

The Games effect.*

Report 2: Impact of the 2010 Olympic and Paralympic Winter Games on British Columbia and Canada: 2003 – 2007

March 2009



Key Impacts

The 2010 Winter Games are anticipated to impact many areas. The following is a selection of notable impacts that have occurred between 2003 and 2007. PwC is currently looking at the 2008 year, and will report those observations in a subsequent report. Our early comments on 2008 are contained later in this report in the section “Looking Forward”.

By 2007, Canada improved to second from fourth in winter sports based on the International World Olympic Sport Index.

In 2005, Own the Podium 2010 was created as a national sport initiative to help Canada become a leading nation at the 2010 Winter Games. Funding for elite athlete development of \$110 million has been attained through a combination of government contribution and private sector partner funding.

\$451 million was spent on 2010 Winter Games venue construction and \$220 million on community sports facilities.

The 2010 Winter Games are estimated to have generated between \$43 million and \$54 million in provincial tax revenues and between \$38 million and \$48 million in federal tax revenues from 2003 to 2007.

2010 Winter Games preparation generated approximately \$470 million in real GDP to BC from 2003 to 2007 and an additional \$77 million in real GDP to Canada.

\$46 million in venue construction contracts was awarded to self-identified Aboriginal businesses.

\$20 million was provided to 123 communities to improve facilities and equipment as part of the BC government’s Olympic/Paralympic live sites program.

The Canadian Tourism Commission received \$26 million to leverage tourism impacts of the 2010 Winter Games. The Canadian Tourism Commission, Tourism BC, Tourism Vancouver, and other tourism organizations developed plans to leverage the impacts of the 2010 Winter Games.

The 2010 Winter Games are estimated to have produced up to 10,500 jobs in BC, approximately 5,000 of which were generated as a result of venue construction activity. A further 890 jobs were created across Canada through inter-provincial trade.

129,000 coaches were trained through the National Coaching Certification Program.

35,000 spectators experienced VANOC’s presentation at the Turin closing ceremony in 2006, coupled with an estimated television audience of 550 million.

Over 41,000 people attended the annual Whistler celebration arts festival between 2003 and 2007.

BC-Canada Place at the Turin Games attracted more than 125 journalists from 20 countries and allowed more than 80 BC businesses to connect with international audiences.

Four First Nations organizations established the Four Host First Nations Society (FHFN) to work with VANOC and other partners to maximize opportunities for participation in the 2010 Winter Games by First Nations, Métis, and Inuit peoples.

VANOC established a Buy Smart Sustainable program that has as two of its seven objectives: growth of Aboriginal and minority owned businesses and the sustainable enterprise sector; and increased jobs for socially and economically disadvantaged groups.

A number of new innovations in building design and construction were introduced, including:

- On-site composting for green site material at the Whistler Olympic Park
- Consumption monitoring, solar recovery, and waste-heat harvesting technology at the Vancouver Olympic and Paralympic Village
- An innovative one-of-kind “wood wave” roof design using wood affected by the Mountain Pine Beetle infestation in British Columbia at the Richmond Oval.

Nine newly constructed Games venues were built to some of the highest standards in environmental and energy efficient design.

Winning the 2010 Winter Games bid led to the creation of 2010 Legacies Now, an organization that has taken the lead role in the development of sustainable legacies in sport and recreation, physical activity, arts, literacy, accessibility and volunteerism in the province of British Columbia.

178 business opportunities workshops were held by the 2010 Commerce Centre across BC with attendance of close to 5,000 people.

Small business creation was promoted—close to 900 businesses formed in the past five years have registered with the 2010 Commerce Centre for 2010 Winter Games procurement opportunities.

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Background

Introduction

The Government of British Columbia and the Government of Canada have made major commitments to the success of the 2010 Olympic and Paralympic Winter Games (the 2010 Winter Games). These commitments have encompassed funding for games-related infrastructure and operations, together with a wide range of policy and funding initiatives aimed at using the 2010 Winter Games as a catalyst for implementing, enhancing and/or accelerating programs for individuals, organizations, and communities.

As a result, the Government of British Columbia through the BC Olympic and Paralympic Winter Games Secretariat (the BC Secretariat) and the Government of Canada through the 2010 Olympic and Paralympic Winter Games Federal Secretariat (the Federal Secretariat) have identified the need to assess the economic and social impacts of the 2010 Winter Games before, during and after hosting the Games.

PricewaterhouseCoopers LLP (PwC) has been engaged to conduct this series of impact assessments using a combination of research and benchmarking methods. The entire project will run from 2008 through 2013. The first three reports in this series are:

- A report that discusses the overall project methodology (Framework Report)
- A summary of impacts of the 2010 Winter Games from 2003 to 2007 (this report)
- A detailed report of the impact of the 2010 Winter Games from 2003 to 2008

Because the main purpose of this report is to introduce the project approach and reporting structure, it contains a summary of impacts rather than a complete in-depth analysis. A complete and in-depth analysis of the impact for the period from 2003 to 2008 will be contained in the next planned report in the series (to be released summer of 2009).

This report considers over 75 separate measures that strive to provide a sense of the overall breadth of the 2010 Winter Games. We believe that these measures provide an appropriate overview of each topic area considered within this report. We also recognize that there may be additional measures beyond those considered. However, it was not practical to add further measures, either because the activities were difficult to measure objectively or because the measures would duplicate impacts already captured by other measures in the report.

Project Goals

The overall objective of the project is to identify the impacts of the 2010 Winter Games on BC and Canada. The specific project goals are:

- Track various economic and social measures
- Analyze the collected data using a combination of analytical methods
- Develop a comprehensive assessment of the direct and indirect impacts of hosting the 2010 Winter Games, and of the steps taken by the federal and provincial governments to leverage these impacts
- Relate the following eight topic areas to the various economic and social measures to be tracked, analyzed and reported:
 1. Sport development
 2. Tourism
 3. Environmental sustainability
 4. Social development
 5. Arts and culture
 6. Economic development
 7. Employment
 8. Business development
- Prepare a series of reports between 2008 and 2013

Project Scope

In Scope

The project will:

- Develop a methodology to assess the impacts of hosting the 2010 Winter Games
- Identify and monitor impacts of the 2010 Winter Games over a five-year period covering before, during and after the Games
- Attribute impacts to:
 - Delivery of 2010 Winter Games with no incremental activity undertaken by the federal and provincial governments
 - Delivery of 2010 Winter Games with full incremental participation by the federal and provincial governments
- Compare impacts to:
 - If Canada had not hosted the 2010 Winter Games
 - Experiences of other Olympic and Paralympic Games host cities (where possible)

Out of Scope

The project does not:

- Conduct program evaluations of activities undertaken by the Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter Games (VANOC)
- Conduct program evaluations of other games-related projects
- Analyze the cost-benefit of activities undertaken by VANOC
- Analyze the cost-benefit of other games-related projects
- Analyze the impact of government expenditure that is not directly related to the 2010 Winter Games, such as the Sea-to-Sky Highway, the Vancouver Convention and Exhibition Centre expansion and the Canada Line rapid transit project

Reporting Period

This report provides an analysis of key activities undertaken and observations related to each of the eight topic areas since the award of the 2010 Winter Games to Vancouver for the period 2003 through the end of 2007. Future reports will examine the impacts of the 2010 Winter Games through the end of 2012.

A separate PwC report entitled “Framework Report” is also available. That report sets out additional details on our approach and analysis methodology. It provides information related to project background, Olympic and Paralympic Games impact studies, our project process and details for each topic area, the expected timing, data collection, methods, and related impact measures.

Limitations

This report was prepared by PricewaterhouseCoopers LLP (“PwC”) at the request of the BC Secretariat and the Federal Secretariat. This report has been posted online with the understanding that PwC is not thereby engaged in rendering accounting, legal or other professional service or advice to the reader. The comments included in this report do not constitute professional advice, nor should they be relied upon to replace professional advice. This report is not to be published in whole or in part, without PwC’s prior written consent. Any use that a third party makes of this report or reliance thereon, or any decision made based on it, is the responsibility of such third party. PwC accepts no responsibility for damages, if any, suffered by any third party as a result of decisions made or actions taken, based on this report.

The material in this report reflects PwC’s best judgement in light of the information available at the time of its preparation. PwC has relied upon the completeness, accuracy and fair presentation of all the information, data, advice, opinion or representations obtained from public sources and from the BC Secretariat and the Federal Secretariat. (collectively, the “Information”). The findings in the report are conditional upon such completeness, accuracy and fair presentation of the Information. PwC has not verified independently the completeness, accuracy and fair presentation of the Information.

PwC reserves the right, at its discretion, to withdraw or make revisions to the report should PwC be made aware of facts existing at the date of the report which were not known to PwC when it prepared the report. The findings are given as of the date hereof and PwC is under no obligation to advise any person of any change or matter brought to its attention after such date, which might affect the report’s findings and conclusions.

Methodology

Eight Topic Areas

The impacts of the 2010 Winter Games on BC and Canada are expected to be broad and far reaching. Included in the scope of this project are eight topic areas:

1. Sport development
2. Tourism
3. Environmental sustainability
4. Social development
5. Arts and culture
6. Economic development
7. Employment
8. Business development

The eight areas under review are interrelated as illustrated schematically in the figure below. For example, employment is a key part of economic development and business development. Employment is expected to have a positive impact on social development and new jobs are expected to be created in the tourism, sport and arts industries. Similarly, sport facilities are key to sport development and encourage sport-related tourism. Furthermore, venues are being built that promote environmental sustainability, and many facilities will be used in ways that promote arts and culture and social development.

Additional Reporting Areas

In addition to the eight topic areas, PwC will report the impacts on selected groups in supplements to the main reports. These groups may include Aboriginal communities, persons with a disability, and Francophone communities.



Impacts

Types of Impacts

In general, the impacts of the 2010 Winter Games are the effects on individuals and society that arise as a result of hosting the Games, as well as the programs, policies and initiatives that have been developed, implemented or accelerated as a result of hosting the 2010 Winter Games.

The project is intended to encompass three main types of impacts: economic, instrumental and intrinsic. These are described below.

Economic impacts

Economic impacts are generally viewed as being restricted to quantitative, well-established measures of economic activity. The most commonly used of these measures are output, GDP, government tax revenues and employment.

- Output – the total gross value of all business revenue. This is the broadest measure of economic activity
- GDP – the “value added” to the economy (the unduplicated total value of goods and services). This essentially reflects the sum of wage income and corporate profit generated
- Government Tax Revenues – the total amount of tax revenues generated for different levels of government
- Employment – the number of additional jobs created

Economic impacts may be estimated at the direct, indirect and induced levels. Direct impacts are changes that occur in “front-end” businesses that would initially receive expenditures and operating revenue as a direct consequence of the operations and activities of a facility or project. Indirect impacts arise from changes in activity for suppliers of the “front-end” businesses. Induced impacts arise from shifts in spending on goods and services as a consequence of changes to the payroll of the directly and indirectly affected businesses.

To estimate the economic impacts of the 2010 Winter Games, PwC has developed an input-output analysis using economic multipliers published by BC Stats and Statistics Canada. A widely used and widely accepted approach, input-output modeling is recognizable to many different constituencies and audiences. The structure of the approach also facilitates comparisons between reported results for different projects and facilities.

Instrumental impacts

In contrast to economic impacts, instrumental impacts may be broad in scope and may include both activity-based and outcome-based measures. Instrumental impacts may also describe long-term or downstream activity that would not normally be captured in economic impacts. While economic impacts utilize standard measures that can be estimated for nearly any type of project, instrumental impacts and their accompanying measures may vary greatly from project to project.

Instrumental impacts may include:

- Creation of business partnerships
- Public participation in sport and recreation
- Increased numbers of tourists
- Opportunities for athletes
- Opportunities for artists and performers
- Opportunities for trainees or interns
- Leverage of additional funds
- Attraction/retention of qualified workforces

Over time, instrumental impacts may accrue to society in the form of:

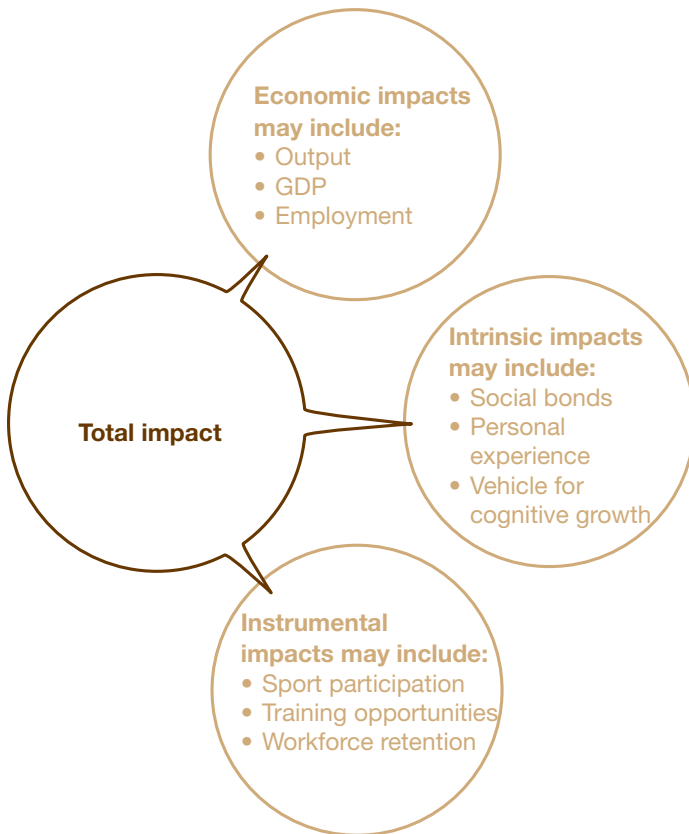
- A better-educated workforce
- A healthier society
- Stronger and more inclusive and cohesive communities

Intrinsic impacts

Intrinsic impacts are qualitative in nature and are typically associated with direct experiential impacts that individuals or society receive from activities. Intrinsic impacts may:

- Captivate people, moving them beyond their everyday experience
- Provide a vehicle for cognitive growth
- Create social bonds through sharing of experiences
- Express communal meanings that speak on behalf of communities

The relationship between economic impacts, intrinsic impacts and instrumental impacts is illustrated in the diagram below.



Impact Reporting

Classification of impacts for reporting purposes

For each topic area, we have classified and aggregated impacts into the following three categories:

- Games Delivery Impacts – impacts arising from activities that are necessary for the hosting of the 2010 Winter Games, activities that were necessary for winning the bid for the 2010 Winter Games, and activities that were a natural result of hosting the 2010 Winter Games (i.e., activities that could reasonably be foreseen to have resulted from hosting the 2010 Winter Games)
- Non-Federal and Provincial Government Leveraging Impacts – impacts arising from programs that have been implemented, enhanced or accelerated as a result of hosting the 2010 Winter Games by the private sector, other levels of government, non-government organizations, professional organizations, and community groups
- Federal and Provincial Government Leveraging Impacts – impacts arising from federal and provincial government activities, investments and programs that have been implemented, enhanced or accelerated to assist the federal and provincial governments to receive the maximum benefit from the opportunities provided by hosting the 2010 Winter Games. These include activities, investments and programs that have been designed to leverage the impacts of the 2010 Winter Games. They do not include federal and provincial government activities, investments and programs that would have occurred regardless of hosting the 2010 Winter Games

Taken together, the first two categories of impacts (Games Delivery Impacts and Non-Federal and Provincial Government Leveraging Impacts) are defined to be the impacts that would have occurred with no incremental activity undertaken by the federal and provincial governments. For simplicity, we refer to these two categories later in the tables of this report as “Games Hosting Activity Impacts”.

Taken together, all three categories of impacts (Games Delivery Impacts, Non-Federal and Provincial Government Leveraging Impacts, and Federal and Provincial Government Leveraging Impacts) are defined as being the impacts that would have occurred with full incremental activity undertaken by the federal and provincial governments.

Overview 2003 – 2007

Summary of Findings

Sport Development

Government funding of both elite athletes and sport participation increased considerably during the 2003 to 2007 period. We noted significant increases in new sport participation, coaches trained, spectator attendance, and the number of international sporting events held in Canada. As noted in the economic section, a major legacy of the 2010 Winter Games is the sports infrastructure it will leave behind.

We noted measurable impacts in approximately 65% of the measures established for sport development, placing it in the higher levels of activity among the eight areas. Within sport development, we noted:

- Canada improved from fourth ranked internationally in winter sport to second in 2007 based on the International World Olympic Sport Index.
- There was a 33.3% increase in the number of international events supported by Sport Canada from 2003 to 2007.
- The BC Sport Participation program attracted 100,000 new sport participants in 100 communities across the province.
- \$451 million was spent on 2010 Winter Games venue construction.

Looking forward, we believe that greater activity will occur between 2008 and 2010.

Tourism

The 2010 Winter Games do not appear to have had a significant impact on the volume of visitors into BC and Canada between 2003 and 2007. This situation may be due in part to restrictions imposed by the International Olympic Committee (IOC) on marketing efforts prior to the 2008 Beijing Summer Games.

While the tourism industry has experienced robust growth since 2003, we are unable to attribute growth during 2003 to 2007 to the 2010 Winter Games. It was envisioned that the tourism community would respond with a focused, coordinated marketing plan that would commence soon after the award of the Games. While tourism marketing organizations did demonstrate a strong desire to work collaboratively, the anticipated strong marketing drive did not occur during 2003 to 2007.

We noted measurable impacts in approximately 25% of the measures, making tourism among the lower areas of activity. The highlights within tourism include 2,700 hotel rooms under or proposed for construction in Metro Vancouver. We also note that the Canadian Tourism Commission has been provided with \$26 million to develop and implement a 2010 tourism strategy.

Looking forward, the focus of the industry is on capitalizing on the media exposure generated by the 2010 Winter Games to produce sustained increases in tourism to last beyond 2010.

Environmental Sustainability

We noted that even in the absence of the 2010 Winter Games, climate change and environmental sustainability would have been an issue for both the federal and provincial governments. However, hosting the 2010 Winter Games has provided a definitive target date for the governments to implement some of their environmental and infrastructure projects. For instance, the Government of British Columbia has committed to have carbon neutral operations by 2010 and the SkyTrain Canada Line, although not directly games-related, will contribute to more sustainable transportation in Vancouver during and after the 2010 Winter Games.

We noted measurable impacts in over 60% of the measures relating to environmental sustainability, meaning it had one of the higher levels of activity among the eight areas. This finding is likely the result of an initial and ongoing interest in environmental sustainability and the nature of the measures. Within this area, we noted:

- Eight of nine newly constructed venues and/or villages have applied for independent certification under the LEED green building rating system.
- Media hits relating to the 2010 Winter Games and the environment have been rising, with 56 environment-related stories noted in 2007 compared to four in 2005.
- Almost 5,000 people attended 178 business opportunity workshops which included sections on environmental responsibility and ways to leverage sustainability in games-related bidding.

Looking forward, we can expect to see more media attention around the 2010 Winter Games, ongoing sustainability training, actions by sponsors, continued reporting from VANOC, and showcasing of environmental innovation.

Social Development

Some momentum has happened around social development during the 2003 to 2007 period, with the majority in the areas of housing and job training. We noted additions to affordable housing in several areas; however, it was difficult to determine the level of new housing attributable to the 2010 Winter Games. Procurement also saw some activity through the setting up of programs.

We noted few measurable impacts related to social development with measurable impacts in 35% of the assessed measures, meaning it had among the lower level of activity of the eight areas. Within social development, we noted:

- Training programs have led to over 100 individuals, who were previously not actively seeking employment, joining the labour force.
- Procurement of over \$2 million from organizations whose operations support inner-city improvement goals.
- Funding of \$1.2 million to promote accessibility.

Looking forward, we expect increases in social housing units post-games.

Arts and Culture

Overall for arts and culture activities, substantial impacts did not occur from 2003 to 2007. Since 2003, a number of programs and events have been planned or are currently being planned. Artist and arts organizations from across Canada have opportunities to participate in the 2010 Winter Games cultural programming. Similarly, Aboriginal artists and arts organizations have the chance to express their culture through performances and the commissioning of new and unique artistic works.

We noted measurable impacts in approximately 50% of the measures, placing arts and culture slightly above the average for the eight areas. Within arts and culture, we noted:

- \$20 million has been provided for 123 communities to improve facilities and equipment as part of the BC government's Olympic/Paralympic live sites program.
- \$20 million has been committed by the Government of Canada as its share in the development of the live sites in Vancouver and Whistler.
- The Aboriginal Licensing and Marketing Program was created.
- Grants were received from the Arts Partners in Creative Development program to create new artistic works.
- Since 2003, the Whistler Arts Council has produced the annual Celebration 2010™, a month-long festival held in February that celebrates the Sea-to-Sky Corridor's arts and culture.

Looking forward, we expect the delivery of the primary arts and culture programming begun in 2008 with the presentation of the Cultural Olympiad in Metro Vancouver and the continuing annual Celebration 2010™ festival held in Whistler. Communities will continue their preparations for 2010 and their participation as a venue city, live site, or torch relay location.

Economic Development

From 2003 to 2007, the 2010 Winter Games have generated economic impacts via two main channels: the construction of Games venues and the operating expenditures of VANOC. During the period from 2003 to 2007, approximately \$451 million was spent on venue construction. This was funded equally by the provincial and federal governments. Additional venue construction of \$220 million is estimated to have been funded with contributions from the City of Richmond, the City of Vancouver, the Resort Municipality of Whistler, and the University of British Columbia. From 2003 to 2007, VANOC's operating expenditures totalled approximately \$25 million.

We noted measurable impacts related to economic development in approximately 50% of the measures, also placing it in the upper half of activity among the eight areas. Within economic development, we noted:

- The 2010 Winter Games are estimated to have produced between 8,300 and 10,500 jobs.
- The 2010 Winter Games are estimated to have generated between \$42.6 million and \$54.3 million in provincial tax revenues and between \$37.9 million and \$48.1 million in federal tax revenues.
- The 2010 Winter Games generated as much as \$470 million in real GDP in BC and \$77 million in the rest of Canada.
- Residential investment and housing prices were indirectly impacted by the Games via an induced increase in migration and employment. We have estimated that housing starts in BC over 2003 to 2007 were 0.4% higher due to games-induced impacts.

Looking ahead, it is anticipated that venue construction will likely be completed during 2009 and operating expenditures by VANOC and others will begin in earnest. Crises in global financial markets and expectations of a potentially severe global recession in 2009 may slow economic growth in Canada. However, VANOC's expenditures scheduled for between 2008 and 2010 may act as a stabilizer to the BC economy over that time, softening the impact of a slowing global economy.

Employment

The BC economy enjoyed strong employment growth (i.e., job creation) from 2003 to 2007, gaining jobs in most sectors but especially in construction. The 2010 Winter Games generated jobs directly through venue construction and operating expenditures related to Games preparation and indirectly through multiplier effects. Our estimates show that although the unemployment rate in BC would have fallen from 2003 to 2007 without the 2010 Winter Games, the increased employment growth due to the Games did have a material impact on the unemployment rate.

We noted measurable impacts during the 2003 to 2007 period in approximately 70% of the measures, placing employment among the higher levels of activity of the eight areas.

Within employment, we noted:

- Employment growth from the 2010 Winter Games has led to an unemployment rate that was between 0.2% and 0.3% lower than it would have been without the Games.
- Much of the employment generated in the 2003 to 2007 period was in construction and related industries. Of the 78,800 direct construction jobs created in BC from 2003 to 2007, we would attribute roughly 2,700 to the 2010 Winter Games (Note: we estimate the total number of jobs, both direct and indirect, created by construction activity to have been 5,140).

Looking forward, the venue construction phase of 2010 Winter Games preparation will draw to a close in 2009, eliminating a key source of job creation due to the Games. However, employment at VANOC will increase until 2010 when the organization will achieve its full complement of employees. Moreover, spending by VANOC will increase dramatically from 2008 to 2010 at a time when the economy is expected to be operating at less than its full potential. Therefore, games-related expenditures by VANOC, sponsors, and other partners may provide a much needed stimulus for the BC economy and the BC labour market.

Business Development

For small and medium sized businesses, it is difficult to determine the level of new business creation attributable to the 2010 Winter Games in the period 2003 to 2007. However, it is clear that business creation has flourished in that period and has been sustained at a level unique to this particular business cycle. Efforts to quantify the impact of the 2010 Winter Games suggest a figure as high as 5% of new incorporations, or close to 2,000 newly incorporated businesses, in each of 2006 and 2007 may be attributed to the 2010 Winter Games.

Businesses participated in 178 business opportunity workshops hosted by the 2010 Commerce Centre from 2005 to 2007. The immediate impact of these workshops is an increase in the sophistication and readiness of businesses in British Columbia. Regarding trends in head offices in BC and trade foreign direct investment, no measurable impacts were noted in the period from 2003 to 2007.

From 2003 through 2007, we noted measurable impacts for approximately 35% of the measures identified in this section. Within business development, we noted:

- An estimated 5% of new business creation in BC can be attributable to the increase in economic growth due to the 2010 Winter Games.
- 887 businesses that have been operating for less than five years noted procurement opportunities with the 2010 Commerce Centre.

The years 2008 and 2009 are expected to offer ongoing opportunities for BC and Canadian businesses as VANOC ramps up its procurement efforts. Furthermore, hosting the 2010 Winter Games will provide a world stage upon which to showcase Canadian businesses and the opportunity to build long-term trade and investment relationships with foreign firms.

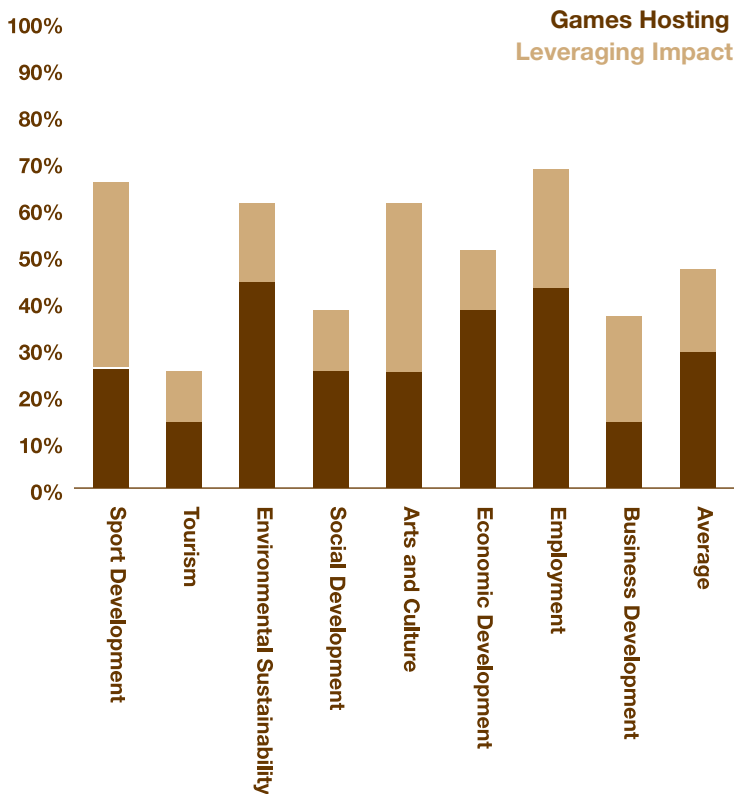
Overall Trends

During the period from 2003 through 2007, much of the focus was on infrastructure and planning. These activities, among other functions, contributed to positive findings related to sport development, employment and, to a lesser extent, environmental sustainability. As illustrated in the exhibit below, many of the measures assessed in this report had not yet started to show impacts from the 2010 Winter Games. On average, impact on only one-half of the measures could be identified in this initial report.

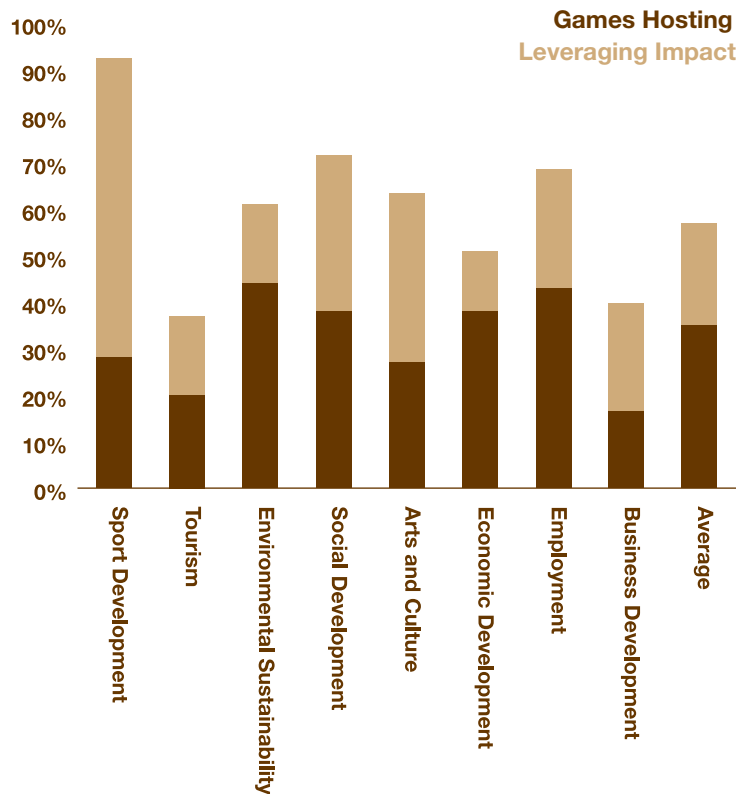
We note that impacts were not expected during the 2003 to 2007 period for approximately 20 of the measures. Removing those measures where impacts were not expected within the time frame of this report increases the average level of activity from approximately 50% to just over 60%, as depicted below.

Looking forward, we expect to see more activity beginning in 2008 and continuing on through the 2010 Winter Games period and beyond.

Percent of Measures with Activity in 2003 to 2007



Percent of Measures with Activity in 2003 to 2007 with Measures Removed for which No Activity was Expected



Sport Development

What was envisioned in the bid phase?

Commitments and proposals were submitted to develop sport for pre-games, Games and post-games periods. It was envisioned that the 2010 Winter Games would:

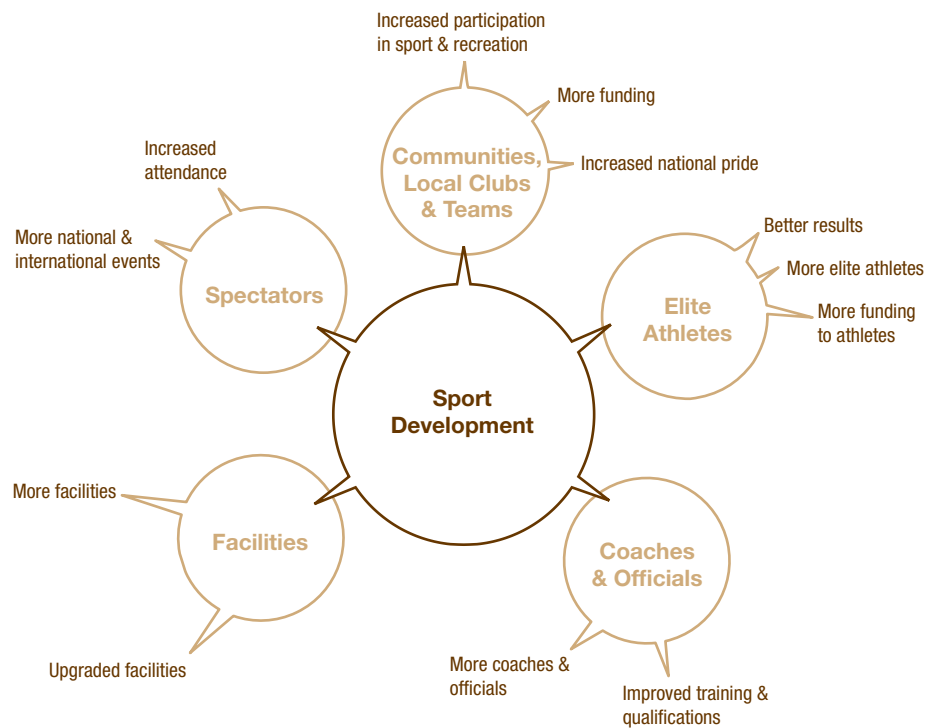
- Provide public and private investment in new and upgraded facilities for 2010 Winter Games venues
- Sustain the long-term operation of 2010 Winter Games venues
- Fund physical fitness and amateur sport
- Fund and develop elite athletes
- Provide venues for training by national and development teams pre-games and post-games
- Increase capacity for hosting international sporting events pre-games (including test events) and post-games
- Provide venues to be available for mixed use (amateur and elite, summer and winter)
- Increase seating capacity at existing facilities
- Provide various programs to motivate and inspire young people

Introduction

Sport development is core to the 2010 Winter Games. The event itself is about bringing the world's best winter athletes together in the spirit of competition and peace, and the priority of the host city is to provide world class venues and equipment for all competitions.

Impact Map

The diagram below shows the sport constituencies and anticipated impacts of the 2010 Winter Games.



Summary of Sport Development Impacts 2003–2007

The expected sport constituencies, the anticipated impacts, and the expected timing of the impacts are outlined below.

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Communities, Local Clubs and Teams	Expected to begin in approximately 2005. These impacts are expected to grow through 2010, as upgrades to community facilities are completed and excitement around the 2010 Winter Games builds.	Increased participation in sport and recreation	Participation in organized sport declined 9.5% in BC from 1998 to 2005. However, in that same time frame 8% more British Columbians became physically active.	BC Sport Participation Program (BCSP) attracted 100,000 sport participants in 100 communities across the province.
		More funding for communities, local clubs and teams	2010 Legacies Now contributed \$1 million towards new sports participation as part of the initial bid book commitment. 39.7% increase in funds raised through the National Sport Trust Fund for local clubs and teams in BC from 2005 to 2007	Sport Canada contributed \$1 million towards new sport participation. The BC Ministry of Healthy Living and Sport contributed \$212,500 from 2005 to 2007 to Promotion Plus (an advocacy group for women in sport). The Aboriginal Sport Excellence fund, created in 2004, is funded bilaterally by the BC Ministry of Healthy Living and Sport and Sport Canada. A total of \$800,000 was contributed to this fund in the 2004 to 2007 period. BC Sports Hall of Fame and Museum began receiving an operating grant in 2005/06 from the BC government. Total funding up until 2007/08 was \$337,500. \$20 million for 123 communities has been provided to improve facilities and equipment as part of the BC government's Olympic/Paralympic live sites program. Funds have been spent on projects related to sports equipment and upgrades to facilities, arenas, and community centres. Funding has also been spent to improve the viewing of Games events as part of the live sites program.
	Expected to occur at or near the 2010 Winter Games. The outcome is heavily dependent on outcomes of the Games themselves.	Increased national pride	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Coaches and Officials	Expected to begin in 2008, as more international events, using more Canadian officials, are hosted. The experience gained by these officials is believed to lead to increased opportunities post 2010.	Increased participation in coaching and officiating	No impacts noted for 2003 to 2007 period	128,808 coaches were trained through the National Coaching Certification Program from 2004 to 2007, as part of the Canadian Association of Coaches (CAC) objectives.
		Improved training and qualifications	No impacts noted for 2003 to 2007 period	Sport Canada funding to the CAC increased 41% in 2003 to 2007 period. 2010 Legacies Now began contributing \$33,000 annually in 2006/07 to Pro-D Grants for high performance coaches. Sportsfunder distributed \$250,000 in 2006/07 towards coaching grants.
Facilities	Expected to begin in 2008, as 2010 Winter Games facilities are completed and pre-games competitions are held.	More facilities Expanded and upgraded facilities	\$451 million was spent by the federal and provincial governments on 2010 Winter Games venue construction.	\$113 million was spent on 12 community sports facilities across BC: Prince George Northern Sports Centre, SFU Athletic Centre and Stadium, Victoria Pacific Sport Institute, Fort St. John Speed Skating Training Facility, Burnaby Lake Rowing Facility, South Okanagan Event Centre, Nanaimo Ice Centre, Kamloops Field House and Sport Centre, Kimberly Paralympic Training Development Centre, Smithers Arena Expansion, Houston Leisure Facility and John M.S. Lecky Boathouse.

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Elite Athletes	Expected to be realized primarily in winter sports disciplines. They are expected to begin in approximately 2004 and 2005 (the time of the launch of the Own the Podium program). These impacts are expected to grow through 2010. Interest generated by the 2010 Winter Games is believed to provide post-games momentum.	More elite athletes qualifying for 2010 Winter Games	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		Better results	No impacts noted for 2003 to 2007 period	Medal count at the 2006 Olympic Winter Games increased 41% from the 2002 Winter Games. Medal count at the 2006 Paralympic Winter Games decreased 15% from 2002. Canada improved from 4th ranked internationally in winter sports to 2nd in 2007 based on the International World Olympic Sport Index.
		More funding	No impacts noted for 2003 to 2007 period	Own the Podium, a national sport technical initiative, was launched in 2005. The main objective was to help Canada increase its medal count at the 2010 Winter Games. Own the Podium has committed \$110 million of funding from 2005 to 2010. These funds come from a combination of government and private sector resources. The Government of Canada has contributed half, or \$55 million, through Sport Canada. The Province of BC provided \$5 million, the Province of Ontario \$2.5 million and the Province of Manitoba \$0.75 million. An additional \$15 million has come from sponsors. The remaining \$31.75 million is to be raised by VANOC through other sponsors. The total dollar amount of funding for elite athletes including athletes with a disability distributed through National Athlete Assistance Program increased 67% in the 2003 to 2007 period. The amount of funding provided through the Province Athlete Assistance fund was doubled in 2006.
				52.4% more winter sport athletes became carded, and 12.6% more summer sport athletes were awarded carding in the 2003 to 2007 period. In the 2003 to 2007 time frame: funding via Sport Canada to summer National Sport Organizations (NSOs) increased 64.2%. Funding to winter NSOs experienced a growth of 162.0%. Funding to Canadian Sport Centres (CSCs) increased 122.7%. 2010 Legacies Now funding to CSC Pacific increased from \$500,000 to \$3.9 million in the 2003 to 2007 period. 2010 Legacies Now began to fund Sport BC in 2006/07 with a total grant of \$1.9 million, funded BC Athlete Voice with \$200,000 in 2005 to 2007, and funded SportMed BC with \$75,000 for Sport Performance Services.

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Spectators	Expected to begin in 2008, as 2010 Winter Games facilities are completed. Impacts on spectators are expected to peak in 2010, but, with the addition of improved facilities, are expected to continue in the post-games period at a higher level than was the case pre-games.	Increased attendance at sporting events More and better quality events in BC and Canada	No impacts noted for 2003 to 2007 period The City of Vancouver has contributed \$150,000 from 2004 to 2007 to Hosting BC, and the Municipality of Whistler has contributed \$50,000 to Hosting BC in this same period.	No impacts noted for 2003 to 2007 period Sport Canada supported the hosting of 33.3% more international events in Canada for the 2004 to 2007 period. The BC Ministry of Healthy Living and Sport began in 2004 to contribute \$500,000 annually to Hosting BC. 2010 Legacies Now and Tourism BC began in 2004 contributing \$405,175 respectively on an annual basis towards Hosting BC.



Tourism

What was envisioned in the bid phase?

One of the underlying premises of the Winter Games is to showcase the host city and nation — opening the doors of the city to the rest of the world and promoting tourism initiatives. It was envisioned that the 2010 Winter Games would:

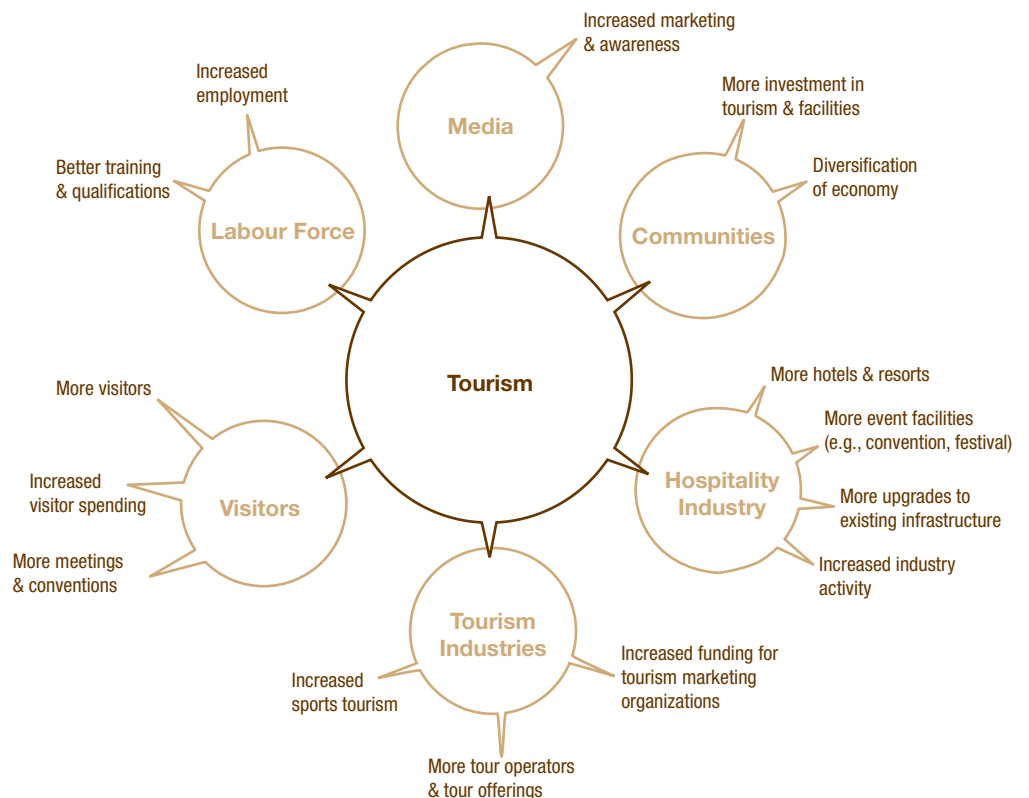
- Provide accessible, high quality, affordable accommodation for volunteers, participants and their families, staff, and security
- Provide optimal transit availability and scheduling to get spectators to and from events
- Provide infrastructure upgrades and additions to improve transportation and access capacity to/from/and within Whistler and Vancouver during and after the Games
- Create world class facilities to host 2010 Winter Games events and commit funding to support facilities and world class events after the Games
- Provide increased tourism to BC beginning no later than 2007 and extending through 2013

Introduction

Tourism encompasses a broad range of sectors in Canada requiring goods and services from a number of industries, including transportation, accommodation, food and beverage services, recreation and entertainment, travel agencies and other industries. Tourism is defined by the World Tourism Organization as “the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”. Globally, tourism is one of the world’s largest economic sectors. In Canada, tourism activities generated approximately 653,400 jobs in 2007. Tourism industry expenditures in 2007 reached \$70.8 billion, a 6.1% increase over 2006. This level of expenditure represents an average annual growth of 2.9% since 2001.

Impact Map

The diagram below shows the tourism constituencies and anticipated impacts of the 2010 Winter Games.



Summary of Tourism Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Media	Expected to begin in 2009 and to peak in 2010.	Increased marketing and awareness	Website hits worldwide more than tripled in the 2003 to 2007 period 35,000 spectators experienced VANOC's presentation at the Turin closing ceremony. An estimated \$30 million in earned media coverage was generated.	More than 125 journalists from 20 countries visited BC-Canada Place at the Turin Games.
Communities	Expected to begin in 2004 through increased investment in tourism infrastructure.	Diversification of the economy More investment in tourism and infrastructure	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Hospitality Industry	Expected to increase significantly in the fall of 2008 and to build through the 2010 Winter Games.	More hotels and resorts	2,700 hotel rooms under construction in Metro Vancouver	No impacts noted for 2003 to 2007 period
		More facilities to host meetings and events	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		More upgrades to existing infrastructure	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		Increased industry capacity and funding for destination marketing	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Tourism Industries	Expected to increase significantly in the fall of 2008 and to build through the 2010 Winter Games.	Increased sports tourism	Small impacts noted: Austria's national ski team began training in 2005 at Sun Peaks Resort. China's national short track speed skating team trained in Kamloops in 2006	2010 Legacies Now BC created 7 sport tourism programs
		More tour operators and tour offerings	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		Increased funding for tourism marketing organizations	No impacts noted for 2003 to 2007 period	Government of Canada announced \$26 million of funding to Canadian Tourism Commission The Province of BC provided an additional \$65 million to Tourism BC from 2005 to 2008
Visitors	Initially expected to begin as early as 2004. However, because of restrictions on marketing efforts prior to the 2008 Beijing Summer Games, tourism marketing efforts have been delayed. At present, impacts on visitors are expected to increase significantly in the fall of 2008 and to build through the 2010 Winter Games.	Increased number and type of meetings and conventions	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		Increased visitor spending	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		More visitors from traditional and new visitor markets	No impacts noted for 2003 to 2007 period	More than 100,000 people visited BC-Canada Pavilion at the Turin Games to learn about BC and Canada.
Labour Force	Expected to begin in 2007 through the introduction of industry training programs. Significant increases in employment are expected to begin in 2009.	Better training and qualifications	VANOC partnered with Superhost programs to deliver Team 2010 training sessions to key stakeholders	Tourism BC's Superhost programs created a customer service training strategy called 2010 Ready and, in conjunction with VANOC, will deliver Team 2010 training sessions to key stakeholders.
		Increased employment	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period

Environmental Sustainability

What was envisioned in the bid phase?

Environmental stewardship has been part of the VANOC and government planning since the inception of Vancouver's bid. It was envisioned that the 2010 Winter Games would:

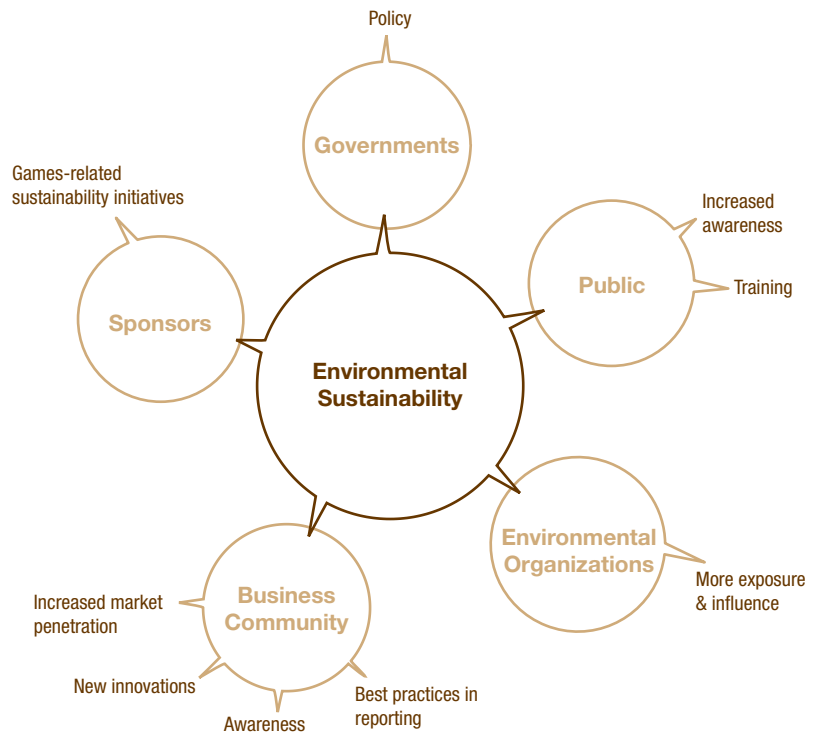
- Showcase the best in building design and construction techniques
- Pursue a zero waste management strategy for the Games
- Move towards a zero net emissions Games that are carbon neutral
- Ensure that significant local features and sensitive environments are protected through landscape buffers and careful land development practices
- Consult with all levels of government, environmental non-governmental organizations (including the Association of Whistler Area Residents for the Environment and the Canadian Parks and Wilderness Society), academia and industry environmental specialists
- Weigh environmental sustainability attributes and commitments when selecting sponsors and suppliers
- Leave a legacy program that advances the understanding and practice of sustainable business operations of official sponsors and suppliers

Introduction

Environmental sustainability refers to the responsible and efficient use of natural resources and systems in generating wealth and well-being for society. The 2010 Winter Games partners have been committed to making the event as environmentally sustainable as possible since the development of Vancouver's bid. However, the larger environmental impact of the 2010 Winter Games may be derived from the use of the Games as a catalyst for change and environmental action throughout society.

Impact Map

The diagram below shows the environmental sustainability constituencies and anticipated impacts of the 2010 Winter Games.



Summary of Environmental Sustainability Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Governments	The BC government has a firm time target of 2010 to work towards in order to showcase its environmental policies during the Games. The impacts of the policies themselves will flow as initiatives and programs are implemented and enforced, largely beyond the timeline of the Games themselves.	New policy	<p>Provincial and federal government environment ministries have conducted environmental studies, performed environmental assessments, and provided environmental consultation to VANOC.</p> <p>Nine environmental assessments have been completed as of 2007. Environment Canada's involvement in these environmental studies focused on air quality, water quality, migrating birds and species at risk. The provincial Ministry of Environment has contributed several ecological studies resulting in a number of environmental improvements (i.e., 30% reduction in ecological footprint at the Whistler nordic venue, relocation of a stream to improve habitat for Western tailed frog).</p>	<p>In 2004, Natural Resources Canada announced funding of \$1.1 million in support of BC's Hydrogen Highway.</p> <p>In 2007, the provincial government legally committed to have all government operations carbon neutral by 2010.</p>
Public	Media coverage is expected to escalate near and during the Games. Public awareness will be related to media coverage with behavioural change following in subsequent years.	Increased awareness	Media hits relating to the 2010 Winter Games and the environment spiked in 2003 when the Games were awarded to Vancouver, and since 2005 are once again rising. 56 written media hits resulted from a Dow Jones Factiva search of 2010 Winter Games environment-related stories in 2007 compared to 4 in 2005.	No impacts noted for 2003 to 2007 period
	Sustainability training for the VANOC workforce is expected to increase as the full-time and volunteer force expands prior to the Games.	Increased training	<p>7 staff hired in the VANOC sustainability branch</p> <p>100% of staff have had sustainability training as part of their orientation; so far estimated to be 548 staff as of July 2007.</p>	No impacts noted for 2003 to 2007 period
Environmental Organizations	Expected to begin in 2003, when the Games were awarded and commitments made to engage with the Environmental Non-government Organizations (ENGO) community.	More exposure and influence	12 consultations with environmental organizations, VANOC, and government partners involving 22 organizations to ensure 2010 Winter Games organizers are considering all aspects of environmental concern and opportunities.	No impacts noted for 2003 to 2007 period

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Business Community	Expected to begin in 2003 when the 2010 Winter Games were awarded and environmental sustainability commitments were formed relating to operations, facilities, and procurement.	New innovations	<p>8 of 9 newly constructed venues are applying for Leadership in Energy and Environmental Design (LEED) certification.</p> <p>4 new innovations introduced to date, including on-site composting of green site material, new LEED Neighbourhood Development Standard, consumption monitoring, solar recovery, and waste-heat harvesting technology at the Vancouver Olympic and Paralympic Village, and a one-of-a-kind roof design using wood affected by the Mountain Pine Beetle.</p>	Innovations and improvements in building design and construction planning were supported by federal and provincial environmental assessments and related studies.
		Market penetration	Games-related contracts for environmentally or sustainably produced goods or services were valued in the tens of millions of dollars as of 2007.	No impacts noted for 2003 to 2007 period
		Increased awareness	No impacts noted for 2003 to 2007 period	4,996 attendees at 178 workshops hosted by the 2010 Commerce Centre between 2003 and 2007. These workshops were hosted to inform small businesses about the opportunities and procedures involved in bidding for 2010 Winter Games contracts. Environmental sustainability was incorporated into these workshops.
		Best practices in reporting	2 sustainability reports published and 1 Olympic Global Impact (OGI) report submitted to the IOC to date	Environment Canada recommendations on carbon footprint methodology
Sponsors	Expected to begin in 2003 when the Games were awarded and environmental sustainability commitments were made.	Games-related sustainability initiatives	Supported by 2010 Winter Games organizers, the Sponsor Sustainability Initiative was formed in 2007 for sponsors to share and collaborate in games-related sustainability initiatives.	No impacts noted for 2003 to 2007 period

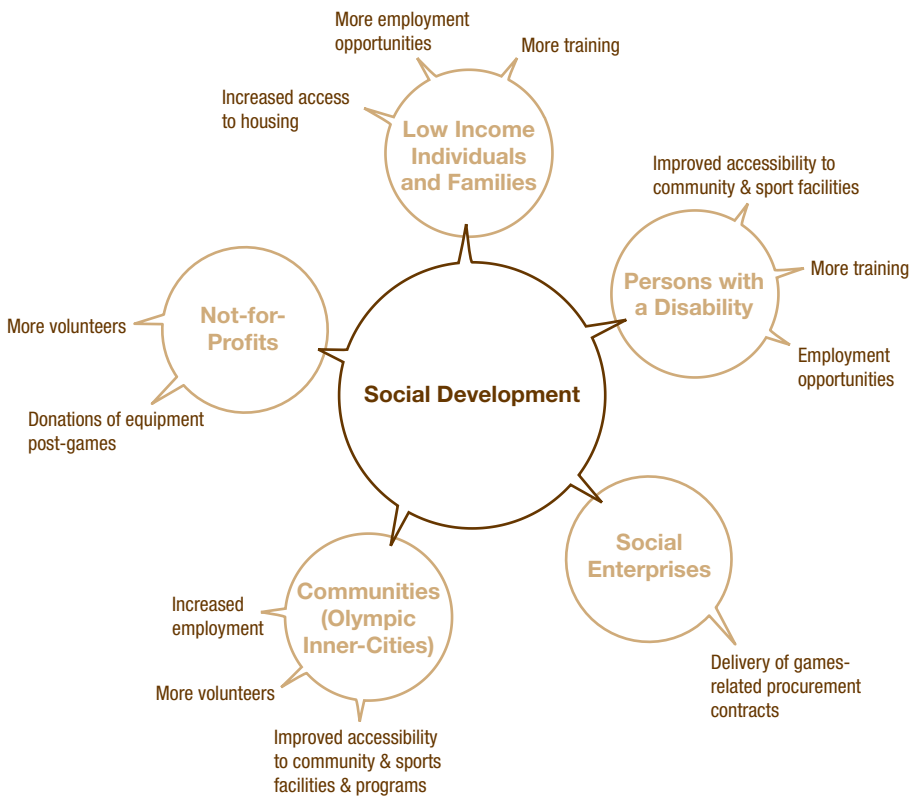
Social Development

Introduction

There are many definitions of the term social development. One broad definition is that social development is making a commitment to individual well-being and inclusion and empowerment to increase equity and access to markets and services for all. Social development is also sometimes more narrowly defined as the growth and expansion of opportunities for the low income portion of the population. Our impact analysis seeks to capture the broad impacts of the 2010 Winter Games on key constituency groups across a range of communities, groups, and individuals.

Impact Map

The diagram below shows the social development constituencies and anticipated impacts of the 2010 Winter Games.



What was envisioned in the bid phase?

References to opportunities for social development in the VANOC business plan and bid book envisioned that the 2010 Winter Games would:

- Create barrier free access to sport and community facilities
- Develop accommodations that will become post-games non-market housing
- Enhance the talent pool for inner-city communities and Aboriginal people for the post-games market
- Promote equality and inclusivity in procurement and hiring practices
- Develop a new model for governments and community to work together to address social issues with community engagement
- Create sports endowment programs
- Leave sustainable legacies for sport medicine and sport science, locally and nationally, following the 2010 Winter Games

Summary of Social Development Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Low Income Individuals and Families	Expected to begin in March 2010 as this is tied to freeing up of Games housing in the athletes' village.	Increased number of housing units available	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period Indirect changes in housing opportunities are happening; however, we are unable to attribute any impact to the 2010 Winter Games themselves.
	Expected to begin in 2004 as employment and training are tied to the start-up date of VANOC employment.	More employment opportunities	VANOC has procured over \$2 million from organizations such as United We Can, Potluck Café, and Mills Basics whose operations support inner-city improvement goals.	No impacts noted for 2003 to 2007 period
		More training opportunities	64 job training opportunities in RONA fabrication shop	141 individuals enrolled in the Building Opportunities with Business (BOB) program that helps prepare people previously unemployable and move them to be employable A directory of 217 inner-city businesses providing construction and related services developed and distributed to construction managers and sub-trades
Persons with a Disability	Expected to begin in 2010 as this is tied to freeing up of post-games facility capacity. Impact likely to start occurring as venues come online and are usable by the general public. In some instances, this will start in 2008.	Improved accessibility to community and sports facilities	Upgrades to four facilities completed: Cypress Mountain, Olympic/Paralympic Park, Whistler Creekside, and the Pacific Coliseum.	2010 Legacies Now provided over \$1.2 million to promote accessibility within BC communities.
	Expected to begin in 2004 as employment and training are tied to the start-up date of VANOC employment.	More training opportunities Employment opportunities	No impacts noted for 2003 to 2007 period No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period A directory of 217 inner-city businesses providing construction and related services developed and distributed to construction managers and sub-trades
Social Enterprises	Expected to begin in 2004 as tied directly to the start-up date of VANOC procurement.	Delivery of games-related procurement contracts	Results are minor to date. Impact expected to be of consequence starting in 2008.	No impacts noted for 2003 to 2007 period
Communities (Olympic Inner-Cities)	Expected to begin in 2010 as tied to volunteers completing their work with the Games.	Improved accessibility to community and sports facilities and programs (sport, health)	No impacts noted for 2003 to 2007 period	The Province of BC, VANOC and 2010 Legacies Now provide a speakers bureau that offers speakers of various types to communities. By 2007, 318 speakers at various events reached an audience of 41,083 people.
		More volunteers	No impacts noted for 2003 to 2007 period	2010 Legacies Now created an internet tool that links volunteers and event organizations to increase the number of experienced volunteers available to the 2010 Winter Games.
	Expected to begin in 2004 as employment and training are tied to the start-up date of VANOC employment.	Increased employment	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Not-for-Profits	Expected to begin in 2010 with the increase in volunteers completing their work with the Games.	More volunteers	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
	Expected to begin in March 2010 as this is tied to freeing up of games-related equipment.	Donations of equipment post-games	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period

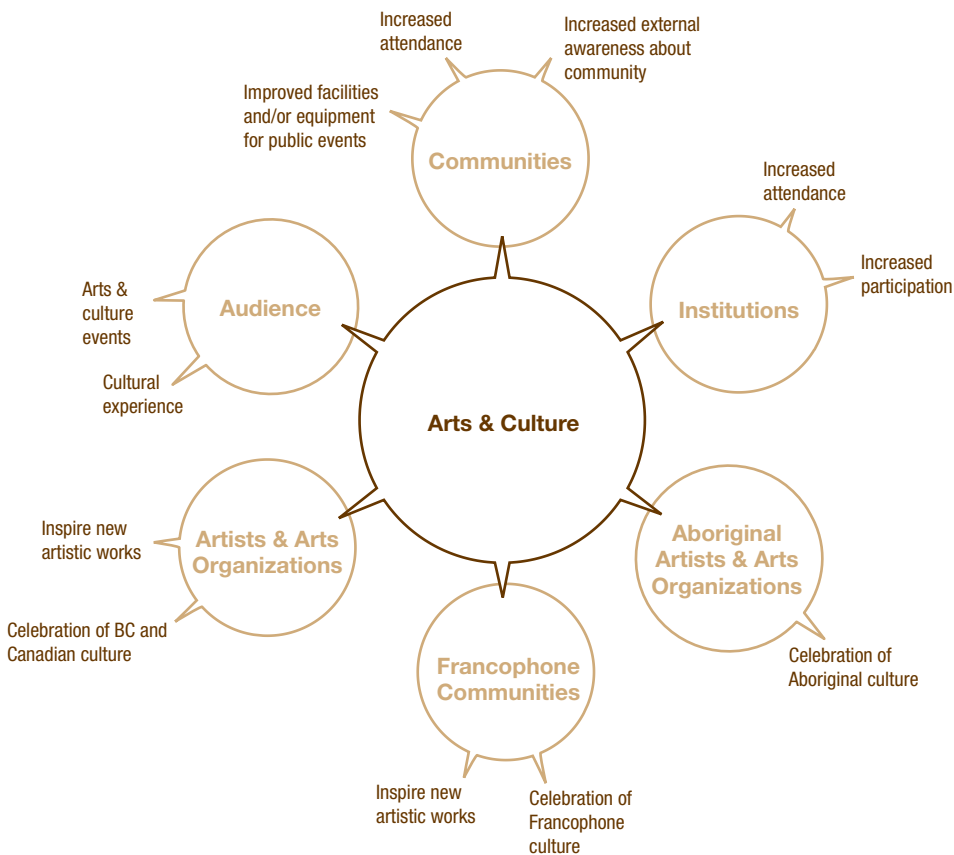
Arts and Culture

Introduction

The Winter Games provide the host community with an opportunity to express its culture in a way that the world can experience. For British Columbians and Canadians, the 2010 Winter Games are an opportunity to celebrate the diversity of our culture and share it with others.

Impact Map

The diagram below shows arts and culture constituencies and anticipated impacts of the 2010 Winter Games.



What was envisioned in the bid phase?

There are several references to what can be defined as opportunities for arts and culture in the VANOC business plan. It was envisioned that the 2010 Winter Games would:

- Produce a series of cultural programs including the Cultural Olympiad and Olympic and Paralympic Arts Festivals
- Enhance the experience of the 2010 Winter Games through a celebration of arts, culture and creativity
- Broaden and extend the scope of the 2010 Winter Games by maximizing the participation of the local, national and global community in an outstanding display of artistic and cultural endeavour
- Highlight fundamental aspects of our unique culture, such as Canada's multicultural makeup, Anglophone, Francophone, and Aboriginal people
- Reflect Canadians' character as creators, innovators, and contributors to world progress

Summary of Arts and Culture Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Communities	<p>For the host city, expected to begin in 2008 with the introduction of the Cultural Olympiad series. Impacts on Vancouver are expected to increase in 2009, peaking in 2010 with the Olympic and Paralympic Arts Festivals and celebration sites.</p> <p>For the host mountain resort city, expected to begin in 2003 with the introduction of the annual Celebration 2010™ series. Impacts on Whistler are expected to peak in 2010 with the Olympic and Paralympic Arts Festivals, continuing into 2011.</p>	<p>Improved facilities and/or equipment for public events</p> <p>Increased attendance of arts and culture events</p> <p>Increased external awareness about the community</p>	<p>In 2003, the first annual Celebration 2010™ arts festival was held. By 2007, it featured 18 events with 100 artists and performers with an estimated 16,000 people attending (41,000 for 2003 to 2007).</p> <p>The Whistler Arts Council is building capacity by creating partnerships and establishing relationships throughout the community.</p>	No impacts noted for 2003 to 2007 period
Institutions (museums, galleries, other exhibit spaces)	Expected to begin in 2008 with the first Cultural Olympiad, continuing in 2009 and peaking during the Games in 2010.	<p>Increased attendance</p> <p>Increased participation</p>	Several galleries, museums, and other exhibit spaces are planned as venues for the Cultural Olympiads.	No impacts noted for 2003 to 2007 period
Aboriginal Artists and Arts Organizations	Expected to begin in 2007 with the introduction of the Arts Partners in Creative Development (APCD) program. Additional impacts will occur during the Cultural Olympiads being held in 2008 and 2009 and will peak in 2010 with the Olympic and Paralympic Arts Festivals.	Celebration of Aboriginal culture	No impacts noted for 2003 to 2007 period	The Bill Reid Foundation received \$200,000 from the APCD program in 2007.
Francophone Communities	Expected to occur at times similar to the timing noted for Artists and Arts Organizations.	<p>Inspire new artistic works</p> <p>Celebration of Francophone culture</p>	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Artists and Arts Organizations	Expected to begin in 2007 as funding becomes available through APCD to support the creation and development of original works. Impacts are expected to continue to build through 2009 and to peak in 2010 with the presentation of the Olympic and Paralympic Arts Festivals.	<p>Inspire new artistic works</p> <p>Celebration of BC and Canadian culture</p>	No impacts noted for 2003 to 2007 period	In 2007, approximately \$1.1 million was allocated to nine arts organizations from the APCD program.
Audience	Expected to begin with the closing ceremony of the 2006 Winter Games held in Turin. Further impacts on audience members are expected to begin in 2008 with the first Cultural Olympiads, continuing in 2009 and peaking in 2010.	<p>Participation in cultural experience</p> <p>Increased attendance at arts and cultural events</p>	35,000 spectators experienced VANOC's presentation at the Turin closing ceremony in 2006. 500 million people were anticipated to view this performance. An estimated \$30 million in earned media coverage was generated.	China Central Television and CBC broadcast "China Hand-in-Hand Celebration of the Olympics" held at the Pacific Coliseum in Vancouver.

Economic Development

Introduction

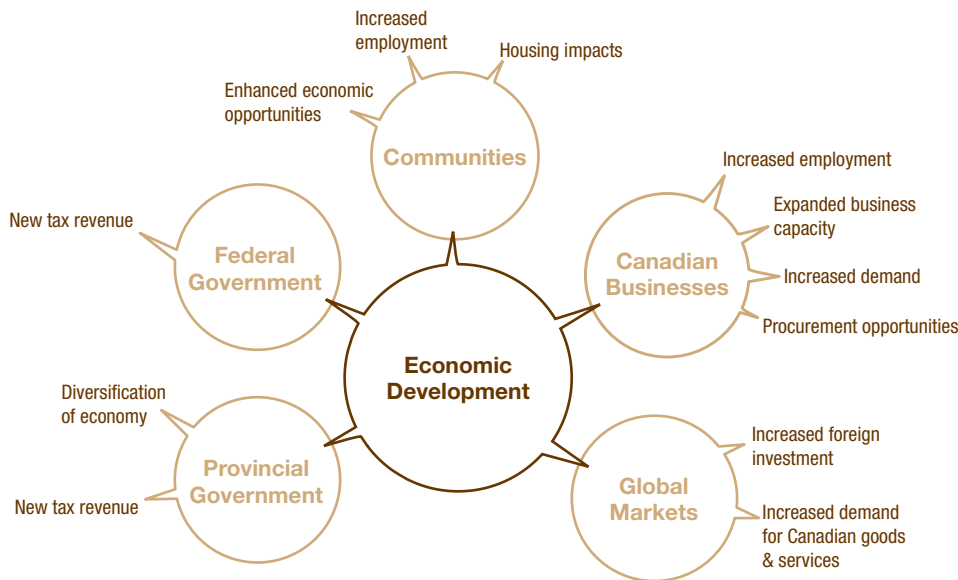
Economic development is the means through which communities improve the quality of life for their residents by generating new economic wealth. Economic development is achieved through the implementation of public policy, and delivery of public and private investment. According to the International Economic Development Council, increased prosperity in the community and for business occurs when the following objectives are realized:

- Private enterprise is advanced
- High-quality jobs are created
- New personal income is generated
- The tax base is increased

In a complex system like the provincial or national economy, it is challenging to isolate the economic effects of the 2010 Winter Games investment and activity from regular business cycle impacts. We have utilized various modeling techniques to isolate, to the extent possible, impacts specifically attributable to the 2010 Winter Games.

Impact Map

The diagram below shows the economic development constituencies and anticipated impacts of the 2010 Winter Games.



What was envisioned in the bid phase?

Opportunities for economic development in the VANOC business plan and bid book noted that the 2010 Winter Games would:

- Provide procurement opportunities for British Columbian and Canadian suppliers of goods and services that can be conducted sustainably, helping to generate jobs and access to training for Aboriginal communities, persons with a disability, at-risk women and youth, and visible minorities
- Create jobs in the construction, hospitality, tourism, transportation, retail and related sectors
- Provide business development opportunities to increase international awareness of British Columbia and Canada as a place to invest and do business
- Improve infrastructure such as the construction of sport venues and housing that will enhance the quality and availability of community resources

Summary of Economic Development Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Communities	<p>Increase in economic activity generated by construction of venues and other Games delivery activities expected to begin after the award of the Games in 2003 and to continue until the conclusion of the Games in 2010.</p> <p>Supplementary initiatives designed to leverage the 2010 Winter Games expected to impact economic development in the post-games years.</p>	Increased employment	The 2010 Winter Games are estimated to have produced between 8,300 and 10,500 jobs in BC from 2003 to 2007. Moreover, we have estimated that a further 890 jobs were generated across Canada through intra-provincial trade with BC.	No impacts noted for 2003 to 2007 period
		Housing impacts (prices and availability)	<p>Residential investment and housing prices were both indirectly impacted by the 2010 Winter Games via an induced increase in migration and employment.</p> <p>We have estimated that housing starts in BC over 2003 to 2007 were 0.4% higher due to 2010 Winter Games induced impacts.</p> <p>We have also estimated that by 2007, the average home price in BC was \$3,400 higher than it would have been under a scenario with no 2010 Winter Games.</p>	No impacts noted for 2003 to 2007 period
		Enhanced economic opportunities	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
		Canadian Businesses	<p>Economic development impacts for Canadian businesses are expected to begin with construction of venues in 2004.</p> <p>These impacts are anticipated to occur from 2004 to 2010 with the potential for long-run impacts from investment and employment to last beyond the 2010 Winter Games.</p>	2010 Winter Games specific procurement
		Expanded business capacity	Non-residential investment is composed of investment in the capital stock of BC. This includes investment in non-residential construction and in machinery and equipment. We estimate that investment related to the 2010 Winter Games has contributed 0.2% to the capital stock of BC.	No impacts noted for 2003 to 2007 period
		Increased demand	Expenditures related to venue construction and 2010 Winter Games preparation are estimated to have added between 0.26% and 0.33% (\$370–\$470 million) to real GDP for BC from 2003 to 2007 and to have generated an additional \$77 million in real GDP for Canada.	No impacts noted for 2003 to 2007 period
		Increased employment	The 2010 Winter Games are estimated to have produced between 8,300 and 10,500 jobs in BC from 2003 to 2007. Moreover, we have estimated that a further 890 jobs were generated across Canada through intra-provincial trade with BC.	No impacts noted for 2003 to 2007 period

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Global Markets	The impact on global markets, such as trade and investment, are expected to take place post-games.	Increased foreign investment in Canada Increased demand for Canadian goods and services (exports)	No impacts noted for 2003 to 2007 period	BC-Canada Pavilion at the Turin Winter Games allowed more than 80 BC businesses to connect with international audiences and showcase their products and services.
Provincial Government	The provincial government is expected to benefit from the increase in economic activity around Games delivery starting in 2003. The majority of impacts from 2003 to 2007 are expected in the construction sector.	Diversification of the economy	The GDP impacts related to the 2010 Winter Games were distributed across several sectors, though most prominently in the construction industry. We have estimated that construction impacts account for approximately 52% of GDP impacts from 2003 to 2007.	No impacts noted for 2003 to 2007 period
		New tax revenue	The 2010 Winter Games are estimated to have generated between \$42.6 million and \$54.3 million in provincial tax revenues.	No impacts noted for 2003 to 2007 period
Federal Government	The federal government is expected to benefit from the increase in economic activity from 2003. Further long-term impacts should be realized as initiatives are put in place to leverage the Games beyond 2010.	New tax revenue	The 2010 Winter Games are estimated to have generated between \$37.9 million and \$48.1 million in federal tax revenues.	No impacts noted for 2003 to 2007 period

Employment

What was envisioned in the bid phase?

There are several references to what can be defined as opportunities for employment in the VANOC business plan and bid book including:

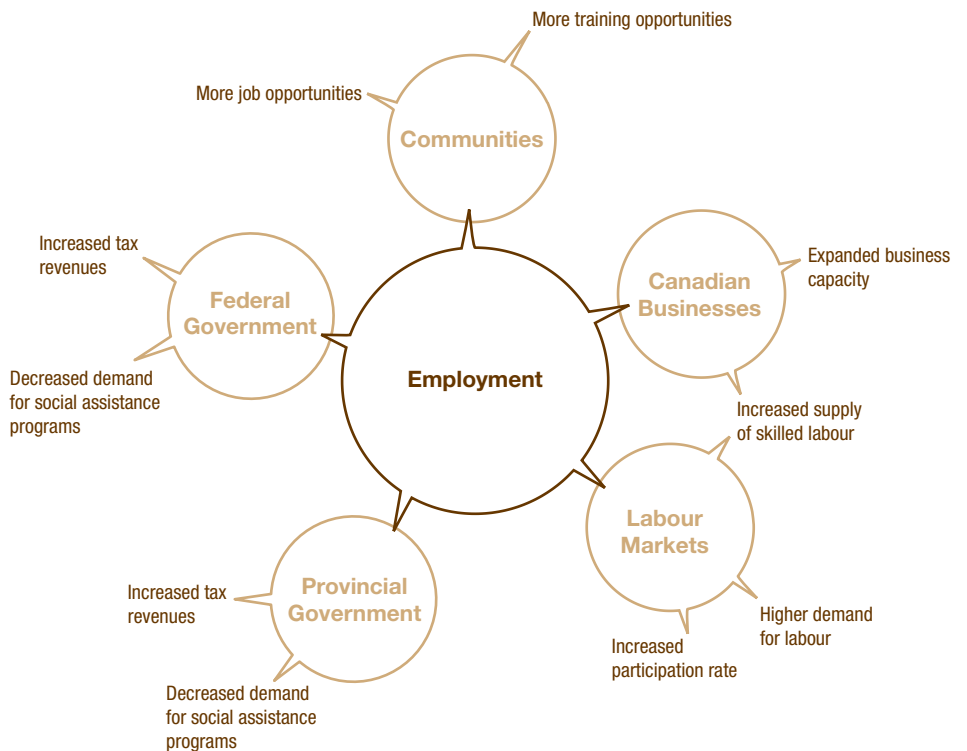
- Leave a skills development legacy and a diverse talent pool that includes individuals from various groups of interest such as Vancouver's Downtown Eastside, Aboriginal and Francophone populations and persons with a disability in the post-2010 market
- Leave a legacy of experienced BC and Canadian expertise as a result of the scale of the event and, in particular, the opening and closing ceremonies
- Provide employment in the construction of venues
- Provide employment related to hospitality, tourism, transportation and retail

Introduction

The 2010 Winter Games will provide employment opportunities across several industry sectors. Most prominent are the employment opportunities in construction during the build-up to the Games. Other key sectors to benefit from the 2010 Winter Games include hospitality, tourism, transportation and retail. In addition to job creation, the capacity of the labour force in these sectors will likely increase because of the expanded skill sets needed to deliver the Games. Access to employment opportunities is intended to be inclusive; as such, it is expected there will be employment opportunities for Aboriginal people, individuals living in the inner-city, and persons with a disability.

Impact Map

The diagram below shows the employment constituencies and anticipated impacts of the 2010 Winter Games.



Summary of Employment Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Communities	Expected to begin after the award of the 2010 Winter Games in 2003 and to continue until the conclusion of the Games.	More job opportunities	The 2010 Winter Games are estimated to have produced between 8,300 and 10,500 jobs. Employment generated in other provinces primarily through inter-provincial trade with BC is estimated at 890 jobs from 2003 to 2007.	150 Aboriginal individuals employed out of Vancouver Aboriginal Skills and Employment Training Society (VanAsep) CORE program
	Employment impacts of increased participation, training, and wages are expected to continue beyond 2010.	More training opportunities	No impacts noted for 2003 to 2007 period	141 individuals enrolled in the Building Opportunities with Business (BOB) program; 315 individuals received CORE training from VanAsep
Canadian Businesses	Expected impacts are anticipated to occur from 2004 to 2010. There may also be lasting impacts of training and capacity beyond 2010.	Expanded business capacity Increased supply of skilled labour	Employment growth from the 2010 Winter Games led to an unemployment rate that was between 0.2% and 0.3% lower than it would have been without the Games. Migration to BC induced by economic growth attributable to the 2010 Winter Games is estimated at between 1,600 and 2,300 people (about 0.7% to 1.0% of total net migration to BC).	No impacts noted for 2003 to 2007 period
Labour Markets	The impact of the 2010 Winter Games on the BC labour market is expected to occur following the award of the Games and to continue until their conclusion.	Increased supply of skilled labour	Employment growth from the 2010 Winter Games led to an unemployment rate that was between 0.2% and 0.3% lower than it would have been without the Games. Much of the employment generated in the 2003 to 2007 period was in construction and related industries. Of the 78,800 construction jobs registered from 2003 to 2007, we would attribute roughly 2,700 to the 2010 Winter Games. (Note: We estimate the total number of jobs, both direct and indirect, created by construction activity to have been 5,140.)	No impacts noted for 2003 to 2007 period
		Higher demand for labour	Employment growth from the 2010 Winter Games led to an unemployment rate that was between 0.2% and 0.3% lower than it would have been without the Games.	No impacts noted for 2003 to 2007 period

Employment

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Government Leveraging Impacts
Provincial Government	Expected to begin after the award of the 2010 Winter Games in 2003 and to continue until the conclusion of the Games.	Increased tax revenues	The 2010 Winter Games are estimated to have generated between \$42.6 million and \$54.3 million in provincial tax revenues.	No impacts noted for 2003 to 2007 period
		Decreased demand for social assistance programs	Increased employment generated by the 2010 Winter Games is consistent with a decline in social assistance payments of between 0.92% and 1.15%.	No impacts noted for 2003 to 2007 period
Federal Government	Expected to begin in 2003 and to continue until the conclusion of the Games. Expected to begin in 2003 and to extend beyond 2010.	Increased tax revenues	The 2010 Winter Games are estimated to have generated between \$37.9 million and \$48.1 million in federal tax revenues.	No impacts noted for 2003 to 2007 period
		Decreased demand for social assistance programs	Increased employment generated by the 2010 Winter Games is consistent with a decline in social assistance payments of between 0.92% and 1.15%.	No impacts noted for 2003 to 2007 period

Business Development

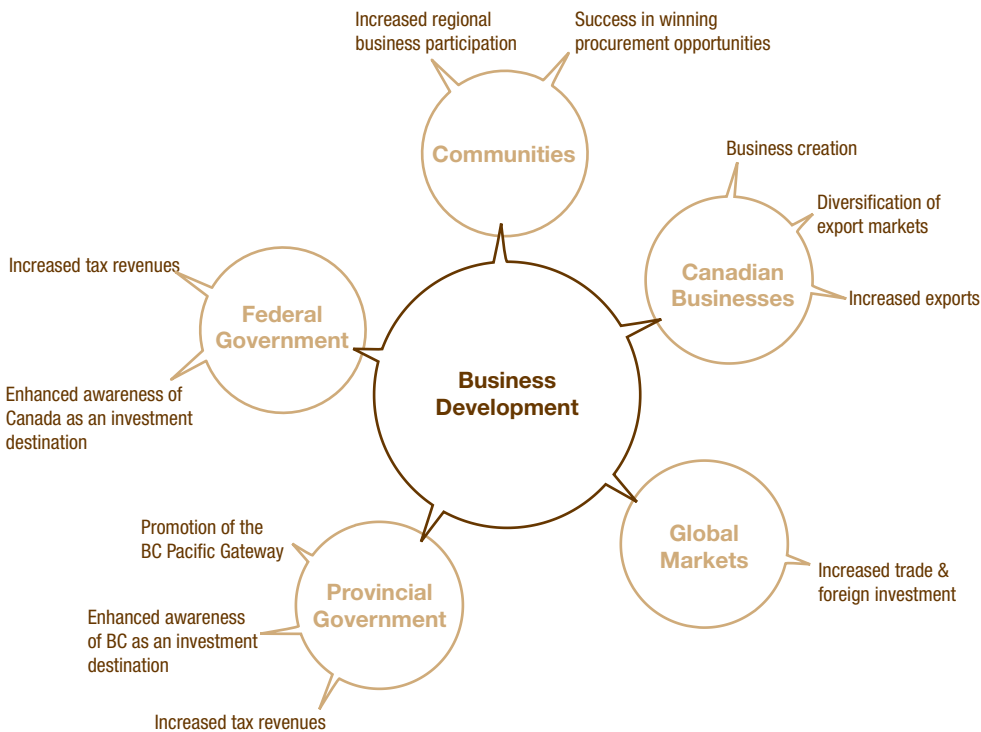
Introduction

Business development covers a wide spectrum of activities across numerous sectors. Export development and investment are key features of our open, trade oriented economy and are essential to ensure future economic growth and prosperity. For these reasons, government support programs for business development typically focus on the following:

- Business creation and expansion
- Foreign investment attraction and retention
- Export trade capabilities

Impact Map

The diagram below shows the business development constituencies and anticipated impacts of the 2010 Winter Games.



What was envisioned in the bid phase?

The international exposure from the 2010 Winter Games has the potential to create a unique opportunity to profile British Columbian and Canadian products and services on the Olympic world stage, attract new investment, expand export/import markets, and build new business partnerships from around the world.

Some of the broader business development objectives of hosting the 2010 Winter Games include:

- Showcase goods and services including those from sustainable and knowledge-based industries and value-added sectors
- Increase trade readiness of BC/ Canadian companies
- Promote sector-based trade and investment with target countries
- Enhance the world class tourism image of British Columbia while building a strong business image
- Provide benefits to small and medium enterprises (SMEs) and to communities

Summary of Business Development Impacts 2003–2007

Constituencies	Expected Timing of Impacts	Anticipated Impacts	Games Hosting Activity Impacts	Federal and Provincial Leveraging Impacts
Communities	Business development is expected to benefit from the procurement and marketing activities from 2004 to 2010. If successful, all communities should realize long-term, post-games benefits from relationships and skills gained from business development initiatives.	Increased regional participation in federal and provincial marketing programs Success of BC firms in winning procurement opportunities	No impacts noted for 2003 to 2007 period	The 2010 Commerce Centre hosted 178 procurement and other business workshops across BC, attracting close to 5,000 participants. In addition, the federal government held 18 workshops across Canada attracting more than 500 participants. BC-based companies have been successful in 176 procurement bids from 2003 to 2007. Canadian companies overall have won 190 procurement bids.
Canadian Businesses	Business development is expected to benefit from the procurement and marketing activities from 2004 to 2010. Businesses will also benefit in the long-run from enhanced export opportunities and the creation of new relationships with foreign firms and investors.	Increased exports Diversification of export markets Business creation	No impacts noted for 2003 to 2007 period No impacts noted for 2003 to 2007 period We have estimated that as much as 5% of new business creation in BC can be attributable to the increase in economic growth due to the 2010 Winter Games.	No impacts noted for 2003 to 2007 period No impacts noted for 2003 to 2007 period There are 887 businesses that have been operating for less than five years registered for procurement opportunities with the 2010 Commerce Centre. 2010 Business Network created to allow direct access to notification of procurement opportunities from VANOC. By 2007, 1,114 businesses had registered.
Global Markets	These impacts will likely occur in the long-run (after 2010) as new business relationships are created between Canadian and foreign firms and investors.	Increased trade and foreign investment	No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period
Provincial Government	Impacts from the promotion of BC as a Pacific Gateway to Asian markets have the potential to leverage the business development impact of the Games beyond 2010. However, these impacts may take years to be realized. Therefore, we anticipate few measurable impacts before 2010.	Increased tax revenue from enhanced economic activity Enhanced awareness of BC as an investment destination Promotion of Pacific Gateway strategy for enhanced trade with Asia	The 2010 Winter Games are estimated to have generated between \$42.6 million and \$54.3 million in provincial tax revenues. No impacts noted for 2003 to 2007 period No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period BC-Canada Place at the Turin Winter Games allowed more than 80 BC businesses to connect with international audiences and showcase their products and services. 22 ThinkAsia workshops, with 600 attendees, were held in 2007.
Federal Government	Impacts from the promotion of BC as a Pacific Gateway to Asian markets have the potential to leverage the business development impact of the Games beyond 2010. However, these impacts may take years to be realized. Therefore, we anticipate few measurable impacts before 2010.	Increased tax revenue from enhanced economic activity Enhanced awareness of Canada as an investment destination	The 2010 Winter Games are estimated to have generated between \$37.9 million and \$48.1 million in federal tax revenues. No impacts noted for 2003 to 2007 period	No impacts noted for 2003 to 2007 period No impacts noted for 2003 to 2007 period

Aboriginal Participation in the 2010 Winter Games

Introduction

Aboriginal participation is an important component of VANOC's sustainability mandate. The 2010 Winter Games mark the first time in Olympic history that indigenous peoples have been recognized by the IOC as full partners in the Olympic and Paralympic Games.

The 2010 Winter Games are being held within the traditional territories of four BC First Nations. As a result, the Squamish, Lil'wat, Musqueam and Tseil-Waututh are the official hosts of the Games. The four communities have formed the Four Host First Nations Society (FHFN) to work with VANOC and other partners to maximize opportunities for participation in the 2010 Winter Games by First Nations, Métis and Inuit peoples across Canada. The FHFN was provided initial funding of \$2 million by the Government of Canada and \$400,000 by the Province of BC. The FHFN is also committed to facilitating collaboration between the Nations and VANOC so that the Nations' interests and cultures are respected and represented in the planning and staging of the Games.

Impact of the 2010 Winter Games on Aboriginal Peoples and Communities

To identify the impact of the 2010 Winter Games on Aboriginal peoples and communities, information is presented for each of the eight topic areas. In addition, information will be gathered on the two elements not covered within the eight topic areas: partnerships and collaboration, and education and awareness.

Partnerships and Collaboration

During 2003 to 2007, implementing the strong relationships and partnerships that would encourage and result in unprecedented Aboriginal participation in the 2010 Winter Games was a primary focus. This commitment to partnerships and collaboration had the greatest initial impact on the four "host" First Nations, through the signing of the legacy agreements and the establishment of the Four Host First Nations Society and Secretariat. Initially formalized in agreements, memoranda of understanding and initiatives with each of the four First Nations, the commitment to collaboration was launched in a broader sense with the signing of the protocol between VANOC and the FHFN in 2005, with the parties pledging to ensure that opportunities to participate in all aspects of the 2010 Winter Games would be extended to other Aboriginal peoples across Canada. In 2007, engagement of national Aboriginal representative groups and regional organizations began with the first of a series of memoranda of understanding with Aboriginal political organizations (the Assembly of First Nations) and statements of cooperation with non-political organizations and partners (Aboriginal Tourism BC). Other such arrangements will be formalized in 2008, and specific impacts resulting from them should be able to be measured in the next reporting period.

What was envisioned in the bid phase?

Local First Nations and urban Aboriginal organizations recognized the importance of early involvement in the bid process and the Four Host First Nations played an important role in working with Vancouver 2010 to bring the Games to Canada. The bid book noted the richness of First Nation cultures and the importance of reflecting Aboriginal traditions. Specific references note that the 2010 Winter Games would:

- Create a shared legacy agreement with the First Nations
- Generate a commitment by Vancouver 2010 and the provincial government to recognize the legal obligation to consult with First Nations on activities that may infringe on their Aboriginal rights and title
- Involve Vancouver's Aboriginal organizations in some of the programs to be included in the Cultural Olympiad
- Involve First Nations in the opening and closing ceremonies
- Involve First Nations in the design of the Nordic Centre, and include the participation of Squamish and Lil'wat Nations in its development
- Create contracting opportunities for First Nations and Aboriginal businesses
- Create membership of the Squamish and Lil'wat First Nations in the Whistler Legacy Society
- Create a housing legacy for First Nations, consisting of some of the pre-manufactured facilities comprising the Whistler Olympic Village that would be moved offsite after the Games
- Develop a comprehensive agreement on shared legacies with the Squamish and Lil'wat First Nations, whose traditional territories overlap the Callaghan Valley area
- Include participation of the Lil'wat and Squamish First Nations on the project team for the Callaghan Valley

Education and Awareness

During 2003 to 2007, the focus was on community outreach, workshops on specific topics, and establishing the information sharing infrastructure to reach a broader audience. VANOC and the FHFN co-hosted a series of community update sessions and events in each of the four communities, and VANOC also held an update and celebration with 350 members of the Greater Vancouver urban Aboriginal community in collaboration with 2010 Legacies Now. Visits to schools and communities in the three northern territories were also undertaken by VANOC. Specific workshops included information for Aboriginal artists, brainstorming sessions on the Aboriginal pavilion and opening/closing ceremonies, and an appropriate use roundtable. Awareness of Aboriginal participation in the 2010 Winter Games has also been enhanced through refreshing the Aboriginal participation section of the Vancouver 2010 website, launching seven Aboriginal-specific feature stories, and establishing the FHFN website. Education and awareness initiatives in 2008 will continue to encourage participation of Aboriginal people in all aspects of the Games, as well as showcasing information about Aboriginal peoples in Canada to a broader audience. The impact of the education and awareness initiatives is difficult to measure at this point.

Arts and Culture

Aboriginal arts and culture were showcased during the 2003 to 2007 period, with the FHFN participating in and/or promoting such events as the 2010 Olympic/Paralympic logo launch, the FHFN logo launch, a protocol and planning workshop, and the BC Ferries launch in Flensburg, Germany. In addition, the FHFN Chiefs extended an invitation to the world during the closing ceremonies of the 2006 Winter Games in Turin. The appropriate use roundtable hosted by the FHFN in collaboration with the Department of Canadian Heritage brought together Aboriginal artists, cultural organizations and international representatives to address the issues around authenticity and protection mechanisms.

In 2007, the Bill Reid Foundation received a \$200,000 Arts Partners in Creative Development (APCD) grant to commission works for an exhibition from multiple artists. As well, the FHFN has been active during the reporting period in ensuring that Aboriginal peoples, communities and organizations have the opportunity for involvement in all aspects of cultural programming during the 2010 Winter Games.

Business and Economic Development

In general, economic impacts attributable to the 2010 Winter Games have been generated mainly through the construction of Games venues financed by the federal government and other partners of the Games, and through VANOC operating expenditures. There were measurable impacts relating to Aboriginal economic development in the area of procurement, with \$46 million in venue construction contracts awarded to self-identified Aboriginal businesses between September 2003 and July 2007. An additional \$118,000 in non-venue contracts was awarded to Aboriginal businesses during the same reporting period.

As with the other impact areas, there was a focus on promoting partnerships and collaboration and raising awareness of opportunities through events, including the VANOC 2010 Aboriginal Recruitment and Procurement Symposium (50 stakeholders from across Canada) and the 2010 Aboriginal Business Summit in 2007, which was co-hosted by the FHFN, the Province of BC and the Government of Canada and attracted 470 participants from all parts of Canada.

It has been difficult to extract any data on the creation of new Aboriginal businesses between 2003 and 2007 that could be specifically attributable to the 2010 Winter Games. Aboriginal businesses did participate in the business opportunity workshops hosted by the 2010 Commerce Centre during 2005 and 2006. Further initiatives are planned in 2008 to implement a comprehensive Aboriginal procurement strategy developed by VANOC, including the hiring of a full-time Aboriginal procurement specialist and an Aboriginal business development and business specialist. The Aboriginal Licensing and Merchandising Program announced in 2007 will also create opportunities in 2008 and beyond for Aboriginal businesses and organizations to market merchandise with Aboriginal themes under the Olympic brand.

Employment

The BC economy enjoyed strong employment growth in most sectors, particularly in construction. The measurable impact on Aboriginal employment and training can be mostly attributed to construction, as well as to operating expenditures and investments relating to 2010 Winter Games preparation and specific investments in Aboriginal employment training initiatives. Direct employment was generated through the hiring of Aboriginal people by the FHFN Secretariat and VANOC (1.2 percent of staff according to the Vancouver Sustainability Report, 2006–2007). In 2007, VANOC hired a full-time Aboriginal recruitment specialist to implement its Aboriginal Recruitment Strategy, designed to identify and recruit Aboriginal peoples locally and throughout Canada for paid or volunteer work at VANOC.

Federal funding to the Vancouver Aboriginal Skills and Employment Training Society (VanAsep) organization has contributed to measurable impacts in connecting Aboriginal peoples to job and training opportunities arising from major construction projects associated with the 2010 Winter Games. VanAsep is a non-profit society managing \$21 million in funding under the National Aboriginal Skills and Employment Partnership to deliver labour market programming and establish linkages between Aboriginal communities and the construction industry, and has reported the following results to 2007:

- 800 screening assessment tests were distributed to four Aboriginal Human Resources Development Agreements
- 315 individuals received CORE training
- 150 people were employed as a result of CORE training
- 175 people received skills training
- 136 direct to employment clients

Environmental Sustainability

No specific measures for environmental sustainability relating to Aboriginal participation in the 2010 Winter Games were identified in this report. Impact measures should be considered for the next report.

Social Development

The specific impact measures in this area include increased housing opportunities and as yet undefined impacts resulting from the 2010 Legacies Now initiatives and the legacy agreements with the FHFN. During the 2003 to 2007 period, no measurable impacts were noted in housing or housing opportunities, as increases in social housing units and housing legacies are expected after the Games. In 2002, the Vancouver 2010 Bid Corporation (later VANOC) and the provincial government signed shared legacy agreements with the Squamish and Lil'wat First Nations.

Sport Development

Most of the activity noted in Aboriginal sport development has been focused on inspiring participation in sport and encouraging Aboriginal athletes to participate in the 2010 Winter Games through a variety of initiatives, including:

- Aboriginal Youth Sport Legacy Fund, created in 2002 with three programs to support Aboriginal youth in BC (2010 Legacies Now serves as trustee). In 2007, eight high-performance athlete assistance grants were provided to Aboriginal athletes in snowboarding, wrestling, hockey and soccer; seven Aboriginal students received post-secondary scholarships for programs of study in sport or recreation; and community grants were awarded to 43 Aboriginal communities and organizations throughout BC.
- Aboriginal Athlete Poster Series, launched by VANOC in 2007. Over 45,000 "Find Your Passion in Sport" posters featuring three Aboriginal athletes were distributed to Aboriginal communities and youth across Canada.
- Aboriginal Snowboarding Team, which has grown from 10 to over 260 members in five years and won several medals in BC snowboarding competitions since 2005. Teck Cominco, a 2010 sponsor, financially supported three team members who are aiming towards medal contention in 2010.
- Aboriginal Youth Sport Talent Identification and Sport Fit Events, hosted by the FHFN and VANOC. The seven events involved more than 300 Aboriginal youth from the Vancouver-Whistler region.

Tourism

No measurable impacts on Aboriginal employment in the tourism sector or enhancement of Aboriginal tourism business have been noted during the 2003 to 2007 period. The signing of a statement of cooperation between the FHFN and the Aboriginal Tourism Association of BC in 2007 will result in the two groups working together on measures related to developing the Aboriginal cultural tourism industry, as well as supporting the Aboriginal Cultural Tourism Blueprint Strategy and the 2010 Aboriginal Trade Pavilion. Construction of the Squamish Lil'wat Cultural Centre, showcasing the cultures of the distinct BC First Nations, was nearing completion in 2007.



Looking Forward

For 2008 and Beyond

- As construction of the host venues is completed, hosting of major international events in BC is expected to rise. As of December 2007, there were 21 major winter sports events scheduled for 2008 and 2009 in BC alone.
- The strategy of the tourism industry is now focused on attempting to capitalize on the media exposure generated by the 2010 Winter Games to produce sustained, long-term increases in tourism that will occur beyond 2010. We note that media hits related to the 2010 Winter Games increased from 2,166 in 2007 to 4,143 in 2008. This signals a growing trend in media coverage, which should translate into greater awareness of BC and Canada as tourism destinations.
- Delivery of arts and culture programming began with the presentation of the 2008 Cultural Olympiad in Vancouver and the Whistler Celebration 2010™. Communities are expected to continue their preparations for 2010 and their participation as a host city, venue city, live site, or torch relay community.
- Funding expected for celebration sites in Vancouver and Whistler is \$20 million, torch relay programming \$24.5 million, and the opening ceremony of 2010 Winter Games \$20 million.
- The BC-Canada Pavilion will operate in Beijing for a full five months. The programs held at the Pavilion are intended to attract the Chinese business community.
- The Four Host First Nations Society (FHFN) and VANOC intend to launch a 2010 Aboriginal Licensing and Merchandising Program, and the FHFN will establish both a branding strategy and, in cooperation with Aboriginal Tourism BC, an authentication program to protect the intellectual property of Aboriginal peoples and create opportunities for development and marketing of Aboriginal products and services across Canada.
- A major area of focus in 2008 and 2009 is the development of the Aboriginal Trade Pavilion, a unique structure to be located in Vancouver. This project will provide short and medium term employment, training, and procurement opportunities.
- In 2008, the Government of Canada will conclude legacy agreements with the Musqueam and Tsleil-Waututh and will provide funding of \$34.5 million. These funds are to be used for land acquisitions, business development, training, and economic development opportunities to help ensure the communities share in the social, cultural, and economic benefits of the 2010 Winter Games.
- Venue construction will be completed during 2009 and operating expenditures by VANOC and others will begin in earnest. Crises in global financial markets and expectations of a potentially severe global recession in 2009 will undoubtedly slow economic growth in Canada. However, VANOC expenditures scheduled for between 2008 and 2010 may act as a stabilizer to the BC economy over that time, potentially softening the impact of a slowing global economy.
- Employment at VANOC will increase until 2010 when the organization will achieve its full complement of employees. Spending by VANOC will increase from 2008 to 2010 at a time when the economy is expected to be operating at less than its full potential; however, this spending may be at a level below that initially expected. Games-related expenditures by VANOC, sponsors, and other 2010 Winter Games partners may provide a much needed stimulus for the BC economy and the BC labour market.

