

The logo for Ski, featuring a stylized grey mountain peak and the word "SKI" in bold red capital letters.

50 YEARS

2018 Annual Report

CELEBRATING



YEARS

1967 - 2018

CWSAA.org

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2017-18 CWSAA Board of Directors



Board Chair

Steve Paccagnan
Panorama Mountain Resort

Associate Member Director

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Inter-Mtn. Testing &
Inter-Mtn. Enterprises

Helicopter-Cat Skiing Division

Patric Maloney
Snowater Heli Skiing &
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Sunshine Village

ASM Division Chair

Andre Quenneville
Mt. Norquay

ASM Directors

Shawn Balog, Snow Valley
Jason Paterson, Marmot Basin
Lawrence Blouin, Table Mountain

BC-Yukon Division Chair

Andy Cohen
Fernie Alpine Resort / RCR

BC Directors

Doug MacFarlane, Whistler Blackcomb
Peter Nixon, Sun Peaks Resort
Eddie Wood, Mt. Seymour

Subsequent to this photo, Thierry Keable stepped down from the Board and was replaced by Doug MacFarlane from Whistler Blackcomb.



Message from the Chair Steve Paccagnan

This year the Canada West Ski Areas Association celebrates its 50th anniversary.

Our association has come a long way in 50 years and now represents over 280 members. I would like to thank and acknowledge all divisions of our diverse membership: Alpine/Nordic, Helicopter/Cat Skiing, and our Associate Members. Each of these areas are equally key to making our industry a success and our association wouldn't be as successful as it is without each valued member. Thank you to everyone for the years of support and it is because of our diverse membership that our association is so strong.

Many pioneers in the ski industry have helped shape CWSAA into the vibrant organization it is today. I want to say thank you to those that have served in many capacities over all these years and for your dedication to our industry and association. At the same time, I look toward the up and coming leaders that will be the driving force behind CWSAA for the next 50 years and am excited about the direction we are heading.

Throughout the year, the Board of Directors for CWSAA work on many key initiatives to set up the ski industry for success and these initiatives will be further highlighted during the AGM. We have also focused energy on meeting with many levels of government to make certain strong relationships have been built and to ensure our role as social and economic contributors in the greater tourism industry are front and centre.

This is my last term as Chairperson for the CWSAA and I'm looking forward to assuming the role of Past Chair, which is a role that best assists members and the board. Looking forward, we have a very dedicated group of industry professionals serving as your Board of Directors, and along with Christopher Nicolson's team and leadership we are set up for success as we continue our great legacy.

Sincerely,

Steve Paccagnan
Board Chair, Canada West Ski Areas Association
President & CEO, Panorama Mountain Resort

CWSAA's Five Strategic Priorities

Safety and Risk Management

Government Advocacy

Industry Development

New Skier & Rider Development

Culture & Communication

Message from the President Christopher Nicolson

CWSAA believes it needs to increase the awareness of skiing and snowboarding in Canada. This has traditionally been to grow our market beyond the existing 14% of the population. It is also because, decision makers not familiar with our industry or its contribution, are making policy choices from tax to education to land use that impact our future.

The ski industry in Western Canada generates nearly \$900 million in direct revenues. For the first time, CWSAA in partnership with both the Alberta and BC governments, will present at conference the full employment and economic impact of our industry measured in billions. We must also convey the social advantages to communities throughout the country. The mental and physical health benefits, and the community engagement that the ski industry enables, are essential parts of our social fabric as Canadians. Over the past year, CWSAA has presented this narrative with public officials, and we must all continue to share it.

Part of this outreach involves schools. CWSAA has partnered with like-minded agencies (eg: EverActive.org) and engaged with provincial ministries to convey the benefits of snowsports in schools. This year, CWSAA and Canadian Ski Council produced a video for government and school officials to communicate the physical, mental and social benefits of snowsports to youth development. The industry continues to foster best practices to ensure the safety and confidence in snowsport participation.



CWSAA also embraces the opportunity and responsibility to welcome new Canadians to winter sports. We must motivate and service through the eyes of newcomers to a snow culture. Several ski areas have embarked on this journey and the spring conference will accelerate this direction with inspiring content.

Providing a safe and well managed environment for guests continues to be a lead priority for CWSAA. Our close working relationship with regulatory and educational bodies will continue, and so will the focus on professional development at events such as the spring conference. The environment in which CWSAA and ski operators provide their services is changing, and we must anticipate and evolve with it.

This spring, CWSAA celebrates 50 years of service and the pioneers of our industry. To honour these visionaries, the conference will challenge our norms, and plant seeds of inspiration and innovation to carry us forward. It is with this spirit we embark on the journey ahead.

Cheers,

Christopher

A handwritten signature in black ink, appearing to read 'CN', representing Christopher Nicolson.

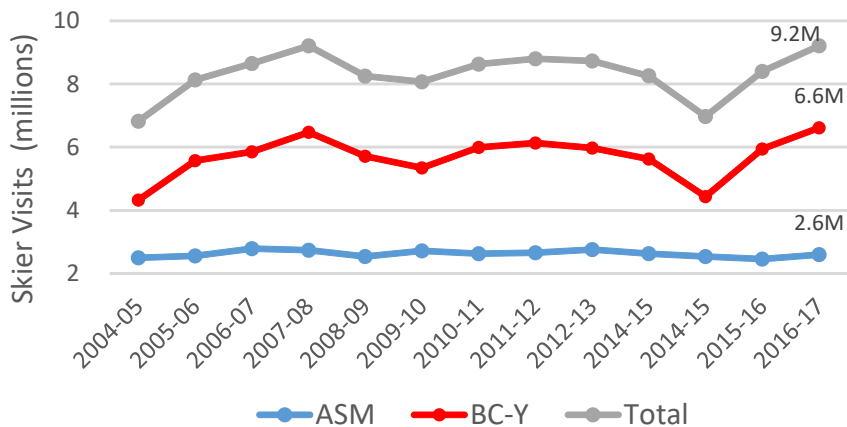
Christopher Nicolson
President and CEO
Canada West Ski Areas Association

Industry Performance

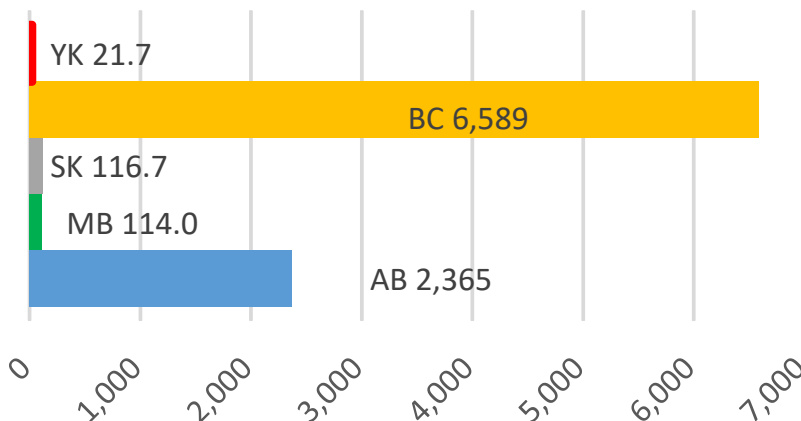
2017/18 ski area visits are not available at the time of printing. Projected results will be presented at the CWSAA Spring Conference. The graphs below illustrate historical and 2016/17 results in Western Canada.

\$890M
est 16/17 West
Lift Co revenues
(Ecosign)

HISTORICAL ALPINE SKIER VISITS



2016/17 SKIER VISITS BY PROVINCE (in thousands)

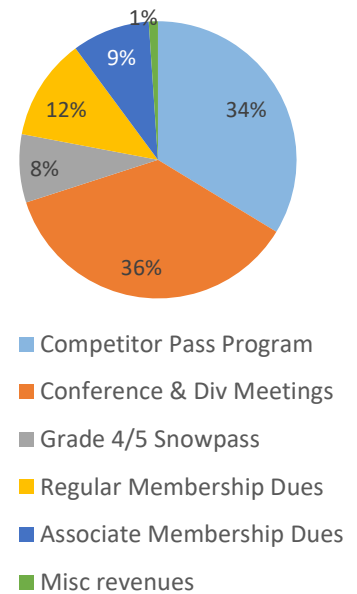


Financial Overview

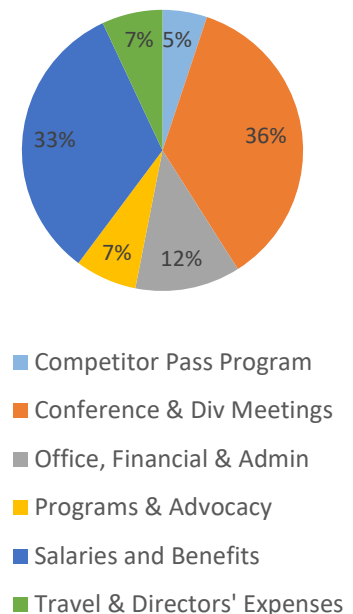
For detailed Financial Statements please see the CWSAA Members Only website or contact the office.

CWSAA is in a strong cash position. The Board Treasurer reviews and approves financials monthly and the financial statements are reviewed at board meeting and by an external accounting firm annually.

Revenues



Expenses



Advocacy

NATIONAL ADVOCACY INITIATIVES

Avalanche Explosives Storage - CWSAA and the Canadian Avalanche Association (CAA) are close to finalizing the new Explosives Regulatory Division (ERD) storage policy. This collaborative effort was a significant win, as CWSAA funded an effort to demonstrate to the government the negative impacts of proposed policy changes in the unique ski area landscape. Many thanks to Joe Obad of CAA, the ski area working group, and those that hosted the ERD visits.

Workforce - CWSAA HR Committee Chair Alison Crick attended the national Labour Market Forum hosted by Tourism HR Canada. National leaders met for two days with government officials regarding new pathways to increase employees. CWSAA, go2HR, and Banff Hotel Association succeeded in adding a strong western perspective.

Environment – There are numerous issues that have potential impact on the ski industry, some are related to the Species at Risk Act. These files vary by jurisdiction, and CWSAA is supporting collaborative industry efforts.

ALBERTA ADVOCACY INITIATIVES

Energy Costs – The Alberta Utilities Commission is currently undergoing sweeping changes and CWSAA is responding with the objective of maintaining seasonal tariffs for ski areas.

Sport & Government - CWSAA has developed new partnerships (EverActive) with youth and health-related agencies.

This is intended to amplify the ski industry within the Ministry of Education and broader government, and grow snowsport participation in youth.

Marketing Investment – CWSAA met with Minister of Culture & Tourism, Ricardo Miranda, and advocated for increased funding of winter tourism for both Travel Alberta and the Ministry.

WCB Policy Review - CWSAA participated in the review of proposed changes to WCB policy following Bill 30. CWSAA pressed for clarity on interim relief, injured workers, earning capacity and code of conduct. Policy themes were abstract at the time of review, and the detailed regulation is still being developed.

Occupational Health & Safety Review -

CWSAA provided a submission to government on proposed workplace harassment and safety committee regulation. CWSAA supported worker and guest safety, and highlighted the need for realistic implementation time frames for any new policy, and capacity to deliver training, especially in rural Alberta.

Labour – CWSAA with other business groups sent submissions to the provincial government this past year highlighting the impacts of the new minimum wage, employment standards and labour code legislation. All requested gradual implementation time periods to allow businesses to adjust. Advocacy now focuses on shaping details within the policy.

Government Ski Industry Awareness – CWSAA has made significant strides in engaging with the Alberta government through meetings with the Ministries of Health, Education, and especially Tourism. Ministry representatives attended the CWSAA board meetings in January and will be presenting at the spring conference.



Andre Quenneville
Alberta Saskatchewan
Manitoba Division Chair
General Manager
Mt. Norquay

BRITISH COLUMBIA ADVOCACY INITIATIVES

Winch Cat Tree Anchors - CWSAA and a working group of ski areas developed best practices to ensure the continued use of tree anchors for winch grooming, that have been accepted by WorkSafeBC.

Adventure Tourism Strategy - The Adventure Tourism coalition has gained some traction with the Ministry of Tourism to improve the regulatory environment for adventure tourism.

All-Seasons Resort Policy - Over the past year, a working committee from CWSAA has reviewed the All-Seasons Resort Policy with government. Updates will be presented at the spring conference. CWSAA has been actively rebuilding relationships with the new leadership at the Assistant Deputy Minister and Executive Director levels in the Mountain Resort Branch.



Andy Cohen
BC-Yukon Division Chair
General Manager
Fernie Alpine Resort / RCR

Speculation Tax - A CWSAA delegation met with FLNRORD Minister Donaldson and vigorously campaigned the Ministry of Finance to successfully gain clarity on the new tax and ensure ski area exemption.

Wildfire Mitigation - The Forest Enhancement Society is a steward of funds for rural wildfire mitigation. Through the year, CWSAA representatives met with government and the Society and achieved acceptance for ski areas to be included within the mandate for funding. CWSAA also presented this to the BC Wildfire Review Panel.

Minimum Wage - Given that a minimum wage increase seemed inevitable, gradual and predictable increases were advocated for in CWSAA's submission to the Fair Wages Commission. The provincial government has since announced a moderate path to a \$15 minimum wage in 2021. This strikes a balance between interest groups.

Accommodation Tax - CWSAA was pleased with the provincial government's commitment to collect the Municipal Regional District Tax (MRDT) from Airbnb. This is a positive first step in levelling the playing field in accommodation taxation.

CWSAA continues to support the removal of the four-room-or-less taxation exemption.

Lift Safety Education - New updates to the Lift 151, 152 & 153 courses are under development and will launch in 2019. Technical Safety BC and CWSAA are working with Selkirk College to advance lift safety education and create a course module with flexible delivery during the year.

Family Day - The provincial government will move BC Family Day to the third Monday of February beginning in 2019. CWSAA and the tourism industry had vehemently communicated and petitioned the new government to leave the date on the second Monday, however, the decision was consistent with the NDP election platform. To help maintain the current ski volumes on the second weekend, industry discussions will occur at the spring conference.



CWSAA Directors and Mountain Resorts Branch met with government regarding the speculation tax, March 2018 in Victoria.

Safety & Risk

Lift Terminal Signage - New lift terminal safety signage originating in Ontario creates a new simplified look for safe lift usage. The CWSAA Board and Safety & Risk Committee has given input and is supportive of the direction for implementation in 2018-19.

Industry Safety Messaging

Safety on the slopes for all users is the top priority for ski areas and CWSAA. At the Fall Canada West meetings, the NSAA #RideAnotherDay initiative was presented to ski areas. CWSAA has endorsed these NSAA tools that reinforce safety messages, and many Canadian ski areas have integrated them into their Risk & Safety messaging.

OSRA and the CSC funded a new suite of safety videos that will be available in 2018-19. CWSAA recommends these tools be integrated into ski area websites and messaging tool kits to increase safety awareness of guests and staff.

School Liability – A BC pilot project to address liability concerns for school ski trips continues to evolve. There has been strong and positive dialogue between the school protection branch and CWSAA. Misconceptions of risk and school visit procedures have been dispelled, which has alleviated immediate concerns at the provincial level. CWSAA continues to pursue best industry practices.



Tubing Manual – A CWSAA tube park operations working group has reviewed and updated the tube park best practices manual.

Snow Immersion Suffocation – CWSAA has approved new signage to increase the awareness of skiing and riding around tree wells.

Exclusion of Liability Signage Updates – Updates to the exclusion of liability signage were made this winter. The sign is now directed at all persons coming on to the premises whether a pass holder, ticket holder, pedestrian or trespasser. It is recommended that ski areas phase in the new signage over the next year focusing on the base of the ski area (pedestrian areas).

Safety & Risk Committee - Thank you to the committee for all their contributions this year. **Ryan Stimming's** term as Chair of the Committee has come to an end. CWSAA would like to extend a special thanks for the dedication and support Ryan has provided to the industry.





New Skier & Rider Development

National Initiatives – New skier and rider growth is a priority for our industry. CWSAA is actively engaged with the Canadian Ski Council (CSC) to support this goal through multiple initiatives. The Grade 4/5 Snowpass and Never Ever Days programs are core national products for introducing snowsports to new participants and youth.

New Canadians – Diversifying participant demographics is a CWSAA focus for new skier initiatives. National research is being undertaken to further understand barriers to participation by new Canadians. The 2018 Spring Conference contains multiple sessions on new Canadians in snowsports to advance industry learning.

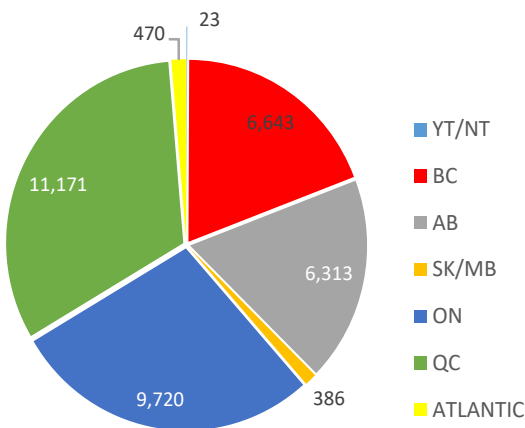
Go Ski Alberta – All ski areas in Alberta participated in this year’s program which aims to grow participation in snowsports. New ‘First-Time’ videos and photo assets were developed this season to showcase ethnic diversity and accessibility.

School Initiatives

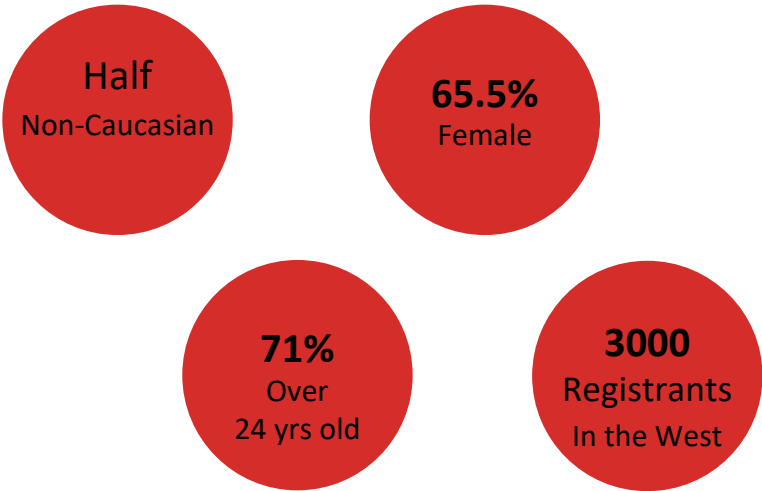
The CSC and CWSAA created a video for school officials that articulates and defines the benefits of snowsports. Through teacher interviews, the video highlights how snowsports advances the physical and mental development of youth in a controlled environment. The video is now actively being presented to levels of government, and ski areas are encouraged to share it with schools as part of their toolkit to grow school visits.

Ever Active Schools Alberta has developed a new program for schools - Ski, Skate and Slide. CWSAA encourages Alberta ski areas to introduce the initiative to local schools.

GRADE 4/5 SNOWPASS
2017/18 DISTRIBUTION OF PASSES



NEVER EVER DAYS
2017/18 PARTICIPATION





October 2017, Banff Alberta

Alberta Ski Industry delegates meet with Tourism Minister Miranda

Industry Development

The pinnacle of the CWSAA industry development program is the spring conference. Educational workshops, sessions and presentations are identified and in many cases executed by CWSAA members. Throughout the year, industry development is advanced through partners like Technical Safety BC, AEDARSA, and Selkirk College. Fall division meetings and Saskatchewan's mid-winter meeting are events that raise the level and performance of the area operators.

CWSAA wishes to thank the many individuals that contribute their time to serve on CWSAA committees. These range from conference planning and technical advisory boards, to Risk Management and Snowsports.



CWSAA Team:

Cynthia Thomas, Dawn Sleiman, Christopher Nicolson, Bruno Graziotto (missing)

The **Small Areas Assistance Fund** is a specific initiative to enable small areas to take advantage of these services. Thanks to industry support and funds raised during the Spring Conference auction, 13 ski areas were funded to attend the 2018 spring conference.

A significant endeavour each year is the CWSAA ski area **financial analysis conducted by Ecosign Mountain Planners**. For over 30 years, Ecosign has facilitated a benchmark data set for ski areas to measure performance and improve. All members are encouraged to contribute to this financial analysis which provides valuable insights into industry trends and financial benchmarks. Building upon this research, CWSAA is producing a full economic impact of the ski area investment that gives us a full economic footprint of our industry.

SROAM



This spring CWSAA welcomes to our industry 18 graduates from the **Selkirk College** Ski Resort Operations and Management program. Pictured left!

19 students are finishing up their first year, and planning their work placements for next season.

Culture & Communication

The 2018 50th Spring Conference is a watershed event for CWSAA. Pioneers that have created the industry will be celebrated, and as importantly, their vision and successes will be shared with the new generation of ski industry professionals attending the conference.

Serving the needs of members is the lead priority of the association, and direct communication between CWSAA and ski areas is vital. Identifying these priorities comes from direct communication by phone, email and ski area visits...83 over the last two years. CWSAA invests time to solicit and distribute information through industry events, newsletters, website, active social media channels and continual updating of our member database.

The Association also brings the interests of its members forward through active participation in other associations, coalitions and events. These formal and informal alliances help amplify the voice of our industry onto provincial and national platforms and be a part of decisions that impact our industry. A complete list will exhaust this page but includes Chambers, ski industry associations, destination marketing organizations (DMOs) and government ministries.



Canadian Ski Council Board Meeting:

Christopher Nicolson (CWSAA), Yves Juneau (ASSQ), Claude Peloquin (Ski Bromont), Neil Champagne (Mont Tremblant)

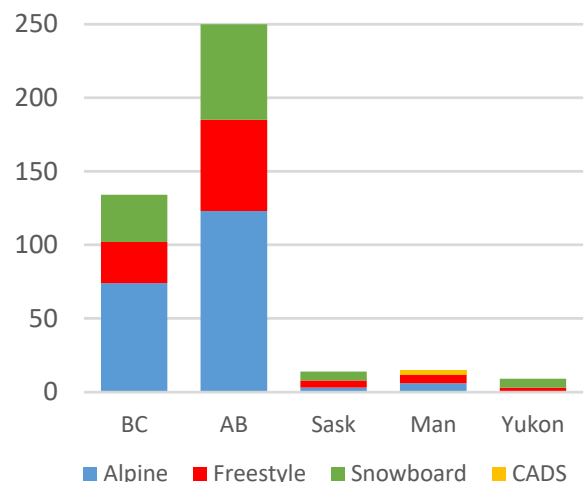
Competitor Pass

This pass enables promising young ski and snowboard athletes and coaches access to Western Canada's ski and snowboard resorts for the purpose of training and competition. Many athletes compete with the dream of one day representing Canada in Olympic and Paralympic Games. This year's Olympics showcased many former passholders in Snowboard, Alpine, Freestyle and Paralympic events.

In 2017/18, 350 athletes and 72 coaches participated in the program, for a total of 422 passes.

*Special thanks to **Stewart Laver** of Sunshine Village for coordinating this program.*

2017/18 DISTRIBUTION OF PASSES



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CWSAA Winter Board Meeting: Snow Valley, Alberta. January 2018.

Canada West Ski Areas Association

778.484.5535

www.cwsaa.org