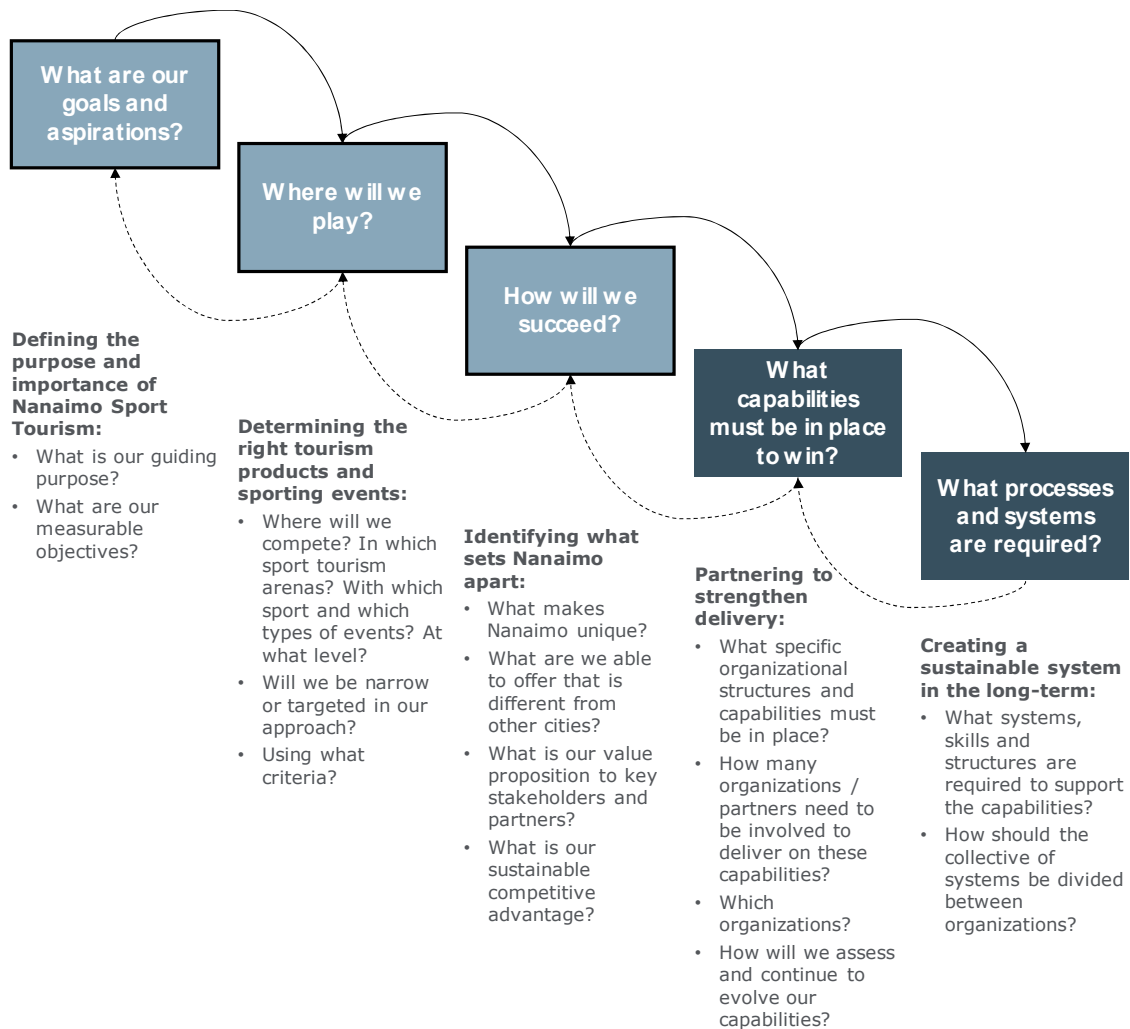
³ Please note that the Canadian Sports Tourism Alliance defines the Canadian Sport Tourism industry as the total value of the number of people / trips taken by to attend a sporting event as a spectator and / or to play in a sporting event, as an individual or team, hosted in Canada.

⁴ The GSI Nations and Cities Index is based on in-depth analysis of major multisport games and world championships over a rolling 14-year period, covering seven years in the past (including the current year) and seven years in the future. In total, 88 nations and 587 cities have hosted, or are scheduled to host events during this period. Bids awarded up to and including 2 April 2018 have been included in the April 2018 index.

strategic analysis of sport tourism in Nanaimo and develop a realistic sport tourism strategy that would be suited to the region’s present economic and political climate. The investment in this project demonstrates an interest in developing a sustainable economic growth strategy, while showcasing Nanaimo as an emerging community in the Canadian sport tourism market.

Approach / Methodology

The development of the Nanaimo Sport Tourism Strategy was undertaken between November 2017 and December 2018, using the *Cascade of Strategic Choices* as the framework (Lafley, 2013):

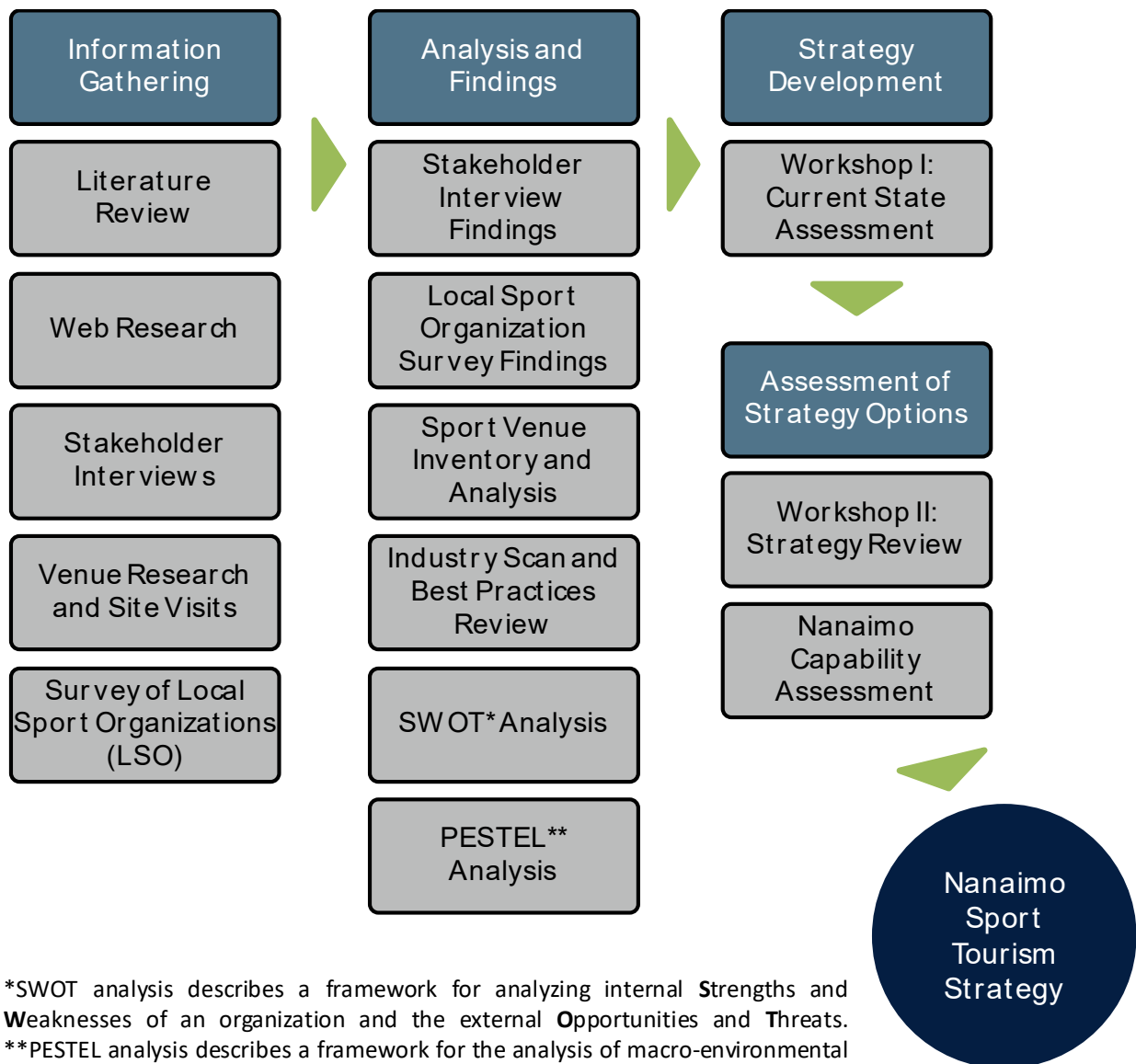


The development of the Nanaimo Sport Tourism Strategy focused primarily on the first and second cascades:

- What are Nanaimo’s goals and aspirations relative to Sport Tourism?
- Where will Nanaimo play in the sport tourism sector?

The third cascade – “How will Nanaimo succeed in the sport tourism sector?” – is addressed in the *Recommendations* section of this report.

The approach / methodology employed to develop the Nanaimo Sport Tourism Strategy included:



*SWOT analysis describes a framework for analyzing internal Strengths and Weaknesses of an organization and the external Opportunities and Threats.

**PESTEL analysis describes a framework for the analysis of macro-environmental factors > Politics, Economy, Social, Technology, Environmental, Legal.

For more detail on the approach, please refer to Appendix 1 – List of Interview Participants / Consulted Stakeholders; Appendix 2 – Survey of Local Sport Organizations; and, Appendix 3 – List of Identified Sports and Survey Participants.

Strategic Analysis > Industry Scan

The strategic analysis carried out in this project employed several tools to assess the current “sport tourism environment” in which Nanaimo operates today. The goal was to evaluate opportunities and challenges faced by Nanaimo and region and use this analysis to guide sport tourism strategy options and recommendations.

The tools used during this strategic analysis to assess the sport tourism sector include:

- **Definition of Sport Tourism** > A scan across industry and key stakeholder groups to gauge alignment in their definition of sport tourism, and to concretely define “Sport Tourism” in Nanaimo’s context;
- **Industry Trends and Leading Practices** > A review of major industry trends and leading practices that affect the competitiveness of one host city over another, and how these trends are influencing sport and fan expectations of a host city;
- **Host City vs. Sporting Event Expectations** > The identification and articulation of (through first-hand experience and trends analysis) the expectations a sporting event could have of a host city, based on the type and size of the event, and the maturity, experience and tourism product offering of the host city.
- **Categorization of Sporting Events** > The definition of sporting event categories as a framework to further analyze opportunities in the sport tourism sector. This approach helps isolate specific opportunities by event type, size, or some other characteristic.

This high-level assessment of the sport tourism sector in Nanaimo and in Canada will allow Nanaimo to best assess how to uniquely position itself relative to competing destinations.

Definition of Sport Tourism

According to the United Nations World Tourism Organization (UNWTO), tourism is articulated as “the movement of people for personal or professional purposes

outside of their “usual environment”⁵. This definition has evolved from the previous definition of tourism of “individuals who have travelled more than 50km with at least one (1) overnight stay...”. This new definition recognizes the benefits of overnight visitors, weekend excursionists, residents and non-residents alike visiting from local through international destinations.⁶

The Canadian Sport Tourism Alliance defines sport tourism more specifically, stating “sport tourism is any activity in which people are attracted to a particular location as a sport event participant, an event spectator, or to attend sport attractions or sport-related business meetings” (*Canadian Sport Tourism Alliance, 2017*).

For the purposes of this analysis and strategy, the definition of sport tourism provided by Canadian Sport Tourism Alliance (CSTA) has been applied. This definition has been further expanded for the purposes of this strategy to identify categories within sport tourism:

1. **Sport competition** – organized competitions in the form of matches, league games, tournaments, etc., that are sanctioned by a local, provincial or national sport organization or some other recognized sport governing body (e.g., Softball BC U14B Women’s Provincial Championships);
2. **Mass participation sport event** – organized events that are open to the public for registration, where the goal is participation, community, or health and wellness (e.g., Silly Boat Regatta);
3. **Sport-related festivals** – festivals that promote community gathering and engagement in and around a sporting event. Such festivals could have multiple objectives, including increasing attendance at sporting events, drawing more tourists to a community during a sporting event, creating opportunities for community health and wellness by adding on a mass participation event, and / or using the sporting event as a platform for another cause (e.g., Dragonboat Festival);
4. **Ancillary events and sport-related business meetings** – meetings and events that run alongside a sporting event or independently that have some sort of tie or affiliation to sport (e.g., BC Hockey Annual General Meeting, Rowing Canada Aviron Coaches’ Conference).

⁵ UNWTO Definition of Tourism: “Tourism is a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes. These people are called visitors (which may be either tourists or excursionists; residents or non-residents). Tourism has to do with visitor activities, some of which involve tourism expenditure.” (UNWTO, 2014)

5. **High-performance training facility** – While being the least intuitive related to sport tourism (as it is not an event, festival or sport business-related meeting), high-performance training facilities bring athletes, coaches, officials and support staff to a single geographic location for discreet periods of time or in permanence.

For more information on the different types of sporting events (i.e., subcategories or types of events within each of the groupings listed above), please see the *Categorization of Sporting Events > Event Classification* section below.

Industry Trends and Leading Practices

The sporting event landscape has changed considerably over the past few decades and continues to evolve at a rapid pace. With the proliferation of the number of sports / disciplines, types of events, number of events and the ever-changing conditions within which sporting events operate, sporting event owners and host cities have greater demands placed upon them than ever before.

For all the above-stated reasons, cities across North America have adopted a more strategic approach to sport tourism, particularly event bidding and hosting. It is no longer feasible to take on a sporting event without careful consideration for host city capacity and capabilities, facilities, financial investment, government support, environmental sustainability, legacy and anticipated benefits in the long term.

Some of the emerging trends in sport, sport tourism and events that are adding to the complexity of sport event bidding and hosting include, but are not limited to:

1. **Sport as an experience** – Traditionally, hosting a sporting event has been straightforward > gather volunteers, select an appropriate venue, register teams / athletes and officials, organize accommodations, and carry out the event. Sporting events have evolved significantly since, with an emphasis shifting to “sport as an experience”. Organizers are being asked to create engaging experiences for the athletes, coaches, officials, volunteers, spectators and the community-at-large through the event. This approach to sport increases event complexity, namely in the areas of event delivery, media, broadcasting, sponsorship, marketing, and fan and community engagement.
2. **Evolving technical requirements** – Facility infrastructure and capital investment takes years, sometimes decades to plan for. Sport, sport regulation and facility requirements are evolving at a pace much greater than the pace of facility maintenance and upgrade. This evolution is placing pressure on communities to make additional investment in

facilities, when existing facilities do not meet provincial-, national- or international-event standard.

3. **Facilities, infrastructure, and the stadium of the future** – With a strong emphasis on fan experience both inside and outside of the stadium, host cities and sporting event owners are looking for new and innovative ways to create beautiful, safe, engaging spaces, while also encouraging function, fiscal responsibility and long-term legacy. Exponential technology like wearables and the internet of things (IoT) is changing how event organizers can engage with fans and leverage facilities to enhance that experience.
4. **Digital media and distribution of content** – New distribution models such as on-demand and live web streaming are adding to the mounting pressures on amateur sport and sporting events. Video production and live broadcast, albeit a foundational component of professional sporting events, is not commonplace in the amateur sport world. Event organizers are now being asked to incorporate live web streaming, broadcasting and video production into standard event operations. This is a relatively new demand for the amateur sport world and is a capability that will have to be invested in and developed.
5. **Fan engagement through augmented reality (AR) and virtual reality (VR)** – Fan engagement during game time has evolved more rapidly than ever before. With the ability to select camera angles, control replays, and consume data, analytics and online content through the second-screen experience are paramount; fans can engage in sporting events through more channels and formats than ever before. These advancements are pushing host cities, sporting event owners and media and broadcasting partners to think outside the box in terms of sport and host city presentation.
6. **Boosting physical security** – Traditionally, event security has been synonymous with the physical safety and security of venues, fans and athletes. While many communities shrug off the topic, sport federations and event owners are placing higher and higher demands on event organizers to keep safety and security top of mind. Event organizers are being asked to respond to and ideally prevent security issues pre-, during- and post-event. This increase in demand and sophistication of security services is also pushing event organizers to strengthen connections and ways of working with local law enforcement, security services, and first responders.

7. **Ecosystem development** – A sport ecosystem refers to the supporting industries and services that contribute to successful event bids and event hosting. Destination Marketing Organizations (DMOs) and sporting events alike are having to put more time and effort into developing and maintaining relationships and partnerships in their communities. The capabilities and capacity of a DMO can be stretched if unprepared. Approached strategically, and DMOs can thrive and create a competitive advantage by fostering and maintaining a strong ecosystem of partners.
8. **Sport as a political tool** – Event funding and capital investment for facilities can be highly politicized, but is a critical component of sport and sport tourism. The fragmented nature of tourism requires government ministries and agencies at all levels to work together and collaborate in new ways. From economic development to education to natural resources to indigenous affairs to transportation and the arts, host cities and sport event organizers and the event overall would benefit from dedicating resources to public policy review, government lobbying, relationship management and stakeholder engagement.
9. **More agile governance and operating models** – In a fast-paced world where technology, trends and consumer preferences can change overnight, organizations are interested in keeping pace by creating more agile governance, decision-making structures, operating and funding models. Decisions regarding small capital investments or large infrastructure builds can require months, or even years of escalations and approvals. Red tape and subsequent delays in timelines could ultimately be a deterrent for sporting event owners seeking host cities.
10. **Social impact and civic duty** – Social impact is a burning topic for athletes, fans, sporting events, and venues. Gone are the days of irresponsible actions around people, finances, the community and the environment. Sporting events have become a platform to support and advocate for causes and for the host communities. Bid cities may miss out on several opportunities, including fan engagement, ticket sales and TV / online spectatorship, if their social impact strategy is ignored. Similarly, citizens from the host cities may resist plans for proposed sporting events if it is felt that the events would do a disservice to the community.

In response to these trends, host cities such as Nanaimo need to ask themselves a series of critical questions and realistically evaluate their ability to both bid for and host a successful event. These trends should help shape a host city's sport tourism

strategy, pushing host cities to assess their governance structures, operating models, partnerships and supporting capabilities.

Host City vs. Sporting Event Expectations

Before assessing any host city’s approach to sport tourism, it is imperative to identify and articulate the expectations of both sporting events and host cities. Expectations are numerous, but not static. Each event brings a different set of expectations based on the type and size of the event and the maturity, experience and “product offering” of the host city, etc. Practically speaking, hosting a local ultimate frisbee tournament for a weekend comes with a different set of expectations than hosting the IIHF World Junior Hockey Championships.

In the case of Nanaimo, industry norms and leading practices were assessed to devise a list of expectations sporting event owners will have of host cities, and vice versa. These expectations were identified through leading practice research and interviews and act as an input to the development of the Nanaimo Sport Tourism Strategy:



Categorization of Sporting Events

Sporting events can be categorized in numerous different ways, including segmentation by type of event, scope and prestige, size/complexity, location, policy and bidding process. These categorizations help guide the direction of any destination’s sport tourism strategy and focus resources to maximize the ratio between bid submissions versus successful bids.

The most common categorizations are by “event classification / ownership” and by “type of event”.

Event Classification / Ownership

Events are typically classified into four “levels” ranging from local to international events. “Local / Regional” versus “International” refers specifically to the level of the governing body or the event owner in the broader sporting event ecosystem.

Event classification does not often correlate with the number of events, the size of the events or even the foreseen economic benefits. A world championship event with a smaller pool of athletes, for example, may generate less economic benefit than a provincial hockey tournament with a greater number of athletes. The classification may have a direct correlation, however, to visitor perception of the city, media draw, ticket sales, etc.

As a host city progresses from local / regional events to national and international events, required capabilities around brand, transportation, sponsorship assets and rights management, media and broadcasting, security, and operations protocol will become much more important.



International – Examples: Olympic / Paralympic Games, PanAm Games, World Championships, Continental Cups organized / owned by the International Olympic Committee, International or Continental Sport Federations, or private event owners like Red Bull.

National – Examples: Canadian Figure Skating Championships, Canada Games, Canadian Rugby Championships organized / owned by National Sport Organizations or event owners like the Canada Games Council.

Provincial – Examples: BC Lacrosse Championships, BC Hockey Selection Camps, or BC Games organized / owned by Provincial Sport Organizations or event owners like the BC Games Society.

Local / Regional – Examples: Memorial Cup Golf Tournament, BC Junior A Lacrosse League, Island Football League, Island Track & Field Meets, Silly Boat Regatta, high school.

Types of Sporting Events

Categorizing events can also be done by defining the “type of sporting event”. Examples include, but are not limited to:

- Mega-Events – Multi-Sport (e.g., Olympic Summer Games, Pan Am Games)
- Mega-Events – Single-Sport (e.g., FIFA World Cup, NCAA March Madness)
- Multi-Sport Games (e.g., X-Games, Canada Games)
- Single-Sport Leagues (e.g., Western Hockey League (WHL))
- Single-Sport Championships (e.g., CIS Women’s Basketball Championship)
- Training / Evaluation Camps (e.g., Junior Women’s Softball Evaluation Camp)
- Development Courses (e.g., International Coaching School, NCCP)
- Conferences (e.g., Canadian Sport Leadership Conference)
- Festivals (e.g., Nanaimo Dragonboat Festival)
- Professional Sporting Events (e.g., PGA Champions Tour)
- Cause-Related / Fundraising Events (e.g., Run for the Cure, MS Walk)
- Showcase Events (e.g., Red Bull Crashed Ice)
- Grassroots Events (e.g., Brown Cup for Rowing)
- One-Off / Single Participation Events (e.g., Tough Mudder, Foam Fest)

Note: High-Performance Training Centres that have a year-round, physical presence in a community and require facilities and infrastructure to maintain operations are not listed as part of the *Types of Sporting Events*, however they are noted as one of the four subcategories within sport tourism.

Summary of Findings from Industry Scan

The industry scan component of the strategic analysis for sport tourism in Nanaimo involved the review and analysis of a large amount of industry information and secondary research. This industry scan allowed for key themes to emerge and a view of the context within which Nanaimo would operate as a sport tourism destination. A summary of the key findings are as follows:

- **Definition of sport tourism** > The definition of sport tourism has expanded beyond sporting events to include i) sport competition, ii) mass participation sporting event; iii) sport-related festivals; iv) ancillary events to a sporting event and sport-related business meetings, and v) high-performance training facilities. Broadening this definition will create new opportunities for Nanaimo that would not have been assessed under the previous definition;

- **Increasing expectations of sporting event owners on host cities** > Sporting event owners have higher and higher expectations of host cities, as the metrics (e.g., sponsorship valuation) increase. This is putting pressure on Host Cities and event organizers to “professionalize or fail” when it comes to bidding and hosting sporting events;
- **Sport as an experience** > Sport tourism is not longer about hosting a technical tournament, but is about creating an emotional experience and developing local tourism products that encourage fans and participants to engage in the sport and the Host City before-, during- and post-event;
- **Evolving technical requirements** > Technical requirements for the sport, its equipment and facilities (including digital and media distribution) is evolving rapidly putting additional pressure on governance structures, decision-making processes, event organizers and host facilities, and Host City capital investment strategies;
- **Ecosystem development** > Host cities are no longer able to deliver a sporting event without the support of industry partners. To better align for success, Host Cities and sport event organizers will have to put more time and effort into developing and maintaining a strong ecosystem of partners, in order to bid for and execute an event successfully; and,
- **Social impact and civic duty** > The demand for socially responsible sporting events is pushing Host Cities to reassess event structure (e.g., co-hosting an event with a local community organization / charity), operations and event execution to increase event success and long-term sustainability.

Strategic Analysis > Current State Assessment

Interviews, workshops and document reviews were conducted in parallel to the external industry scan to provide greater insight into the current state of sport tourism in Nanaimo.

Different approaches were applied to assess the current state, including the external scan, document review, stakeholder interviews and local sport organization survey. The *Current State Assessment* summarizes the findings from the stakeholder interviews and Local Sport Organization Survey, as well as the findings from the Sport Venue Inventory and Analysis, SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats), PESTEL Analysis (Political, Economic, Social, Technological, Environmental, Legal), and a Capability Assessment.

Sport Venue Inventory and Analysis

Pre-empting the development of a sport tourism strategy was the need to conduct an analysis of the existing sport venue inventory in Nanaimo and thus their capacity and readiness to host a sporting event. Efforts were undertaken through interviews, site visits, and document collection and review to identify relevant sport venues in the region and assess them for the purposes of sport tourism. Venues researched included higher-capacity conference facilities and multi-sport complexes to local community centres, parks and privately-owned facilities.

Overall, Nanaimo appears to be well-equipped with outdoor facilities that have the potential for future growth and development. Many indoor facilities are geared towards community use and are not fully-equipped to host larger events. Nanaimo does possess a few facilities that hold promise for multi-sport use, but additional capital investment would be required to balance increasing technical requirements for events and the capacity requirement for community use.



Stakeholder Interview Findings

At the onset of this project, interviews were limited to six (6) individuals in the Nanaimo sport tourism community. As interviews commenced, it was soon realized that a much broader group of stakeholders should be consulted to create a well-rounded perspective that represented a broad set of opinions and interests relative to sport tourism in Nanaimo.

In total, 14 structured interviews were conducted over a seven-month period (November 2017 through May 2018) and 12 other community stakeholders were consulted through an unstructured meeting format. Stakeholders consulted represented sports, tourism, economic development, hotels / accommodations, public / private venues, transportation providers, event owners / organizers, school

districts, post-secondary education, the City of Nanaimo and the Regional District of Nanaimo.

Following feedback from stakeholder interviews and a review of key documentation, the following themes emerged regarding the current state of sport tourism in Nanaimo:

- Misaligned definition of sport tourism;
- Lack of vision and event targets for the Nanaimo Region;
- Outdoor attributes and climate distinguish Nanaimo from other destinations;
- Need for a centralized point of contact for “all things sport” (in progress);
- Role confusion among governing bodies in the Nanaimo Tourism sector;
- Strong partner relations and cooperation are a driving force for sport tourism in the region;
- Limited number of competition-ready facilities and facility capacity;
- Limited “people capacity” among organizations in sport tourism; and
- Divided community interests around sport.

While these results do not cover the full scope of the feedback, it is believed that these are the themes that should most importantly inform the proposed operating model, possible approaches to the implementation of the operating model, and future sport tourism strategy for the region.

1. ***Misaligned definition of sport tourism*** – Divergent perspectives exist among stakeholders regarding “what is sport tourism?” and “what activities make up sport tourism?”. Some of the various interpretations of sport tourism shared by stakeholders in Nanaimo included:

- Competitive sporting events that draw participants or spectators from out-of-town location to Nanaimo;
- Any sport-related activity that attracts overnight visitors to Nanaimo;
- Competitive sporting events and / or peripheral events (e.g., coaching conference or festival) hosted in Nanaimo; and,
- All events hosted in Nanaimo that promote healthy and active lifestyles, including leisure and recreation activities, mass participation / recreational events, and competitive sporting events at all levels.

A consistent and well-understood industry definition is critical to the definition and successful execution of a sport tourism strategy, complete with key performance indicators.

2. ***Lack of vision and event targets for the Nanaimo Region*** – The vision of sport tourism for Nanaimo and area, or rather a lack thereof, was cited most commonly as a challenge for the region.

The vision refers to “where we will play”. Most simply, which definition(s) of sport tourism does Nanaimo want to adopt, and within those definitions, are there specific sports and / or events that should be targeted.

While Nanaimo continues to host several sporting events at all levels in absence of an articulated vision, absence of a clear vision and strategy is hindering the economic development of the City. While Nanaimo could continue to have some sport tourism success with a passive approach, the greatest amount of growth will come from targeted marketing efforts, targeted investment in facilities and infrastructure, and unified resource allocation among stakeholders.

(For a list of sporting event types that could be targeted as part of a sport tourism strategy, please refer to *Industry Scan > Categorizing Sporting Events > Types of Sporting Events*).

3. ***Outdoor attributes and climate distinguish Nanaimo from other sport tourism destinations*** – Throughout stakeholder interviews, it was mentioned time and time again that Nanaimo was a great place to live and to play because of the geography, climate and “beautiful outdoors”. Great terrain developed trail systems, breathtaking ocean vistas and freshwater lakes; there seemed to be no end to the examples of noteworthy locations in and around Nanaimo for sport and recreation activities.

While other areas of the country may boast similar attributes geographically, the unique combination of ocean, lakes, terrain and climate creates a distinctive advantage for Nanaimo relative to other destinations. Nanaimo could use this uniqueness to its advantage by creating a Sport Tourism Strategy that plays to the region’s strengths.

4. ***Limited number of competition-ready facilities and facility capacity*** – One comment emerged from each stakeholder interview relative to facilities; it was noted that Nanaimo has a limited number of competition-ready facilities, and that the facilities that exist within the community are at or near capacity. Creating event-ready facilities through minor upgrades and supporting long-term capital investment in sport facilities is critical to the short-, mid- and long-term success of any sport tourism strategy for the City of Nanaimo.

Current and future facility use, availability and capital investment will be a key consideration when determining the appropriate Sport Tourism Strategy for Nanaimo.

5. ***Lack of centralized point of contact for all things sport*** – Several stakeholders in the City described instances of “lost sport tourism and event opportunities” because of a lack of a central point of contact for sport. The City of Nanaimo is one channel for facility inquiries, but has limited visibility to Vancouver Island University (VIU) or private facilities. Grants and funding opportunities are dispersed across several organizations. Marketing of the region and events could be directed to any of the stakeholder bodies. And finally, email inquiries and ultimately “the face of Nanaimo” is dispersed between stakeholders, including Tourism Vancouver Island (representing Tourism Nanaimo), the Nanaimo Hospitality Association, the Nanaimo Conference Centre and the City of Nanaimo.

Creating a central point of contact for sport among the Sport Tourism stakeholders in Nanaimo can only improve the overall customer service provided to sporting event organizations and promoters (internal and external to the City). In addition, funneling all sport host requests through one channel will improve the overall coordination and collaboration between stakeholders and increase the likelihood of sporting events selecting Nanaimo as a host city in future.

6. ***Role confusion among governing bodies in the Nanaimo Tourism sector*** – *Lacking* a central point of contact for sport tourism in Nanaimo is merely a symptom of the role confusion that exists in the sport tourism sector. With the dissolution of the Nanaimo Economic Development Corporation and the former DMO Tourism Nanaimo, roles and key activities for sport tourism lead generation, marketing, funding, bid support and event operations support have been difficult to maintain. Couple this with leadership changeover from the 2018 election and one could estimate that the sport tourism sector and tourism more broadly in Nanaimo has been negatively affected.
7. ***The potential negative consequences of leadership changeovers in tourism, sport tourism and the City are offset by strong partner relations*** – The dissolution of various governing bodies in Nanaimo (e.g., Tourism Nanaimo and Nanaimo Economic Development) was mentioned repeatedly throughout the interviews. Past events like the dissolution of major governing bodies and agencies, to senior management attrition at the City, to rapid changeover of City officials, and 2018 elections, Nanaimo and the governing bodies of the Tourism industry have been disrupted significantly.

This degree of change has been managed and mitigated by the passion and determination of several community leaders and partners who have banded together to keep things in tourism and sport tourism moving. While not perfect, the relationships between senior leaders within the community have helped advance the development of a new governance and operating model for tourism in Nanaimo, as well as the development of this Sport Tourism Strategy.

8. **Organizations supporting sport tourism in Nanaimo have little to no "people capacity"** – This theme was strongly emphasized during stakeholder interviews, highlighting a serious risk to the long-term sustainability and success of a sport tourism strategy. Whether referring to Vancouver Island University, CSI Pacific, Tourism Nanaimo, the Nanaimo Conference Centre, the City of Nanaimo or local sport organizations and event organizers, each organization clearly stated that more people resources were required to add sport tourism into their portfolios.

For those organizations that are volunteer-driven, concerns around "finding new volunteers" or "burning out their existing volunteer base" were raised. For those organizations with operating budgets, a willingness to lobby for and earmark funds to increase "people capacity" could be made.

"People capacity" will be a key consideration when evaluating Nanaimo Sport Tourism Strategy options, as any option selected will not be successful without appropriate resourcing to carry it out.

9. **Divided community interests around sport** – One of the most interesting themes that emerged from interviews and community stakeholder consultations was the notion that there could be "opposing factions" and divisive viewpoints relative to sport, preferred leisure activities, facility use and investment of tax payer dollars in sport in Nanaimo.

While it is not uncommon for opinions to differ around use of tax payer dollars and capital investment, it was surprising to note how active and vocal community associations in Nanaimo have been, stepping up to voice concerns around new sport facilities like the Nanaimo Multi-Plex Arena.

Nanaimo's residents also appear to be divided in their preference between team sport (typically the spectator sport) and individual sport for competition and leisure (less spectator-friendly). Take ice hockey for example; hockey is a "staple" team sport for youth and adults in Nanaimo. Not only is it popular in terms of community participation, but a case could be made for the entry

of a Western Hockey League (WHL) professional team into the Nanaimo market or the investment into new facilities.

Individual sports (for competition or leisure) like mountain biking, trail running, rock climbing and triathlon, however, are contrary to the “team sport” culture in Nanaimo. There could be overlap between the two, but evidence suggests that “protect the outdoors and natural landscape” versus “build new, state-of-the-art sport facilities” creates a pretty deep and possibly insurmountable rift in the Nanaimo community. As such, much care and consideration must be given to the options within the proposed Nanaimo Sport Tourism Strategy to engage in options that would attract participants and support from all corners of the community.

Each of the major themes emerging from stakeholder interviews and the document review offered important insight that guided the development of the Nanaimo Sport Tourism Strategy.

Local Sport Organization Survey Findings

As part of the project, a survey was developed to gather feedback from the local sport organizations in Nanaimo. A local sport organization, in this case, is defined as a club, association or private business that could be involved in endorsing and / or organizing a sporting event in and around Nanaimo.

The survey was sent to 129 contacts in the Nanaimo sport community. The intent of the survey was to seek input from local sport organizations in the Greater Nanaimo Region regarding sports, sporting events, venues, accommodations and sport-related services in and around Nanaimo. Results helped inform the strategy options presented in this report, but also – ideally – would help guide future investment decisions in sport and sport tourism in the region.

When we look at the breakdown of sports represented among the respondents, a few key sports are missing (based on known participation rates and / or presence in BC). Of the 104 identified sports / sport disciplines in Canada, 58 of them have a known presence in Nanaimo. Of the 58 sports, representatives from 29 of them responded to this survey.

Survey Respondents represent...

29 sports **4300+**
athletes, coaches
and officials **34** sport
organizations



**Competitive
and recreational
sport** **Single and multi-
sport activities** **ALL** age
categories

A total of 34 sport organizations from the 29 sports completed the survey in full. The response rate for this survey was 25.6%, which is an above-average response rate for external stakeholder surveys (Fryrear, 2018).

More than half of the local sport organizations surveyed (~60%) indicated that they represent more than 100+ members registered with their organization, and many of those with programs spanning across U12 – U19.

The survey highlighted some key findings that reinforce the themes that emerged from stakeholder interviews, site visits and documentation review:

1. **Participation** > Among the 34 sport organizations:
 - They participate in 6,310 events⁷ collectively annually (total);
 - Total number of events per year (training camps, league games and competitions) averages 186 per organization;
 - More than 1,512 of these sporting events take place on Vancouver Island (outside of Nanaimo), averaging 44 per organization; and,
 - 648 events take place off Vancouver Island, averaging 19 events per organization.

Insight #1: There are a lot of sporting events (almost 2000) being hosted on and off Vancouver Island, outside of Nanaimo, that could attract more overnight visitors to the region.

2. **Current Hosting** > Among the 29 sports and 34 respondent sport organizations:
 - A total of 3,895 local / regional sporting events are hosted in Nanaimo each year, averaging 115 events per sport organization; and,

⁷ A sporting event is defined, for the purposes of this report, as any organized event such as a tournament, league game, or conference, that is sport-related.

- 140 provincial and 2 national sporting events are hosted in Nanaimo annually.

Insight #2: The total number of events highlighted in the survey is much higher than the number anticipated at the onset of this analysis. It highlights a further need around the transparency and coordination in the sport and sport tourism communities to better support event hosting and presentation of Nanaimo as a tourism destination.

3. **Future Hosting** > According to the sport organizations surveyed:
- 26 of 30 would like to host "Nanaimo participants only" events;
 - 27 of 32 would like to host regional events;
 - 23 of 29 would like to host provincial⁸ events;
 - 9 of 25 would like to host national events, while 8 are unsure; and,
 - 3 of 24 would like to host international events, while 9 are unsure.

Insight #3: The local sport organizations that participated in the survey are keen to host sporting events in the future. More interestingly, the number of organizations that could be open to hosting national, international and ancillary events presents a major opportunity for sport tourism in Nanaimo.

4. **Ancillary Events** > Ancillary events are considered "non-competition, sport-related events", such as a coaching course or Annual General Meeting. According to the sport organizations surveyed, more than half of respondent sport organizations have considered hosting an "ancillary event", such as an NCCP clinic or officiating course, etc.

Insight #4: With more than 65 national sport organizations across Canada, each of which host dozens of "overnight" events per year, Nanaimo has an opportunity to attract a good number of overnight visitors in the shoulder and off-seasons.

5. **Interest in Future Hosting** > Among the respondents that answered "unsure" to hosting national or international events, the following sports were represented:

- | | |
|-----------------|----------------------|
| - Track & Field | - Lacrosse |
| - Swimming | - Baseball |
| - Gymnastics | - Soccer |
| - Badminton | - Ice Hockey |
| - Squash | - Fastpitch Softball |

⁸ Provincial event refers to a sporting event that draws participants from all around BC. These events could be Provincial Sport Organization events or invitational / open events.

When asked about perceived barriers to hosting, these ten (10) sports identified their top four (4) barriers as (in order):

- Not enough funding to cover event cost;
- Not enough capacity in the current sport venues / facilities;
- Not enough capacity in local hotels / accommodations; and,
- Not enough volunteers or limited capacity of volunteers.

Insight #5: Five (5) individual sports and five (5) team sports identified a potential interest to host national- and / or international-level competitions in the future. This represents a significant opportunity to increase the number of overnight visitors to Nanaimo and region, provided the sport tourism bodies in the region can help reduce or overcome the perceived barriers to hosting.

6. **Hotel Partners** > Of the 34 respondents representing 29 sports, only three (3) indicated having relationships or formalized partnerships with local hotel / accommodations providers. Those three (3) sports are badminton, canoe / kayak and squash.

When asked about what hotel / accommodation providers could do to be more appealing to sporting events and teams (aside from lowering rates), the following responses were given by more than one participant:

- Willingness to take team bookings / attitude towards teams
- Room price that includes breakfast
- Managing sporting event / team bookings as an event
- Shuttle to and from BC Ferries / sport venue
- Facilities for group gatherings, meetings and team meals
- Equipment storage / dry room
- Healthy / athlete-oriented breakfast options
- Late checkout / early check in

Insight #6: The Nanaimo Hospitality Association could impact on the "quality of stay" of sport event participants. Incorporating these services into the hotel offering also creates an opportunity for hotels to distinguish themselves from other hotels / accommodation providers in the region.

For a full list of identified sports, sports with a known presence in Nanaimo, and sports represented in the survey responses, please see Appendix 3 – List of Identified Sports and Survey Participants. For a copy of the survey, please refer to Appendix 2 – Survey of Local Sport Organizations.

SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats)

Throughout the project, information and feedback were gathered to assess the strengths, weaknesses, opportunities and threats of the “sport tourism offering” in Nanaimo. This analysis is representative of the “as-is” state of sport tourism as collaboratively managed by the City of Nanaimo, the Nanaimo Hospitality Association and Tourism Nanaimo. An abridged SWOT Analysis is depicted below. For the full, detailed SWOT Analysis, please refer to Appendix 4 – Detailed SWOT Analysis.

Strengths	Weaknesses
<ul style="list-style-type: none"> • City of Nanaimo Parks & Recreation is a pivotal stakeholder and advocate for sport tourism, festivals and events in the region • Vancouver Island University is a post-secondary institution that lends additional financial, political, infrastructure and people support to sport tourism • Collaborative group of community organizations and stakeholders working together to proactively drive sport tourism in Nanaimo • Good amenities and some notable sport facilities (public and private) throughout the region (e.g., McGirr Sport Complex or Serauxman Stadium) • Central location that is an affordable destination • Experience, knowledge and expertise in sport and sport bidding / hosting strong in the region • Strong investment in unique sport infrastructure (e.g., Stevie Smith Bike Park) 	<ul style="list-style-type: none"> • Management of sport tourism events was previously divided among tourism, sport tourism, education, cultural and economic development organizations • Lack of centralized contact for sport tourism (e.g., facility booking could require individual contact with district school boards, university, public and private venues) • Nanaimo has not previously had a defined vision for sport tourism • People capacity / volunteer burnout and facility capacity are the top constraints to the successful implementation of a sport tourism strategy for the region • No centralized volunteer database specifically for sport tourism (i.e., a volunteer base that goes well beyond the Nanaimo Ambassadors Program) • Sport tourism in the region is underutilizing the potential volunteer base from Vancouver Island University programs (e.g., parks and recreation management) • Bylaws mismatch strategic objectives in tourism (e.g., use of waterfront)

Opportunities	Threats
<ul style="list-style-type: none"> • Well-situated mid-island • Very accessible by land, air and water • Great natural geography and climate • Affordable tourism destination • New leadership among major stakeholders could be an opportunity to overcome previous barriers to adoption of major initiatives, capital investments and policy changes and provide a “fresh set of eyes” around the opportunity of sport tourism • New leadership across multiple stakeholder organizations is creating new opportunities for sport tourism and renewed energy for investment • City is in a good position to make capital investments from a debt-service ratio perspective up to ~\$20M • First Nations interested in capital projects and initiatives that would spur economic growth and support youth development • Strong relationships and engagement with the Ministry of Forests, Lands, Natural Resources Operations and Rural Development (FLNRO) and other Government Ministries re: tourism • Two new hotels to be built to increase hotel capacity and renew region’s offering • Tourism Vancouver Island (acting as Tourism Nanaimo) is strong in product development and is working to incorporate sport tourism into their portfolio 	<ul style="list-style-type: none"> • Unclear / misaligned definition of sport tourism among stakeholders • Long process for land acquisitions / designation • Community resistance to major capital investment of public funds in sport • Some high schools have been closed, removing facilities from use and thus reducing capacity for sporting events and putting more pressure on other facilities • Vancouver Island University is limited in its facilities and relies heavily on partnerships / rental of City of Nanaimo / public-private partner-owned facilities • Visitors favouring destinations that are able to offer “local experiences” or those with strong product development and offerings • Tourism shifting away from destination (i.e., what exists at destination) to product / experience development (i.e., create an experience locally) • Local sport organizations are familiar with hosting smaller technical events, but not with delivering “event experiences” or “events as entertainment”

Based on the SWOT Analysis, one could conclude that Nanaimo's positioning as a sport tourism destination is promising:

- Nanaimo is a great place to work and play, it is centrally-located, easily accessed and affordable;
- Nanaimo's natural beauty, surrounding environment and climate are factors that will distinguish Nanaimo from others as a sport tourism destination;
- Nanaimo possesses a few facilities and some park infrastructure that a sport tourism strategy could successfully be built around; and,
- The City of Nanaimo Parks and Recreation and community stakeholders (e.g., NHA, Tourism Nanaimo, Nanaimo Conference Centre) have done an admirable job stepping up to move tourism in the region forward in absence of a centralized governing body or formalized way of working.

However, the region would benefit from proactively addressing the following threats and weaknesses:

- Nanaimo appears to be grappling with its image and brand as a city;
- Desire for civic pride – population wants to have something to be proud of
- Nanaimo needs vision and direction related to tourism and a formalized way of working to manage opportunities and investments; and,
- A focus on capacity (people / sport venues / hotels) will be necessary to achieve long-term sustainable success in sport tourism.

If addressed, the Nanaimo Sport Tourism Steering Committee could maximize the potential for long-term sustainability and success of sport tourism in the region.

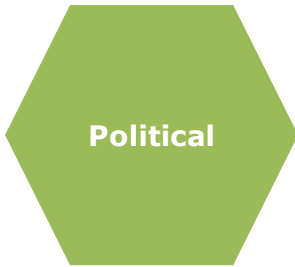
PESTEL Analysis

(Political, Economic, Social, Technological, Environmental and Legal)

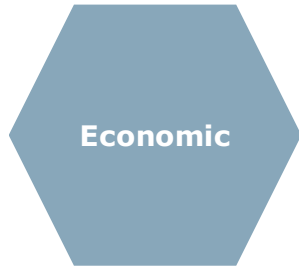
The PESTEL Analysis is the approach selected for this project to assess the environment in which Nanaimo, and specifically sport tourism in Nanaimo, is operating. This perspective is important for assessing the strategic options and as key considerations when designing the implementation plans for the sport tourism strategy.

Questions were tailored for each of the six (6) filters and explored as part of the analysis to spark some interesting insights, including:

- **Political** > What is the political situation in Canada, in British Columbia and in Nanaimo? How could each of these political environments affect tourism and sport tourism in the region?

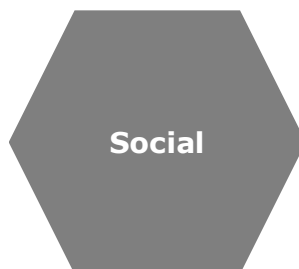


- Previous lack of centralized governing body for tourism in the region caused delays in the adoption of sport tourism as a strategy
 - Industry is heavily reliant / affected by whichever political party is in power at the provincial level
 - Nanaimo and Province's interest in indigenous economic development and youth engagement could create additional opportunities for an indigenous-focused sport tourism strategy
 - Collaboration necessary within region to be successful
 - Community Associations are a strong voice among stakeholders
 - Strong collaboration with First Nations community is important
 - Relationships with private development groups like Petroglyph Development Corporation (PDC) are important
 - High degree of changeover among leadership ranks with the City
 - Destination BC increased funding for tourism product development and capacity building among small businesses and destination marketing organizations across BC
 - Poor marketing, access, and product investment in tourism projects owned by the Federal government (parks, museums, heritage areas) is inhibiting growth in the tourism sector
 - The fragmented nature of tourism requires multiple central government ministries (i.e., tourism, sport, education, heritage, culture, natural resources, etc.) and different levels of government to collaborate (i.e., provincial and federal)
- **Economic** > What are the prevalent macro-economic factors? How are factors such as unemployment rates, migration rates, and labour market participation affecting the industry in the region?



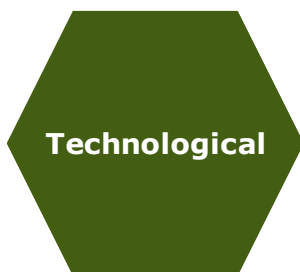
- Strong business case for infrastructure investment, upgrades and maintenance in Nanaimo
- Strong private sector investment partners like Petroglyph Development Group
- Tension between investments in short-term pay-off (event) versus long-term gains (venue and infrastructure)
- Tourism is a direct contributor to and important sector in the economy
- Region having difficulty attracting and retaining employees in tourism due to high housing prices
- Talent attraction is limited by lack of industry diversification – difficult for spouses to find jobs
- Citizens demanding more fiscally-responsible infrastructure investments and event spending
- Canada lifted the Mexico visa requirement
- Low unemployment rate and difficulty recruiting into sector
- Canada taxes tourism products; Tourism is the only export that is not 0% tax
- US-CAD exchange rate enticing Americans to visit
- Travel prices are expected to increase at a faster rate than consumer prices

- **Social** > What is the public's perception of Nanaimo? What factors are influencing that perception? How much importance or influence does popular culture have in the Nanaimo tourism sector? What are its determinants? What are the latest trends that could change consumer behaviour and engagement in the tourism sector?



- Nanaimo, its citizens and its stakeholders have disparate perspectives on what Nanaimo's brand is as a City (not only from the tourism sense) and how to live it day-to-day
- Visitors are demanding experiences over and above traditional product offering
- Sporting events and participants more open to new sports, sporting event formats and equipment innovations
- Sporting event organizers find greater event success when event is tied to a social cause (e.g., Ride to Conquer Cancer)

- Opportunity to attract a target demographic through sporting events that aligns to the desired demographic for the city
 - Notable talent gaps as tourism not viewed as a desirable industry to work in
 - Potential misalignment between target visitor versus the target sport recommended as part of the strategy
 - Homelessness and “tent city” have negative repercussions on tourist perception of the city, particularly since both are concentrated into the downtown core
 - Sport innovation (e.g., creation of new events and event formats) is a key component of “product refresh” and attracting younger audiences
 - eSports and gaming are opening up entire market segments and event opportunities that did not exist ten (10) years ago
 - Demand for new service types and higher service levels at community sport facilities are increasing
 - First Nations facilities are under-utilized
 - VIU student recruitment and demographic trends could influence which sports are attracted to the Nanaimo market
 - Sector trending towards sport and experiential tourism
- **Technological** > What technological innovations are likely to pop up and affect the market structure? Are there any technology trends in sport event bidding and hosting that could affect Nanaimo’s ability to successfully bid and host if the City and its stakeholders do not keep up with the trends?



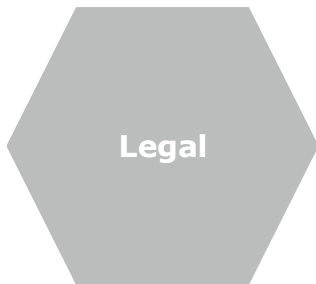
- Innovation in sport is creating new opportunities for sport tourism, yet challenges for those destinations struggling to keep pace with industry disruption (i.e., new ways to present sport, adoption of new biometric security at events, etc.)
- Media content production and distribution platforms are changing how content is consumed
- Increased role of social media in community and political influence
- Social media platforms have opened access to new target markets and demographics
- More consumer data available than ever before

- More technology systems are required than ever before to execute an event
 - Greater demand for “live streaming” and packaged content
 - Online “special interest communities” are exclusive, yet extremely influential among their members, changing how we engage with target audiences
 - Relationship strategies with media are evolving - key influencers and “voices” within “special interest communities” (online or otherwise) are the new media contacts
 - Content production and distribution platforms are changing how content is consumed, and thus the requirements for event organizers to offer “live stream” and packaged content during- and post-event
 - Sporting event owners have heightened expectations of host city and event organizer relative to exponential technology, data, data privacy and their application to a sporting event
 - The “gig economy” and crowdsourced talent has opened up access to specialized skill sets previously not available in smaller markets (thus creating the potential for very creative and distinctive event presentation)
 - Sponsors expecting more precise data and metrics for end-to-end consumer engagement (e.g., consumer attraction to event through ticket purchase through onsite engagement, etc.
- **Environmental** > What are the environmental concerns for the industry? Are there any specific concerns related to sporting events? How can sport hosts respond to these concerns and create a “green sporting event”?



- Low carbon footprints are becoming important for any event operation
- Sporting events seeking alternative products to reduce overall waste (e.g., biodegradable dishes or water distribution without high-waste bottles)
- Consumers conscious of water usage, operational impact on local water sources, and environmental practices of a sporting event overall can make or break an event

- Communities have stricter guidelines and bylaws than ever before
 - Push to be more-environmentally friendly is helping create space in the sporting event ecosystem for new environmentally-sustainable product and service partners
 - The push for the environmental sustainability of an event is opening new opportunities for event sponsors and partnerships
 - Industry toolkits for sustainability of events (financial, social and environmental) are maturing and becoming more accessible to event owners and organizers
 - Environmentally-savvy events are facing less resistance from communities and are able to attract a broader volunteer base
 - Knowledge of permitting for natural resources, land use and waterways is invaluable to outdoor infrastructure development in sport tourism
- **Legal** > Is there any current legislation that regulates the industry that should be taken into consideration? Is there the potential for regulatory changes in future? And if so, how would they impact the tourism sector?



- Canada ranks 120th out of 141 countries for “international openness” (i.e., policies that encourage the entry of foreigners into Canada for tourism or employment)
- There are only four (4) nations without some sort of pre-entry requirements to Canada – this translates to 19-day tourist visa waits for Chinese tourists and 29-day tourist visa waits for Indian Tourists (for example)
- Regulatory environments around “shared economy platforms” like Airbnb are being challenged and banned, creating fewer opportunities for sporting events and shared prosperity in the community
- Internet of Things (IoT), Sensory Technologies and Smart Cities are creating a landscape for rapid proliferation of technology in sports, venues, and supporting infrastructure
- With added IoT and sensory capabilities, big questions are surfacing re: data privacy and data security of athletes, coaches, officials and spectators alike

The findings from the PESTEL Analysis highlight an increasing pace of change in the tourism, sport and sporting event world. Each of the “perspectives” offers insight into potential opportunities and threats that could impact the sector and Nanaimo’s ultimate success in the sport tourism industry. These factors should be taken into consideration when assessing the strategy options and when defining appropriate the implementation approach for the strategy options selected.

Nanaimo Sport Tourism Strategy Options

Objective of Nanaimo Sport Tourism Strategy

When this project commenced, key stakeholders in the Nanaimo sport tourism community articulated their desired outcome for a successful sport tourism strategy in Nanaimo. These desired outcomes ranged from “more heads in beds” to “a greater focus on youth engagement in sport”.

The primary objective of this strategy is “to create a unified and agreed upon vision and approach among tourism stakeholders in the region to target and attract sport-related events and competitions”.

Strategy Design Principles / Evaluation Criteria

Strategy design principles drive the decision-making process behind strategy design, evaluation and implementation. They define the aspirations, priorities, boundaries, and constraints that the strategic options must work within. These design principles can be adjusted and evolve over time, as the needs and priorities of local sport tourism stakeholders also evolve.

Based on the strategic analysis and stakeholder feedback throughout this project, the following statements should be considered as Strategy Design Principles for the Nanaimo Sport Tourism Strategy, guiding options and selection of events:

Economic	<ul style="list-style-type: none"> - Increase hotel occupancy rates /# of overnight guests; - Increase the average length of stay of a visitor; - Create a positive economic impact for the region;
Tourism	<ul style="list-style-type: none"> - Showcase / build on the existing strengths of the region;

	<ul style="list-style-type: none"> - Improve the brand perception of Nanaimo as a tourism destination (as aligned with Tourism Vancouver Island / Tourism Nanaimo marketing strategy);
Financial	<ul style="list-style-type: none"> - Demonstrate “break-even” or “profit” potential; - Demonstrate potential repeatability on an annual, bi-annual or quadrennial basis;
Community	<ul style="list-style-type: none"> - Engage the local community, particularly youth; - Align with Nanaimo’s community values; - Minimize community user displacement; - Not pose unmanageable risk to the community; - Demonstrate universality and promote accessibility; - Discourage prejudice in any way shape or form;
Sport	<ul style="list-style-type: none"> - Contribute to the enhancement of local sport facilities / infrastructure through private or public investment; - Contribute to local athlete / coach development and community programming; - Demonstrate a benefit to local sport groups;
Organization	<ul style="list-style-type: none"> - Increase the capacity of local sport organizations (LSOs), event organizers and stakeholders; - Improve the knowledge, skills and capabilities of volunteers; - Leverage local technical sport expertise; - Demonstrate transparency and accountability;
Environmental	<ul style="list-style-type: none"> - Discourage competitions that require “motorized vehicles” - Prevent / minimize damage or cause harm to the natural landscape and / or “serene environment” of Nanaimo
Political	<ul style="list-style-type: none"> - Be endorsed by the National, Provincial, or Local Sport Organization (LSO); - Encourage collaboration across stakeholder groups and industry subsectors; - Encourage the strengthening Nanaimo’s relationship with the BC Government or other sport / tourism funding partners; and, - Remain neutral of politics.

Sport Tourism Strategy Options

Based on stakeholder feedback and the strategic analysis performed throughout the project, the following six (6) strategic options were presented to the Nanaimo Sport Tourism Executive Steering Committee for consideration (in no particular):

Sport Tourism Option #1 > Indigenous Sport

<p>Description</p>	<p>Indigenous Sport is a strategy option wholly aligned with the Aboriginal Sport, Recreation and Physical Activity Strategy in British Columbia (Indigenous Sport, Physical Activity and Recreation Council (ISPARC), 2018). The goal of this strategy option would be to help improve the health outcomes of Indigenous People from across Canada through these events, by supporting and encouraging physically active communities and by helping expand access to sport and recreation opportunities. This strategy would embrace and celebrate the First Nations Community and culture in Nanaimo, while also positioning Nanaimo as a leader in BC and Canada in the domain of Aboriginal Sport.</p>
<p>Examples of Possible Events</p>	<ul style="list-style-type: none"> - BC Indigenous Provincial Soccer Championships - Indigenous Archery Camp - Provincial Indigenous Swimming Camp - North American Indigenous Games - Masters Indigenous Games
<p>Potential Benefits</p>	<ul style="list-style-type: none"> - Opportunity for collaboration with Snuneymuxw First Nation - Potential for sport / community infrastructure investment - Greater number of funding and grant opportunities - Showcases the rich First Nation culture in the region - Helps develop a distinctive brand for the destination - Encourages local Indigenous community and youth engagement - Contribute to local economic growth and employment in First Nations community

Sport Tourism Option #2 > All Things Cycling

Description	
	<p>The City of Nanaimo, Tourism Nanaimo, Tourism Vancouver Island and multiple private organizations and stakeholder groups have actively built up an infrastructure in and around various cycling disciplines. In addition, destination tourism organizations across BC and Vancouver Island have been actively investing in cycling as a “target leisure segment”. Cycling disciplines (as identified and recognized by the International Cycling Union (UCI)), include: Indoor Track Cycling, Mountain Biking, Cyclo-Cross, BMX, Road Cycling. While there are other multiple sub-disciplines, events will be evaluated within the scope of the disciplines identified above.</p> <p>Indoor Track Cycling: Bicycle racing sport usually held on specially built banked tracks or velodromes (but many events are held at older velodromes where the track banking is relatively shallow). Presently, the outdoor velodrome track in Colwood, BC is only one of two track cycling facilities in British Columbia.</p> <p>Mountain Biking: Sport of riding bicycles off-road, often over rough terrain, using specially designed mountain bikes. Mountain biking can generally be broken down into multiple categories: cross country, trail riding, all mountain (also referred to as "Enduro"), downhill, freeride and dirt jumping.</p> <p>Cyclo-Cross: Races typically take place in the autumn and winter (the international or "World Cup" season is October–February), and consist of many laps of a short (2.5–3.5 km) course featuring pavement, wooded trails, grass, steep hills and obstacles requiring the rider to quickly dismount, carry the bike while navigating the obstruction and remount.</p> <p>BMX: Bicycle motocross or bike motocross, is a cycle sport performed on BMX bikes, either in competitive BMX racing or freestyle BMX. It is essentially stunt riding on rough ground or over an obstacle course.</p>

	<p>Road Cycling: Road bicycle racing is the cycle sport discipline of road cycling, held on paved roads. Road racing is the most popular professional form of bicycle racing, in terms of numbers of competitors, events and spectators.</p>
<p>Examples of Possible Events</p>	<ul style="list-style-type: none"> - Red Bull World Pump Track Championships (https://vancouverisland.ctvnews.ca/video?clipId=1454303) - UCI BMX Freestyle Flatland World Cup - Red Bull Farm Jam (https://www.redbull.com/us-en/farm-jam-2018-video-highlights) - BC BMX Championships - BC Premier BMX Series - Gran Fondo - Hill Climb World Championships
<p>Potential Benefits</p>	<ul style="list-style-type: none"> - Opportunity to create a unique leisure product offering on Vancouver Island as well (e.g., connect South Island to the North Island to the E&N Trail (Victoria to Courtney)) - Leverages existing Stevie Smith Bike Park infrastructure - Strong alignment with tourism product development for cycling - Scalable for local through to international events - Variety of events can be tailored to desired demographic - Long-term potential to build this option out into an X-Games / FISE (Festival International des Sports Extrêmes) style event - Unique opportunity to develop cycling infrastructure in Nanaimo that could attract tourists and encourage viral marketing (e.g., Mirror Park in Pamplona, Spain) (https://www.redbull.com/us-en/videos/mirror-park-action-clip)

Sport Tourism Option #3 > Paddle Sport

<p>Description</p>	<p>Paddle sports are defined as any sport involving the propulsion of a watercraft by means of a paddle. Sports that fall into this category include kayaking, canoeing, dragonboat, stand-up paddle boarding. Nanaimo is ideally situated on the Georgia Strait with Nanaimo Harbour and Departure Bay offering more sheltered inlets. In addition, Nanaimo and region are teeming with lakes and rivers with the potential for Canoe-Kayak infrastructure.</p>
<p>Examples of Possible Events</p>	<ul style="list-style-type: none"> - Tribal canoe races (e.g., Coast Salish Canoe Races) - ICF Canoe Masters Marathon World Cup - Canadian Canoe Slalom Championships - Canoe-Kayak Canada Annual Summit
<p>Potential Benefits</p>	<ul style="list-style-type: none"> - Strong reputation for Dragonboat Festival (international draw) - Aligned with “Indigenous Sport” strategy option - Aligns with / supports Indigenous tourism product development - Showcases the unique geography of the region - Aligns with / supports paddle sport tourism strategy - Supports much needed investment in waterfront infrastructure - Strong potential tie to Newcastle Island development - Aligns with “stay and play” tourism strategy for the region

Sport Tourism Option #4 > Fringe Sports

<p>Description</p>	<p>Fringe Sport refers to a grouping of sport, typically individual or small team sport, that sits outside of the core team sports. Core team sports in Nanaimo may include baseball, hockey, basketball, volleyball, lacrosse. A fringe sport in Nanaimo could include curling, badminton, fencing, combat sports, archery, weightlifting, or cross fit, as examples. These sports typically require smaller competition spaces, allowing sport hosting to take place at a greater number of venues.</p>
<p>Examples of Possible Events</p>	<ul style="list-style-type: none"> - Yonex Canadian Masters Badminton Championships - The Hero Games CrossFit Competition - FIE Fencing Grand Prix - British Columbia Archery Association AGM
<p>Potential Benefits</p>	<ul style="list-style-type: none"> - Creates opportunity for a greater number of venues to be used for event competition - Creates an opportunity to leverage community expertise and build strong connections with that sport (e.g., Nanaimo-based Level 5 Badminton Referee or World-Class MMA Coach) - Potential to shift sport target based on target demographics for Destination BC, TVI or Tourism Nanaimo - Can be leveraged to target event formats that display Nanaimo tourism product (e.g., archery competition with stunning natural backdrop) - Creates agility for the sport tourism strategy, allowing Nanaimo to shift focus based on current trends or target demographics

Sport Tourism Option #5 > Corporate Sport

<p>Description</p>	<p>One of the observations during the strategic analysis was the tension between “the beautiful outdoors” and the industries that co-exists in Nanaimo. This option focuses on an event strategy that would be geared towards corporate / industry participants, rather than on a specific sport.</p> <p>A few different event formats that could be supported under this heading include i) Corporate Adventure Races (e.g., team building or competitions within a single company), ii) Corporate Multi-Sport Games (single or multi-company), or iii) Corporate training events or skills competitions (e.g., Ministry of Forests, Lands and Natural Resource Operations (FLNRO)) using the Nanaimo Motocross Track for heavy machinery training). The intent of “Corporate” was to find a way to embrace both and instill a sense of civic pride around the industry supported by Nanaimo and surrounding area (e.g., First Responders, Forestry, Natural Resources, Search & Rescue, Fisheries, Coast Guard, etc.).</p>
<p>Examples of Possible Events</p>	<ul style="list-style-type: none"> - World Police & Fire Games - Can-Am Police-Fire Games - Military Skills Competition - Trades Training BC - Search and Rescue Training
<p>Potential Benefits</p>	<ul style="list-style-type: none"> - Instill a sense of civic pride regarding local industry - Showcase all aspects of Nanaimo - Supports local economic development initiatives - Potential for return visitors for tourism / leisure - Can build event portfolio in off-season and shoulder seasons

Sport Tourism Option #6 > Sport-Related Ancillary Events

Description	<p>With close to 65 National Sport Organization and an equal number of Provincial Sport Organizations, the number of “non-competition sport-related events” that take place in the Province of BC annually is astounding. Each of these organizations hosts anywhere from 1 – 50 events a year, ranging from Annual General Meetings, Member Summits, Coaches’ Conferences, Officials (Umpires / Referees) Meetings, Commission / Special Committee Meetings (e.g., Safety Committee), and NCCP Coaches courses, just to name a few. These events can be offered as an “add-on” to an existing sporting event or competition and / or be stand-alone events.</p>
Examples of Possible Events	<ul style="list-style-type: none"> - Rowing Canada Aviron Annual Coaches’ Conference - BC Sport Leadership Conference - BC Basketball Official’s Association Conference - NCCP Competition-Development Lacrosse Course
Pros	<ul style="list-style-type: none"> - Can be tailored to hotel occupancy (e.g., offered off-peak) - Does not require the same type of facility to host - Attracts an adult demographic - Potential for “stay and play” - Allows more sport coaches and officials in Nanaimo to participate in development opportunities that previously might have been cost prohibitive (if hosted off-island) - Contributes to the development of local expertise

Recommendations

In September 2018, these six (6) recommendations were presented to the Nanaimo Sport Tourism Executive Steering Committee. The pros and cons were assessed and the implementation considerations reviewed.

The following recommendations were made about each of the proposed strategy options:

Indigenous Sport – This is a “must do” strategy option. There are a lot of considerations and a lot of stakeholders to get on board. This strategy option ties to the cultural and Indigenous tourism for the region and could build on / complement existing tourism offerings. There is great opportunity relative to this strategy option, because it also ties with strategy option of “Paddle Sport”. The recommendation is to pursue this strategy for the mid-term.

All Things Cycling – This strategy option presents the largest opportunity for a long-term sustainable sport tourism strategy in Nanaimo. This strategy plays on the climate and natural environment. It crosses over between recreation and leisure tourism and sport tourism. It is a strategy option that meets many of the strategy evaluation criteria and is sustainable in the long-term. There is strong interest from the stakeholder groups involved, with an acknowledgement that infrastructure upgrades and trail development will be the primary obstacle to the long-term success of this option.

Paddle Sport – Paddle Sport is another important sport tourism strategy option for the region. Nanaimo is known for its climate, beautiful waterfront features and Indigenous culture and traditions. Paddle sport crosses over between cultural tourism, Indigenous tourism, recreation and leisure tourism and sport tourism. Events like Tribal Journeys are cornerstone to the Nanaimo Indigenous youth community and can only be further supported with a Paddle Sport strategy options. The region also hosts a successful Dragonboat festival that has been long standing in the community for more than 20 years, drawing more than 2,000 tourists annually. The development of Newcastle Island presents a great opportunity for paddle sport tourism and for sporting events. While there is interest in paddle sport as a sport tourism option, the existing infrastructure and facilities along the waterfront (e.g., changerooms, etc.) are a barrier to hosting sporting events. For this reason, Paddle Sport would be considered a mid-term sport tourism strategy.

Fringe Sport – Fringe Sport is an exciting sport tourism strategy option, because it offers a high level of flexibility in terms of the time of year of the competitions, the

demographic of competitors and namely, the type and size of the venues required. Fringe Sport as a strategy would allow Nanaimo to build on pop culture trends and evolve as required, with minimal economic impact / facility investment. Among all the “non-core team sports”, it is recommended to focus on Fitness Events (e.g., Olympic Lifting or Cross Fit) and Combat Sports in the short-term. This is a strategy that can be acted on immediately.

Corporate Sport – While this sport tourism option seems like an interesting strategy in principle, sporting events of this nature are abstract and a bit outside of the conventional sporting event format. While this strategy has merit around creating civic pride, engaging the community and local businesses, and contributing the economic development strategy of the region, it was felt that there are other sport tourism strategy options that better meet the needs of Nanaimo. This strategy option could be considered for future, particularly for a targeted multi-sport event like the “Pan Am Police-Fire Games”, but is not presently a priority.

Sport-Related Ancillary Events – This sport tourism strategy option might be the most appealing, as it is a quick win and has the lowest barriers to implementation. Ancillary events such as coach conferences or AGMs can be initiated immediately. The facilities exist all over Nanaimo to host such events. Events can be targeted for desired shoulder season and off-season dates. The entire tourism industry in Nanaimo can work to tailor packages / products for this event type and demographic. This is a strategy option, that while it does not have an immediate “attractiveness for community engagement or entertainment”, it meets all the economic, tourism and sport development objectives.

Other – Throughout the project and review of strategy options, a few other feasible recommendations were made for the Nanaimo Sport Tourism Strategy. The first recommendation is around multi-sport games. It is believed that Nanaimo has the capacity and would have an interest in hosting a multi-sport event in Year 5. Ideally, this multi-sport event would be aligned with one of the other strategy options (e.g., Red Bull Farm Jam). The second recommendation would be a USport Championship, an appealing option with the endorsement and support of Vancouver Island University. And the third recommendation is “Vancouver event spillover”. This is an ad hoc strategy that would encourage Nanaimo’s engagement in Vancouver-based events (e.g., acting as the training base for the Czech and Slovak junior national hockey teams during the 2019 IIHF World Junior Hockey Championship).

Implementation Timeline and Next Steps

Implementing the Nanaimo Sport Tourism Strategy can commence immediately. In reviewing the strategy options and recommendations, the following timeline has been proposed for each strategy option over the next five (5) years:

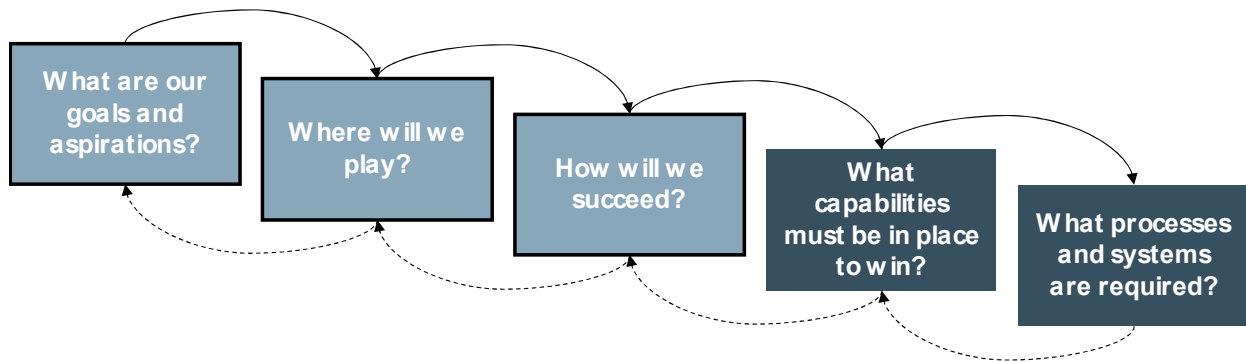
Proposed Implementation Timeline

	Year 1	Year 2	Year 3	Year 4	Year 5
Indigenous Sport	-	-	1	-	1
All Things Cycling	1	1	2	2	3
Paddle Sport	-	-	-	1	-
Fringe Sport	1	1	2	2	2
Corporate Sport	-	-	-	-	-
Ancillary Events	2	2	3	4	4
Other	-	-		1 x USport Championship	1 x Multi-Sport Event
TOTAL	4	4	8	10	11

The total number of events listed by year are those that can be planned and budgeted for. Additional opportunities could be considered, pending available budget and resources to support the event.

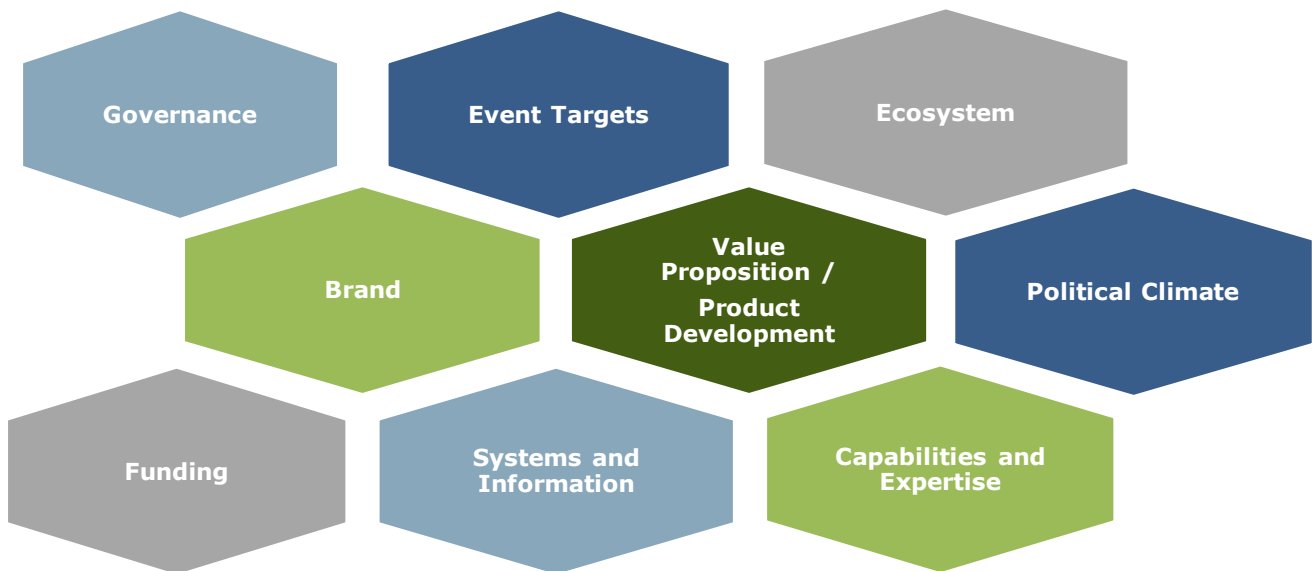
Next Steps: Preparing for Success

For this strategy to be successful, some key actions need to be taken into consideration to work through the Cascade of Strategic Choices:



This strategy has highlighted what Nanaimo’s future goals and aspirations are, as well as six (6) focus areas for the Sport Tourism Strategy.

As the team works to answer additional questions like “What criteria will we use to target and assess potential events?”, “What can Nanaimo offer that makes us unique?”, or “What capabilities must be in place to succeed?”, action items can be grouped into the following buckets:



Key next steps proposed for each of the buckets include:

	Proposed Next Steps
Governance	<ul style="list-style-type: none"> - Develop a high-level roadmap / strategy implementation plan - Identify "next wave" of stakeholders - Develop an engagement approach for key stakeholders - Propose a governance structure for Sport Tourism in Nanaimo, in alignment with City of Nanaimo, Tourism Nanaimo, Tourism Vancouver Island and Nanaimo Hospitality Association mandates - Identify roles, responsibilities and key activities of each organization in the governance structure - Determine decision-making processes between organizations
Event Targets	<ul style="list-style-type: none"> - Identify event selection criteria - Develop a pool of possible sports and events for evaluation - Assess level of NSO, PSO and LSO interest - Assess accommodation, facility, and volunteer capacity - Assess facility readiness for competition - Conduct comparator city analysis by event target (if needed)
Ecosystem	<ul style="list-style-type: none"> - Identify the Sport Tourism Ecosystem in Nanaimo - Assess the stakeholders and identify key leaders - Develop an ecosystem strategy (i.e., required partnerships) - Develop capacity building program for sport tourism partners
Brand	<ul style="list-style-type: none"> - Identify distinguishing characteristics of Nanaimo as sport tourism destination - Develop a "sport tourism event playbook" for bid response - Develop marketing strategy in alignment with event targets - Develop a sport tourism event catalogue (print and online)
Value Proposition / Product Development	<ul style="list-style-type: none"> - Identify sport requirements - Identify sporting event requirements - Develop a "sport tourism product development" program - Design sport tourism product packages by event - Design and conduct a roundtable discussion for the NHA about sport tourism and best practices / trends among sport-oriented hotels / accommodation providers
Political Climate	<ul style="list-style-type: none"> - Assess political stakeholders and influencers in sport tourism - Develop a relationship strategy for each stakeholder - Develop a "sport tourism marketing campaign" for the region

	<ul style="list-style-type: none"> - Continue with the LSO surveys and consultations
Systems and Information	<ul style="list-style-type: none"> - Identify data requirements for ongoing strategic analysis - Develop a collaborative online workspace for sport tourism - Develop a sport tourism venue database – a way to track sport requirements and venue specifications - Develop a database for sport tourism volunteers, technical experts, and local athletes and coaches
Funding	<ul style="list-style-type: none"> - Review existing grant programs and align to strategy - Compile a database of funding and grant opportunities - Develop a Nanaimo Sport Tourism Package for grant applications and funding partners - Conduct a sport tourism asset valuation - Identify / brainstorm potential new assets and develop
Capabilities and Expertise	<ul style="list-style-type: none"> - Conduct a sport tourism capability assessment for Nanaimo - Conduct focus groups with technical experts and volunteers - Identify gaps in the capabilities and who among the ecosystem stakeholders can fill those gaps - Design a capability / skill building strategy for administrators and volunteers - Design and conduct a knowledge transfer forum – roundtable for event organizers and volunteers

Conclusion

Rich in history and traditions, sport is a cornerstone of the Nanaimo community. Both high-performance sport and active living are integral parts of the fabric that make up Nanaimo. The region has been presented with a sizeable opportunity to expand Nanaimo’s tourism portfolio to include sport tourism and make its mark on the Canadian sport tourism landscape.

If Nanaimo invests in sport tourism, will it be a winning strategy? All the facts point to yes. Nanaimo has a strong group of community leaders, a reasonable number of quality sport facilities, a unique set of natural attributes – geographic and climate, a vibrant post-secondary institution and student body, and a strong base of sport enthusiasts, coaches and athletes. Couple this with a \$6.5 billion CAD market in Canada that is the fastest growing segment in tourism, and one could conclude that sport tourism is an investment worthy of exploration (Canadian Sport Tourism Alliance, 2017).

The strategy proposed seeks to build on what Nanaimo naturally offers by focusing on Indigenous Sport, Cycling, and Paddle Sport as three (3) of the six (6) options. The remaining three options aim to maximize facility capacity and usage by targeting sports and sport-related events that could be held at any time of year and could take place in multiple types of facilities.

A critical next step in this strategy will be to develop a strong, yet realistic implementation timeline. Embracing this strategy has the potential to set a new vision for Nanaimo and the sport community, refresh the Nanaimo tourism brand, and create a legacy for generations of athletes to come.

“Strategy is about making choices, trade-offs; it’s about deliberately choosing to be different.” Michael Porter

End Notes

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Appendix 1 – List of Interview Participants / Stakeholders

Name	Organization	Interview	Workshop I	Workshop II	Consultation
Andre Sullivan	(Former) Nanaimo Economic Development Corporation	X			X
Anthony Everett	Tourism Vancouver Island	X		X	
Bill Bestwick	City of Nanaimo – Councillor	X	X		X
Bob Yates	Yates and Associates				X
Calum Matthews	Tourism Nanaimo	X	X	X	X
Dan Brady	Nanaimo Hospitality Association	X	X	X	X
Darsey Batchelor	Tourism Nanaimo	X			X
Dave Ilyn	.		X	X	
Dean Banman	Regional District of Nanaimo	X			
Drew Cooper	Pacific Sport	X			
Elizabeth Williams	City of Nanaimo – Parks & Rec	X	X	X	X
Erralyn Thom	Snuneymuxw First Nation				
Gina Bethell	Vancouver Island Conference Centre	X			X
Heiko Behn	Nanaimo Dragonboat Festival	X			
Henry Traa	.		X	X	
Jake Rudolph	City of Nanaimo – CAO			X	X
Jenn Houtby-Ferguson	Pacific Sport / VIU / Twist Consulting	X			X
John Wilson	Wilson Transportation				
Karen Bannister	Tourism Vancouver Island	X	X	X	X
Keli Mann	(Former) BC Games Society				X
Lesley Anderson	Coffee House Tourism Marketing				X
Mike Wyse	Snuneymuxw First Nation				
Normon Thibault	Front Runners / New Balance	X			X
Patrick Burnham	Mid-Island Velo Association				
Pete Sabo	Nanaimo School District 68				
Richard Harding	City of Nanaimo – Park & Rec	X	X	X	X
Stephanie White	Vancouver Island University	X			
Tracy Samra	(Former) City of Nanaimo – CAO	X			X
Travis Wilson	Wilson Transportation				
Trish Smith	Nanaimo Hospitality Association	X	X	X	X

Appendix 2 – Survey of Local Sport Organizations

Nanaimo Sport Tourism Strategy
Deliverable Briefing for the Steering Committee
Community Sport Organization Survey



Proposed Launch Date:	Monday, February 12, 2018
Proposed Audience:	All community sport organizations / associations (please see attached)
Proposed Close Date:	Wednesday, February 28, 2018
Survey Tool:	Survey Monkey Online Tool

Name of Survey: Nanaimo Sport Tourism – Community Sport Organization Survey

Introduction Message to Participants: _____

WHAT? We are seeking input from community sport organizations in the Greater Nanaimo Region, on behalf of the Nanaimo Hospitality Association (NHA), to provide feedback and input about sports, sporting events, venues, accommodations and sport-related services in the region.

WHY? The Nanaimo Hospitality Association (<http://www.nanaimohospitality.ca>) is a group of Nanaimo-based hoteliers and accommodation providers that are committed to creating outstanding experiences for visitors and guests to Nanaimo. The NHA provides grant funding and support to grow overnight visitation to Nanaimo through the development of festivals and events, including sporting events. The results of this survey will feed into an overarching sport tourism strategy for the region – your voice can help guide future investment into competitions / events for your sport!

WHO? You have been identified as someone who has a direct tie to an amateur sport organization, facility or sporting event in the Greater Nanaimo Region. We are kindly asking 5-10 minutes of your time to provide your input and opinions.

WHEN? This survey is expected to close on **February 28, 2018 at 11:59pm** Pacific Time.

CONFIDENTIALITY and ANONYMITY: The information collected in this survey is strictly confidential and will remain anonymous. This information is being collected and analyzed by Toa Consulting, an independent third-party consulting firm (www.advantagetoa.com). Any information gathered will be aggregated and presented in a summarized format, unless express written permission has been granted. Toa Consulting is committed to protecting your privacy and will not share your information with any third party.

BENEFIT? Your input is important to us. Any feedback you provide could help the Greater Nanaimo Region and its stakeholders steer investments, services and support to better respond to your needs and the needs of your members.

CONTACT: If you have any questions or concerns about this survey, please contact admin@advantagetoa.com.

Proposed Survey Questions:

- 1) Name:
- 2) Which organization / sport do you represent?
(If multiple sports, please take the survey specifically for one sport. If you wish to take the survey again for a second sport, you are welcome to do so.)
- 3) I am ELECTED – APPOINTED – VOLUNTEER and PAID - UNPAID
- 4) How many members (e.g., athletes / coaches / officials) does your organization represent?
- 5) Which age groups does your organization provide programs for?
U10, U12, U14, U16, U18/19, U23 (Junior), Senior, Masters, Senior Masters
- 6) Which sport facilities / venues does your organization use in the Greater Nanaimo Region throughout the year?
- 7) How many events does your organization participate in each year?
In Nanaimo: Vancouver Island (Outside of Nanaimo): Elsewhere:
- 8) How many of those events are hosted in the Greater Nanaimo Region?
- 9) How many provincial or national competitions has your organization hosted in Nanaimo in the past 5 years? Please list.
- 10) How many events does your organization host each year?
How many is your organization interested in hosting?
League (number of leagues, NOT number of games per league)
Exhibition game
Tournament (one-off)
Tournament (annual)
Tournament series (multiple tournaments in one year)
Special event
Other?
- 11) For each event that you currently do host, please provide the:
 - Name of the event
 - Facility or facilities the event is hosted at
 - Number of athletes; number of coaches; number of officials
 - % of participants who require an overnight stay to participate
- 12) What type of event would your organization be interested in hosting?
League (number of leagues, NOT number of games per league)
Exhibition game
Tournament (one-off)
Tournament (annual)

Tournament series (multiple tournaments in one year)
Special event
Other?

13) What level of event would your organization be interested in hosting?

- Local (Nanaimo-only)
- Regional
- Provincial
- National
- Continental
- International
- Other?

14) Please highlight your organization's top three (3) obstacles to organizing / hosting an event.

- Not enough interest from the community
- Not supported by the current executive
- Not enough athletes to participate
- Not enough volunteers or limited capacity of volunteers
- Not enough funding to cover event cost
- Not enough experience within our organization / in the community to host such an event
- Not enough governing body support
- Not enough capacity in the current sport venues / facilities
- Not enough capacity in local hotels / accommodations
- Not the right level / type of service in local hotels / accommodations
- Existing sport venues / facilities are not equipped for our level of competition
- Other?

Please elaborate:

15) Does your organization as a whole have any existing contracts / agreements with hotels / accommodations providers? If yes, which ones?

16) Does that partnership agreement extend to any events that you host?

17) What makes a hotel / accommodation partner for your sport more appealing than another?

18) Are there any services that hotels / accommodations could offer specifically to participants in your sport that would make an overnight stay for an event more appealing? (e.g., shuttle from ferry or airport, equipment storage, special meals for athletes, etc.)

19) How attractive is the Greater Nanaimo Region as a sport hosting community?
(0 being not at all and 5 being very attractive)

20) What are the greatest strengths / attributes of the Greater Nanaimo Region as a sport host community?

Nanaimo Sport Tourism Strategy
Deliverable Briefing for the Steering Committee
Community Sport Organization Survey



- 21) What are the greatest weaknesses of the Greater Nanaimo Region as a sport host community?
- 22) Anything additional you wish to share about sport tourism : sporting event bidding or hosting in the Greater Nanaimo Region?
-

Concluding Message to Participants: _____

Toa Consulting and the Nanaimo Hospitality Association thank you for participating in this survey.

All responses are confidential and will remain completely anonymous. Responses are presented in an aggregate / summary format only, unless express written consent is provided. If additional clarification of any of your answers is required, a team member from Toa Consulting will contact you directly.

Our goal is to present your feedback to key sport tourism stakeholders in the Greater Nanaimo Region to help steer investments, services and support to better respond to your needs and the needs of your members, as related to sporting events and sport tourism in the community.

If you have any questions about this survey, or if are interested in learning more, please contact admin@advantagetoa.com.

Appendix 3 – List of Identified Sports and Survey Participants

Identified Sports in Canada	Known Presence in Nanaimo	Number of Survey Respondents
Air Sports		
Athletics (Track & Field)	Y	1
Archery	Y	
Badminton	Y	2
Baseball / Hardball	Y	2
Basketball - Indoor (Full Court)	Y	
Basketball - 3-on-3		
Biathlon		
Billiards		
Boccia		
Bowling - 5-pin		
Bowling - 10-pin		
Bridge		
Broomball		
Boxing	Y	
Cheer		
Chess		
Climbing – Ice		
Climbing – Indoor		
Climbing – Rock	Y	
Cricket	Y	
Curling	Y	
Cycling - BMX	Y	
Cycling - Cycle-Cross	Y	1
Cycling - Mountain Biking	Y	1
Cycling - Road	Y	
Cycling - Track		

APPENDIX: Nanaimo Sport Tourism:
Sport Tourism Strategy (Originally Published May 2019)

Dance Sport		
Darts		
Disc Golf	Y	
Diving		
Equestrian	Y	
eSports		
Fencing		
Figure Skating	Y	
Football - Tackle	Y	
Football - Touch		
Goalball		
Golf	Y	
Gymnastics	Y	1
Handball		
Hockey - Ball	Y	
Hockey - Field	Y	1
Hockey - Ice	Y	5
Hockey - Road	Y	
Hockey - Roller	Y	
Hockey - Sledge		
Lacrosse - Box	Y	4
Lacrosse - Field	Y	*
Lawn Bowls	Y	1
Martial Arts - Judo	Y	
Martial Arts - Jiu-Jitsu	Y	
Martial Arts - Karate	Y	1
Martial Arts - Kenpo	Y	
Martial Arts - Kickboxing	Y	
Martial Arts - Mixed Martial Arts	Y	
Motocross	Y	
Paddling - Dragonboat	Y	1

APPENDIX: Nanaimo Sport Tourism:
Sport Tourism Strategy (Originally Published May 2019)

Paddling - Canoe / Kayak	Y	3
Pickleball	Y	1
Quidditch		
Racquetball		
Ringette	Y	
Roller Derby	Y	1
Rowing - Conventional	Y	1
Rowing - Ice		
Rowing - Ocean		
Rugby - 7s	Y	2
Rugby - 15s	Y	*
Running	Y	1
Sailing	Y	
Shooting		
Skateboarding		
Skiing - Alpine		
Skiing - Cross-Country		
Skiing - Freestyle		
Sled Sports - Bobsleigh		
Sled Sports - Luge		
Sled Sports - Skeleton		
Snowboarding		
Snowshoeing		
Soccer - Outdoor	Y	3
Soccer - Futsal		
Soccer - Indoor	Y	*
Soccer - Sand		
Softball - Fastpitch	Y	1
Softball - Slo-pitch	Y	*
Speed Skating		
Squash	Y	1

APPENDIX: Nanaimo Sport Tourism:
Sport Tourism Strategy (Originally Published May 2019)

Swimming	Y	2
Surf, Kiteboard, Wind Surf, Wakeboard		
Synchronized Swimming		
Table Tennis	Y	1
Tennis	Y	
Trampoline / Parkour	Y	*
Triathlon	Y	
Ultimate Frisbee	Y	
Volleyball - Indoor	Y	
Volleyball - Grass	Y	
Volleyball - Sand / Beach		
Waterpolo		
Weightlifting	Y	1
Wheelchair Basketball		
Wheelchair Rugby		
Wrestling	Y	1
Multi-Sport	Y	3
TOTAL	60	44
Legend		
Y = Yes, they have a presence		Affirmative response
* = Sport is accounted for through another sport (e.g., parkour = gymnastics)		Strong recommendation to seek a response, since their membership numbers in Nanaimo are high or they have a notable presence

Appendix 4 – Detailed SWOT Analysis

Strengths

- Fantastic Parks and Recreation team at the City of Nanaimo – works hard to make facilities available; open to hearing about the local sport organization “wish list” for existing facilities
- City is also open to public-private partnerships and good at structuring
- Great conference centre that is highly under-utilized
- Good relationships among key organizations in the tourism sector in Nanaimo and on Vancouver Island (including City, Region and Destination Marketing Organizations at all levels)
- Very supportive Hospitality Association (financially and otherwise) and Destination Marketing Organization
- Vancouver Island University (VIU) is a strong advocate and contributor to growth of sport tourism in the region
- Highly participatory stakeholders in the community
- Stakeholder groups will collaborate informally to get things done, even if the formal channels are blocked
- Willingness in community organizations to make small investments in grants and special projects
- Great amenities in the region
- Very affordable location to visit and to live
- Volunteers with strong experience in the community
- Really knowledgeable and revered coaches and officials in some sports in Nanaimo (e.g., Badminton)
- Strong “athlete alumni” base in the region that has not yet been tapped into
- Good investment in some sport facilities like the Stevie Smith Bike Park or Harewood Centennial
- Track record of generating good opportunities for Nanaimo piggy backing off other large events (e.g., Vancouver 2010 Olympic Winter Games)

Weaknesses

- The City is grappling with its identity overall and is missing a centralized “source of pride” – this is trickling down and creating noticeable tension within industry, economic development and the tourism product portfolio
- Lack of civic pride

- Previous lack of singular overarching governing body for tourism and economic development; unclear “reach” of the City
- No clear sport tourism strategy – lots of “things we need to do to get better”, but not “here is what to chase”
- Despite community organizations’ willingness to invest in sport tourism, the funding pool is not large enough
- Lack of existing processes and procedures for things like “requesting small capital upgrades”
- Scalability for events does not exist in Nanaimo (for facilities, accommodations or services provided)
- Business case and supporting segmentation profiles are not something that have been readily incorporated or leveraged in past tourism strategies
- Organizations have ambitious agendas and interest in supporting sport tourism, but limited “people capacity”
- Presently there is no centralized volunteer database
- Limited hotel room capacity – Parksville has more hotel rooms available than Nanaimo – also limited number of 4-Star + hotels in the region (which limits target demographic / possible sport event options)
- Volunteers are knowledgeable, but burnt out
- Funding pool not large enough to bid on any substantial event
- Public perception of Nanaimo from parties outside of Nanaimo
- Vancouver Island University (VIU) has a gymnasium and accommodations available, but the infrastructure is declining and near-term investment limited
- Nanaimo could better promote their existing facilities
- Some bylaws may inadvertently be restricting the timing, format or location of some sporting events

Opportunities

- Well-situated as a corridor to the mid-Island and very accessible across the Island and the Mainland
- Nanaimo’s natural geography and climate can be leveraged to position itself distinctly among competitors
- City good at creating strong partnerships and license / use agreements with semi-professional teams (e.g., Nanaimo Clippers)
- First Nations community interested in capital projects / initiatives that would benefit the community and spur economic growth and shared prosperity

- Ministry of Forests, Lands, Natural Resources Operations and Development (FLNRO) and other Government Ministries have been notably involved in destination development in Nanaimo
- Political decision makers are encouraging the City and organizations in tourism to take the lead, lay the ground work and make the proposals
- Two new hotels being built to increase hotel capacity and offer newer product to the Nanaimo market
- City committed to supporting the management of tourism and event services
- Tourism Vancouver Island acting as Tourism Nanaimo is good at product development
- Past legacy investment has worked (e.g., Dragonboat Festival coming out of Expo '86)
- Events that are tied to "a cause" have a higher adoption rate in the community than those that are not
- Successful sporting events in recent years in Nanaimo that can help maintain momentum in this space (e.g., Hometown Hockey)
- There is room in the Nanaimo market for more "home-grown" events

Threats

- Unclear / misaligned definition of sport tourism
- Long process for land acquisitions and designation
- Capital investments in Nanaimo specifically targeting sport, without positioning other benefits to the community, are highly unlikely to be passed
- Very vocal community, which could be good or bad, but recently have been adversaries to major capital investment projects for sport facilities
- Citizens of Nanaimo are sensitive to tax hikes – an additional \$1M in spend is a 1% tax increase
- High schools in the region are closing, removing some facilities from the mix and reducing overall capacity
- Several facilities need notable upgrades
- Potential misalignment between what sports naturally "fit" in the Nanaimo market versus where the investment and target markets are (e.g., sport that will draw competitors from Asia, yet tourism investments going into Alberta and Washington as target markets)
- Recent rejection of Multi-Plex Arena can have "residual effect" and create resistance for future proposals

- All organizations need to stay aligned on the strategy and work together collaboratively and seamlessly for the strategy adoption / implementation to be successful
- Tourism is shifting away from pure product (i.e., what is available at the destination) to product / experience development (i.e., how can we create an experience and develop new offerings within the destination) – Nanaimo is not presently strong in this space, nor does the capacity or funding exist to advance it rapidly
- Local sport organizations are familiar with hosting smaller technical events, but are not accustomed to delivering “experiences” or “tournament spectacles”